



# **Warehouse Management System Configuration Guide**

Release 7.5 SP1

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Warehouse Management System Configuration Guide, Release 7.5 SP1

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**B Copy Node Functionality**

**C Onboarding Enterprise to Node Functionality**

**D Setting Up a Weighing Scale**

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# Preface

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This manual describes how to use the Warehouse Management System business application module in the Yantra 7x Configurator.

## Intended Audience

This manual is intended for use by system administrators and managers who need to configure Yantra 7x rules and business processes as they pertain to their distributed order management business practices.

## Structure

This manual contains the following sections:

### **Chapter 1, "Introduction"**

This chapter briefly describes the contents of this guide.

### **Chapter 2, "Navigating in the Configurator"**

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

### **Chapter 3, "Configuring Warehouse Layout"**

This chapter explains how you can configure Warehouse Layout. Warehouse Layout defines the physical layout and related attributes of a warehouse.

## **Chapter 4, "Configuring Inventory"**

This chapter explains how you can configure inventory that defines the comprehensive functionality of Yantra 7x WMS to track, monitor, and maintain inventory in a warehouse.

## **Chapter 5, "Configuring Receiving"**

This chapter explains how you can configure the rules and activities expected to be performed for inventory being received.

## **Chapter 6, "Configuring Quality Control"**

This chapter explains how you can configure the quality control process that defines the system for ensuring the maintenance of proper standards in manufacturing goods, especially by random inspection of the product.

## **Chapter 7, "Configuring Picking"**

This chapter explains how you can configure the parameters and common codes used for determining algorithms and pipelines used for picking.

## **Chapter 8, "Configuring Value Added Services"**

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

## **Chapter 9, "Configuring Packing"**

This chapter explains how you can configure packing. Packing activities in a warehouse are determined based on the strategies used in outbound planning.

## **Chapter 10, "Configuring Shipping"**

This chapter explains how you can configure shipping. Shipping defines the process to be followed after the completion of the Packing and VAS processes.

## **Chapter 11, "Configuring Transportation"**

This chapter explains how you can record transportation or in-transit updates for a container. These updates are recorded against activities defined in Yantra 7x as transportation activities.

## **Chapter 12, "Configuring Task Management"**

This chapter explains how you can configure task management that enables you to set up your warehouse to optimize node throughput and maximize worker efficiency.

## **Chapter 13, "Configuring System Administration"**

This chapter explains how you can configure common codes for, and set up the Devices, Bar Codes, and Prints.

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

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

## **Appendix B, "Factory Setup for High-Volume Pick Pack Warehouse"**

Yantra 7x WMS provides a set of factory defaults for the reference implementation of high-volume pick pack warehouse. The reference implementation enables a rapid development of the application, and highlights the capabilities of the product. This set-up is optional, and the configuration of data is specific to Yantra 7x WMS.

## **Appendix C, "Onboarding Enterprise to Node Functionality"**

This appendix lists all the configurations that get copied when onboarding an enterprise to a node.

## **Appendix D, "Setting Up a Weighing Scale"**

This appendix explains how you can setup and configure a weighing scale using the Yantra 7x WMS.

# **Yantra 7x Documentation**

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

- *Yantra<sup>®</sup> 7x Release Notes*
- *Yantra<sup>®</sup> 7x Installation Guide*
- *Yantra<sup>®</sup> 7x Upgrade Guide*
- *Yantra<sup>®</sup> 7x Performance Management Guide*

- *Yantra® 7x High Availability Guide*
- *Yantra® 7x System Management Guide*
- *Yantra® 7x Localization Guide*
- *Yantra® 7x Customization Guide*
- *Yantra® 7x Integration Guide*
- *Yantra® 7x Product Concepts*
- *Yantra® 7x Warehouse Management System Concepts Guide*
- *Yantra® 7x Platform Configuration Guide*
- *Yantra® 7x Distributed Order Management Configuration Guide*
- *Yantra® 7x Supply Collaboration Configuration Guide*
- *Yantra® 7x Inventory Synchronization Configuration Guide*
- *Yantra® 7x Product Management Configuration Guide*
- *Yantra® 7x Logistics Management Configuration Guide*
- *Yantra® 7x Reverse Logistics Configuration Guide*
- *Yantra® 7x Warehouse Management System Configuration Guide*
- *Yantra® 7x Platform User Guide*
- *Yantra® 7x Distributed Order Management User Guide*
- *Yantra® 7x Supply Collaboration User Guide*
- *Yantra® 7x Inventory Synchronization User Guide*
- *Yantra® 7x Logistics Management User Guide*
- *Yantra® 7x Reverse Logistics User Guide*
- *Yantra® 7x Warehouse Management System User Guide*
- *Yantra® 7x Mobile Application User Guide*
- *Yantra® 7x Analytics Guide*
- *Yantra® 7x Javadocs*
- *Yantra® 7x Glossary*
- *Yantra® 7x Carrier Server Guide*

- *Yantra® 7x Application Server Installation Guide* (for optional component)

# Conventions

The following conventions may be used in this manual:

Convention	Meaning
. . .	An ellipsis represents information that has been omitted.
< >	Angle brackets indicate user-supplied input.
mono-spaced text	Mono-spaced text indicates a file name, an API name, or a code example.
/ or \	Slashes and backslashes are file separators for Windows, UNIX and LINUX operating systems. The file separator for the Windows operating system is "\" and the file separator for Unix and Linux systems is "/". The Unix convention is used unless otherwise mentioned.





# Introduction

---

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

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

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

- Yantra 7x Distributed Order Management
- Yantra 7x Inventory Synchronization
- Yantra 7x Product Management
- Yantra 7x Logistics Management
- Yantra 7x Supply Collaboration

- Yantra 7x Reverse Logistics
- Yantra 7x Warehouse Management System
- Yantra 7x Platform

## 1.1 Business Models

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

For example, your company might be considered a multi-divisional corporation, a third-party logistics company, or a marketplace business. Each of these business models require a different conceptual approach to Yantra 7x configuration.

### 1.1.1 Multi-Divisional Corporation

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

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

### 1.1.2 Third-Party Logistics

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

Large companies can gain the competitive advantage through the real-time management of their supply chains. These advantages include lower costs and improved customer service. Additionally, new sales channels such as web stores, hand-held devices, and in-store kiosks

provide companies new methods of reaching their customers. All of these issues have increased the complexity of the fulfillment process.

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

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

### 1.1.3 Marketplace

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

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

## 1.2 Warehouse Management System Configuration

The Yantra 7x Warehouse Management System provides a comprehensive end-to-end solution that helps businesses manage inventory and processes through a networked warehouse management system.

Yantra 7x WMS is built using a robust architectural framework that provides enough flexibility to adapt to changing business needs. It is a

web-based application providing comprehensive visibility to each warehouse in the network.

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

- Warehouse Layout
- Inventory
- Receiving
- Quality Control
- Picking
- VAS
- Packing
- Shipping
- Task Management
- System Administration

### 1.2.1 Warehouse Layout

Warehouse Layout defines the physical layout and related attributes of a warehouse.

For more information, see [Chapter 3, "Configuring Warehouse Layout"](#).

### 1.2.2 Inventory

Inventory defines the comprehensive functionality of Yantra 7x WMS to track, monitor, and maintain inventory in a warehouse.

For more information, see [Chapter 4, "Configuring Inventory"](#).

### 1.2.3 Receiving

The process of receiving a product in the warehouse is based on the attributes of the shipment. The rules and activities expected to be performed for inventory being received is configured here.

For more information, see [Chapter 5, "Configuring Receiving"](#).

### 1.2.4 Quality Control

Quality Control process is integral to a warehouse to ascertain the standards of the inventory received, stored, and shipped. The parameters and common codes used in the Quality Control process is determined here.

For more information, see [Chapter 6, "Configuring Quality Control"](#).

### 1.2.5 Picking

The parameters and common codes used for determining algorithms and pipelines used for picking can be configured here.

For more information, see [Chapter 7, "Configuring Picking"](#).

### 1.2.6 Value Added Services

Use Value Added Services (VAS) to define the common codes and set-up for the Value Added Services.

For more information, see [Chapter 8, "Configuring Value Added Services"](#).

### 1.2.7 Packing

Packing activities in a warehouse are determined based on the strategies used in outbound planning. Use Packing to define the common codes for packing of inventory in the warehouse.

For more information, see [Chapter 9, "Configuring Packing"](#).

### 1.2.8 Shipping

Shipping defines the process to be followed after the completion of the Packing and VAS processes. Use Shipping to configure the common codes related to the shipping process.

For more information, see [Chapter 10, "Configuring Shipping"](#).

### 1.2.9 Task Management

Use Task Management to define the common codes and set up Task Types, Installation Rules, Reason Codes, User Constraints, Productivity Types, and Execution Exception.

For more information, see [Chapter 12, "Configuring Task Management"](#).

### 1.2.10 System Administration

Use System Administration to define common codes and set up Devices, Bar Codes, and Prints.

For more information, see [Chapter 13, "Configuring System Administration"](#).

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**Note:** Yantra 7x WMS provides a set of factory defaults for the reference implementation of high-volume pick pack warehouse. This configuration data is explained in [Appendix B, "Factory Setup for High-Volume Pick Pack Warehouse"](#).

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## Navigating in the Configurator

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

### 2.1 Starting the Yantra 7x Configurator

To access the Yantra 7x Configurator:

1. Point your browser to:

```
http://<Server where Yantra 7x is installed>/yantra/console/start.jsp
```

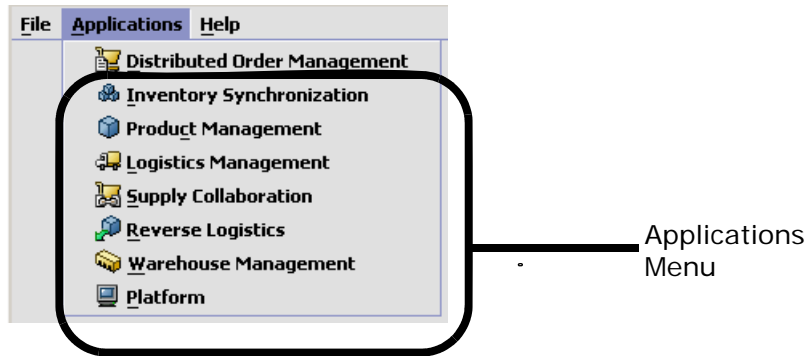
The browser now displays the Sign In window.

2. Enter your login ID and password and choose the Sign In button. The Yantra 7x Application Consoles Home Page is displayed.
3. From the menu bar, choose Configuration > Launch Configurator. The Yantra 7x Configurator opens in a new window.

### 2.2 The Yantra 7x Configurator Layout

The Yantra 7x Configurator is a graphical user interface that can be used to configure different aspects of Yantra 7x. The different configurations are defined by logical groupings called applications that can be accessed from the Configurator's menu bar.

**Figure 2–1 Applications Menu**



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

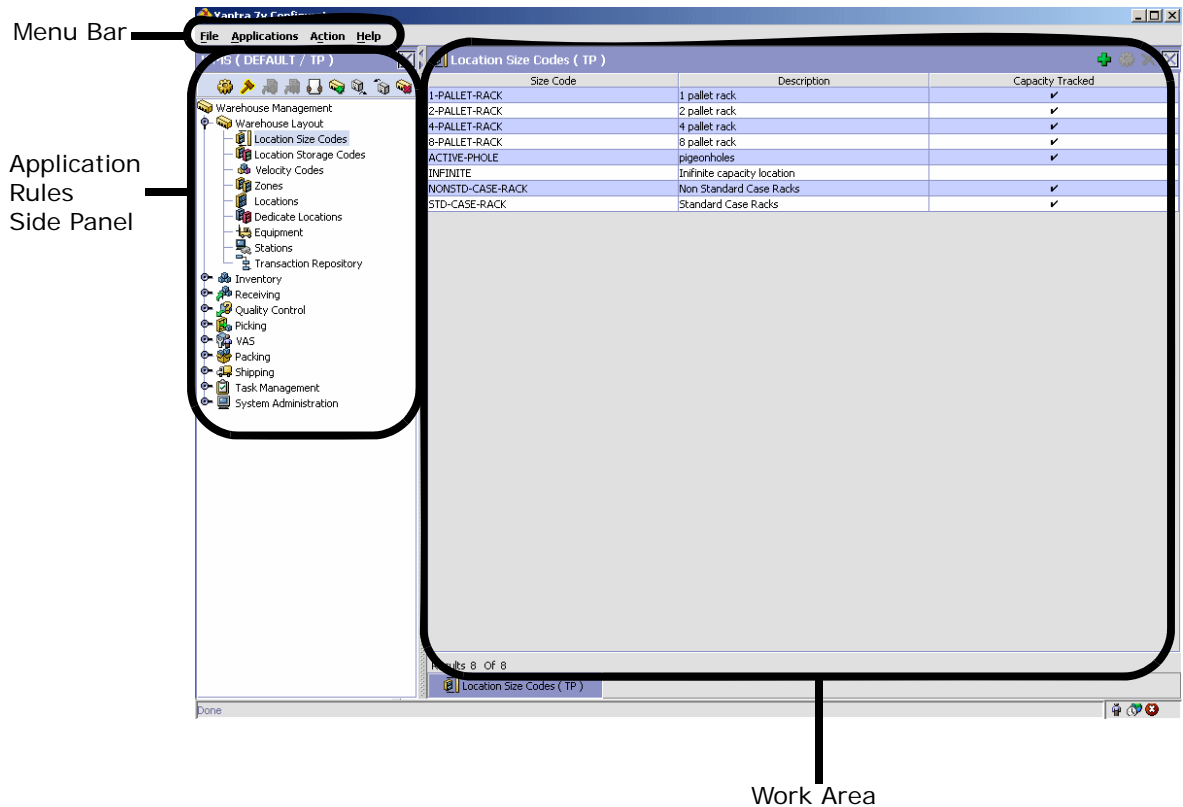
The following applications can be configured in this version of Yantra 7x:

- Yantra 7x Distributed Order Management
- Yantra 7x Inventory Synchronization
- Yantra 7x Product Management
- Yantra 7x Logistics Management
- Yantra 7x Supply Collaboration
- Yantra 7x Reverse Logistics
- Yantra 7x Warehouse Management System
- Yantra 7x Platform

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



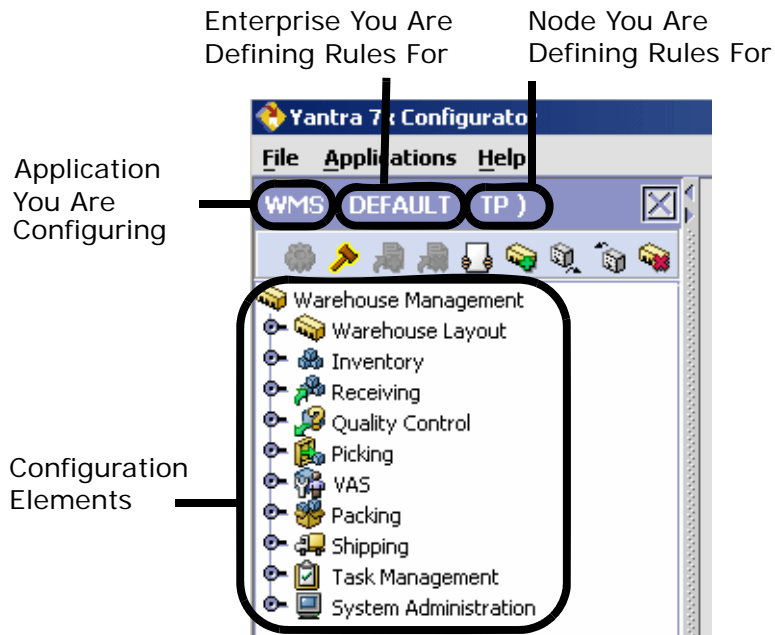
Figure 2–2 The Standard Configurator Application Interface



### 2.2.1 Application Rules Side Panel

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

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




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

You can use the application rules side panel for:

- [Accessing Configuration Screens](#)
- [Determining Inheritance](#)
- [Loading Another Node's Rules](#)
- [Filtering Application Rules](#)
- [Copying an Existing Node to a New Node](#)
- [Onboarding an Enterprise to a Node](#)
- [Offboarding an Enterprise from a Node](#)
- [Deleting the Current Node](#)

### 2.2.1.1 Accessing Configuration Screens

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

Alternatively, select applicable configuration element, and choose  to access relevant configuration screen.

### 2.2.1.2 Determining Inheritance

In Yantra 7x, when an Enterprise is created it can inherit all or part of an existing Enterprise's configuration rules. This inheritance is done at the configuration group level. A configuration group is a classification of similar configuration elements. For example, all of the rules and configurations dealing with items are grouped together into one configuration group and all of the rules and configurations dealing with organizations are grouped into another.

An administrator organization is set for every organization defined within the system. Only the administrator organization can modify the rules defined for a particular organization. If a particular organization administers multiple organizations, then they can load the rules of organization that it administers within the application tree. For more information about loading another organization's rules, see [Section 2.2.1.3, "Loading Another Node's Rules"](#) on page 16.

Configuration groups are associated with organization levels. Organization levels determine how configuration groups are inherited and which organizations can maintain them. The organization levels defined in Yantra 7x are:

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

- Inventory Organization - Configuration groups that are associated with the organization(s) that maintains the inventory within the Hub environment
- Organization - Configuration groups that are associated with any organization within the Hub environment.

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

**Table 2–1 Organization Level Rules**

Organization Level	Organizations That Can Modify at this Level...	Inheritance Details
Hub Level	Only the Hub organization can modify configuration groups at the Hub level. All other organizations have read-only access.	All organizations share this information.
Enterprise Level	Only Enterprise organizations can modify configuration groups at the Enterprise level.  Any business transaction requiring Enterprise configuration is picked up from the Enterprise established by the transactional context. For example, order documents have a specific Enterprise.	An Enterprise can inherit this configuration from another Enterprise. Additionally, this configuration can be overridden at a configuration group level.  When an Enterprise is created, it inherits Enterprise level rules from its primary Enterprise.
Catalog Organization	Organizations that are designated as catalog organizations can modify configuration groups at the catalog organization level.	None.

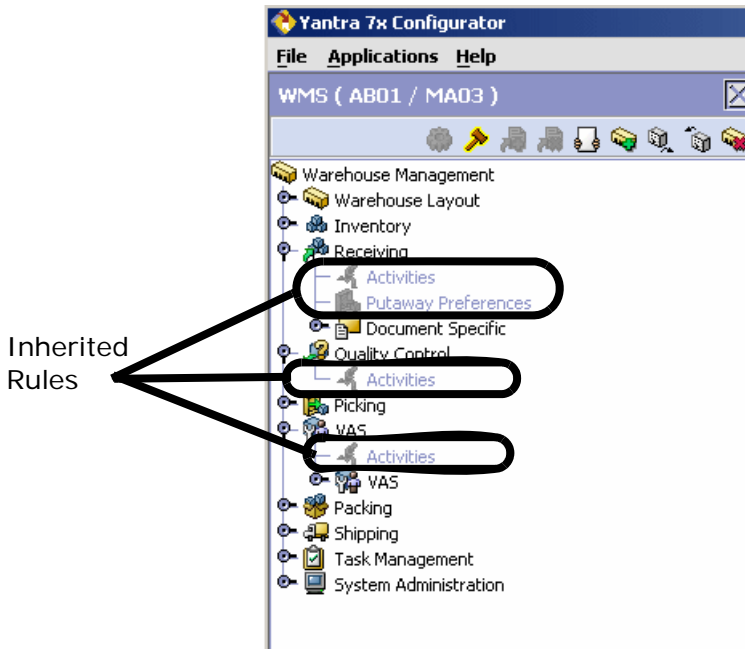
Table 2–1 Organization Level Rules

Organization Level	Organizations That Can Modify at this Level...	Inheritance Details
Inventory Organization	Organizations that are designated as inventory organizations can modify configuration groups at the inventory organization level.	None.
Organization	Any organization assigned a role (Seller, Buyer, etc.) can modify configuration groups at the organization level.	None.

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

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

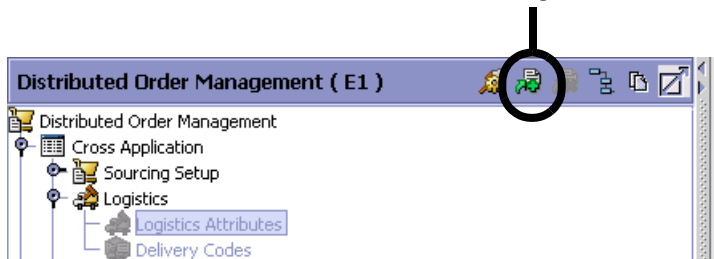
**Figure 2–4 Inherited Rules in the Application Rules Side Panel**



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

**Figure 2–5 Override Configuration Icon**

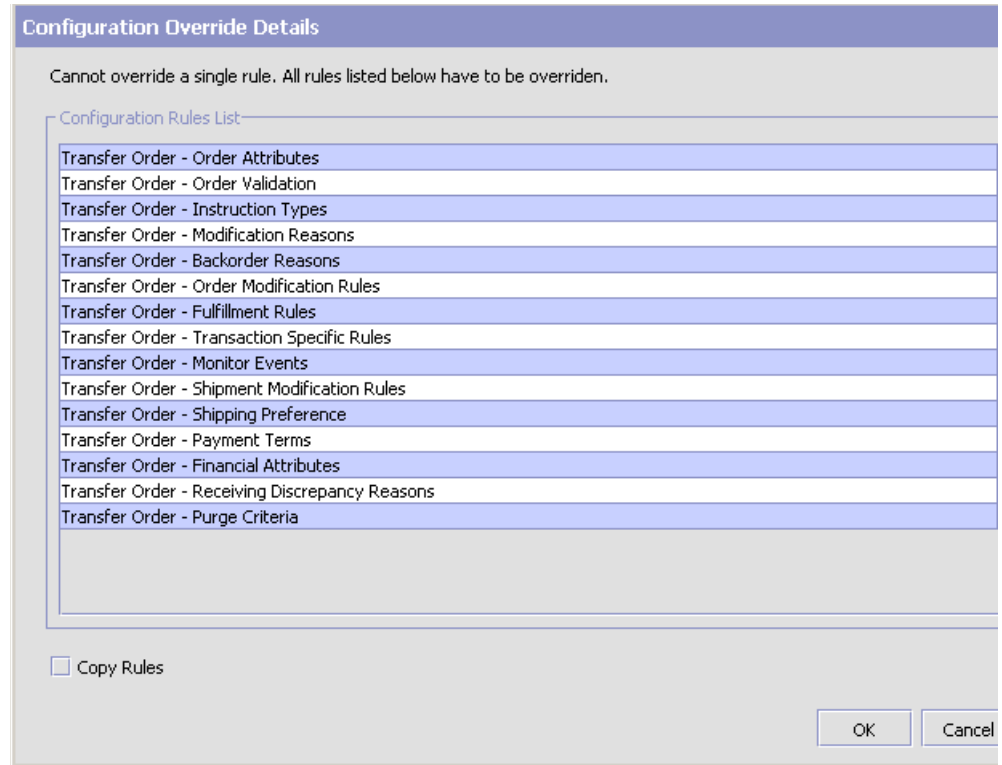
Load Override Configuration Icon is Available



When you choose to override a rule you also override any other rules in the configuration group the rule you are overriding is associated with.

When you choose the Override Configuration icon the Configuration Override Details pop-up window is displayed. This window provides the list of rules that will be overridden.

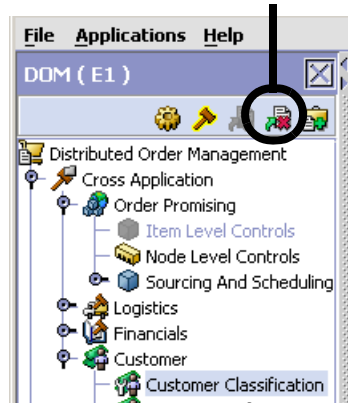
**Figure 2–6 Example of Configuration Override Details Pop-Up Window**



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

**Figure 2–7 Give Back Configuration Ownership Icon**

Give Back Configuration Ownership Icon is Available



### 2.2.1.3 Loading Another Node's Rules


An administrator organization is set for every enterprise (organization) defined within the system. Only the administrator organization can modify the rules defined for a particular enterprise or node.

If a particular organization administers multiple nodes, then it can load the rules of the nodes that it administers within the application tree.

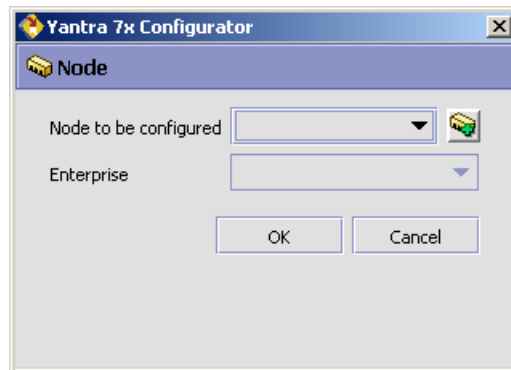
See [Table 2–1](#) for the rules that determine which organizations you can administer.

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

To load another node's rules in Warehouse Management System:

1. From the application rules side panel, choose .
2. The Node pop-up window appears.





3. From Node to be configured, select the Ship Node that you want to work with.
4. From Enterprise, select the Node's Enterprise that you want to configure.
5. Choose OK. The node's rules are displayed in the application rules side panel.

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

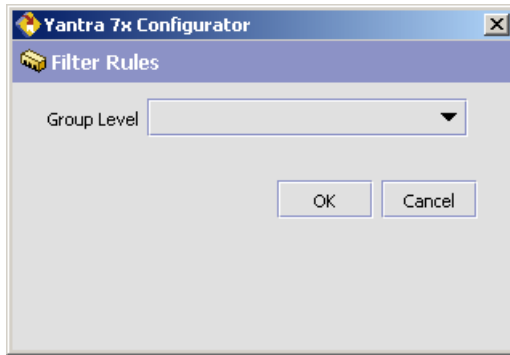
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#### 2.2.1.4 Filtering Application Rules

The application rules side panel by default displays all the rules available for a user. The application rules may be filtered to display specific rules, grouped by CatalogOrg, Enterprise, Hub, InventoryOrg, Node or Organization level, using the Filter Rules functionality.

To filter application rules in the application rules side panel:

1. From the application rules side panel, choose .
2. The Filter Rules pop-up window appears.



3. From Group Level, select the level you want to filter rules in the application side panel. The application rules can be filtered by CatalogOrg, Enterprise, Hub, InventoryOrg, Node and Organization.
4. Choose OK. The applicable rules are displayed in the application rules side panel.

### 2.2.1.5 Copying an Existing Node to a New Node

Yantra 7x WMS provides a Rapid Deployment Tool (RDT) feature to copy the configuration of one WMS node to another new WMS node. For more information about RDT features see *Yantra 7x Integration Guide*.


The Copy Node feature is useful in implementations having multiple nodes with similar, if not identical, configurations. If there are many thousands of locations, rollback errors may be thrown, in which case the rollback segment needs to be increased.

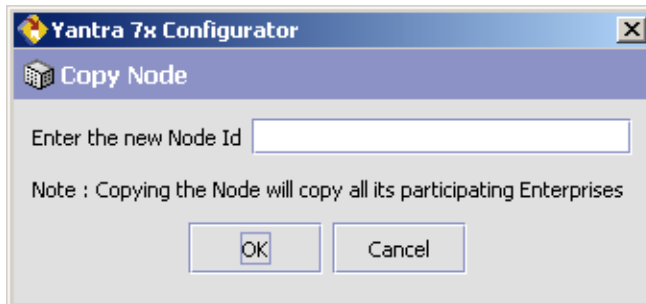
For more information on the configurations that are copied when copying a node, refer to [Appendix B, "Copy Node Functionality"](#).

**Important:** When you copy a node, the system automatically copies the Fill Code data from the source node to the newly copied node, irrespective of the inventory status. For details about fill code, refer to [Table 3–9](#).

It is recommended that the Copy Node be used at a time of the day when there are no competing updates to the Configuration.

To copy an existing node to a new node:

1. From the application rules side panel, choose .
2. The Copy Node pop-up window displays.



3. Enter the ID for the new node being created by copying the existing node. You can enter the ID of a node you want to create or the ID of an existing node that is not configured.

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**Note:** Yantra recommends that you do not enter the ID of an existing node that is configured. This is because when the system copies the source node configuration, there may be conflicts with the existing configuration which may result in an exception.

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4. Choose OK. The new node is created with all configuration data of the existing node, including all the participating enterprises.

---



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**Note:** You can copy a WMS node to an existing DOM node.

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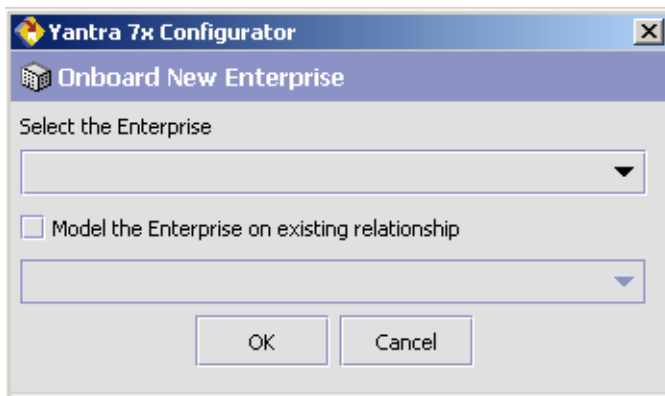
### 2.2.1.6 Onboarding an Enterprise to a Node

A new participation between an enterprise and a node may be created using the Yantra 7x WMS RDT feature. The creation of this participation between the enterprise and an existing node is called onboarding an enterprise to a node.

For more information on the configurations that are copied when onboarding an enterprise to a node, refer to [Appendix C, "Onboarding Enterprise to Node Functionality"](#).

To onboard an enterprise to the current node:

1. From the application rules side panel, choose .
2. The Onboard New Enterprise pop-up window appears.




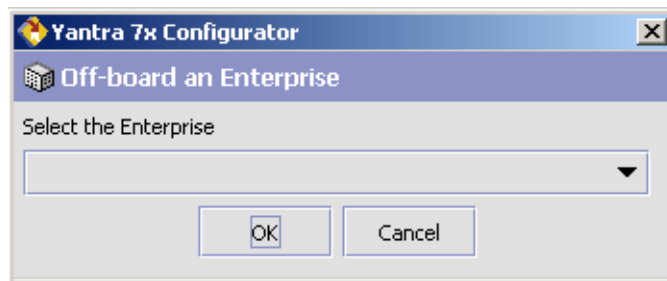
3. Select the Enterprise to be onboarded to the node from the drop down menu. This lists all the enterprises existing in the Platform but not participating with the current node.
4. If the relationship shared with the new onboarded Enterprise is same as any other existing Enterprise, select the 'Model the Enterprise on existing relationship' and choose relevant Enterprise from the drop down.
5. Choose OK. The new enterprise is onboarded to the current node, and where applicable modeled on an existing relationship.

### 2.2.1.7 Offboarding an Enterprise from a Node

The participation between an enterprise and a node may be removed using the Yantra 7x WMS RDT feature. The deletion of the participation between the onboarded enterprise and the node is called offboarding an enterprise from a node.

To offboard an enterprise from the current node:

1. From the application rules side panel, choose .
2. The Offboard an Enterprise pop-up window appears.




3. Select the Enterprise to be offboarded from the node from the drop down menu. This lists all the enterprises currently participating (onboarded) with the current node.
4. Choose OK. The selected enterprise is offboarded from the current node.

**Note:** If the Node contains inventory for this Enterprise in any location, then the Enterprise will not be offboarded.

### 2.2.1.8 Deleting the Current Node

The Yantra 7x WMS RDT feature may be used to delete the current WMS Node. This action deletes the current node, and all existing participations with Enterprises onboarded to the node.

To delete the current node:

1. From the application rules side panel, choose .

2. A warning message 'Are you sure you want to delete the current node?' appears.
3. Click 'OK' to delete the node. Alternatively, click 'Cancel' to cancel the deletion.

---

---

**Note:** If any of the participating Enterprises in the Node contain inventory, then the Node will not be deleted.

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## 2.2.2 Work Area

The work area is the main area in which different configuration screens appear. The following are the main types of screens that you will come across:

- [Search Window](#)
- [List Window](#)
- [Details Window](#)
- [Drag and Drop Window](#)

### 2.2.2.1 Search Window

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

Figure 2–8 Search Window Example

**Location Search ( DEFAULT / MA03 )**

Location:  Zone:

Aisle #:  Location Type:

☐ Empty Location      Size Code:

☐ No In Staging Location      In Staging Location:

☐ No Out Staging Location      Out Staging Location:

☐ Freeze for Putaway      Velocity Code:

☐ Freeze for Picking      Storage Code:

Max Records:  200

**Locations**

Location	Zone	Location Type	Storage Code	Putaway Sequenc...	Picking Sequence #	Velocity Code
01010101	CASE1	REGULAR	REGULAR	1,010,101	1,010,101	A
01010102	CASE1	REGULAR	REGULAR	1,010,102	1,010,102	A
02010101	CASE1	REGULAR	REGULAR	2,010,101	2,010,101	A
50010101	CASE2	REGULAR	REGULAR	50,010,101	50,010,101	B
50010102	CASE2	REGULAR	REGULAR	50,010,102	50,010,102	B
75010101	PALLETTRACK	REGULAR	REGULAR	75,010,101	75,010,101	C
75010102	PALLETTRACK	REGULAR	REGULAR	75,010,102	75,010,102	C
99999991	INFINITE	STAGING		99,999,999	99,999,999	C
99999992	INFINITE	STAGING		99,999,999	99,999,999	C
A1010101	ACTIVE	REGULAR		11,010,101	51,010,101	C
A1010102	ACTIVE	REGULAR		11,010,102	51,010,102	C
DOCK	DOCK	DOCK		1	1	C
FL01	INFINITE	STAGING		1	1	C
MNFST1	SHIP	STAGING		9,999,999	9,999,999	C
PACK1	PACK	STAGING		9,999,999	9,999,999	C

Results 19 of 19

**Location Search ( DEFAULT / MA03 )**

### 2.2.2.2 List Window

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

Figure 2–9 List Window Example

Inventory Status List

Inventory Status	Description	Supply Type
D	dd	ONHAND
N	Normal	ONHAND
Q	Quality	HELD
*		

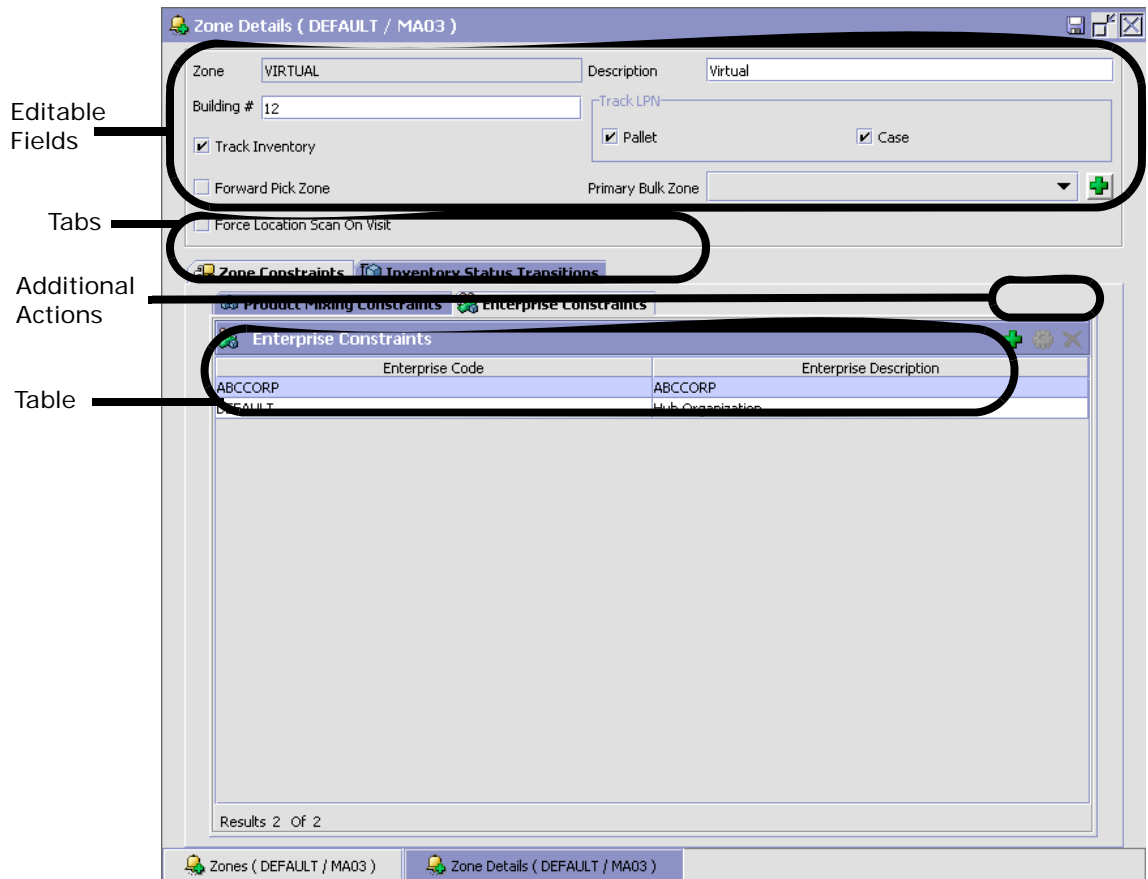
Results 3 Of 3

Inventory Status List

2.2.2.3 Details Window

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

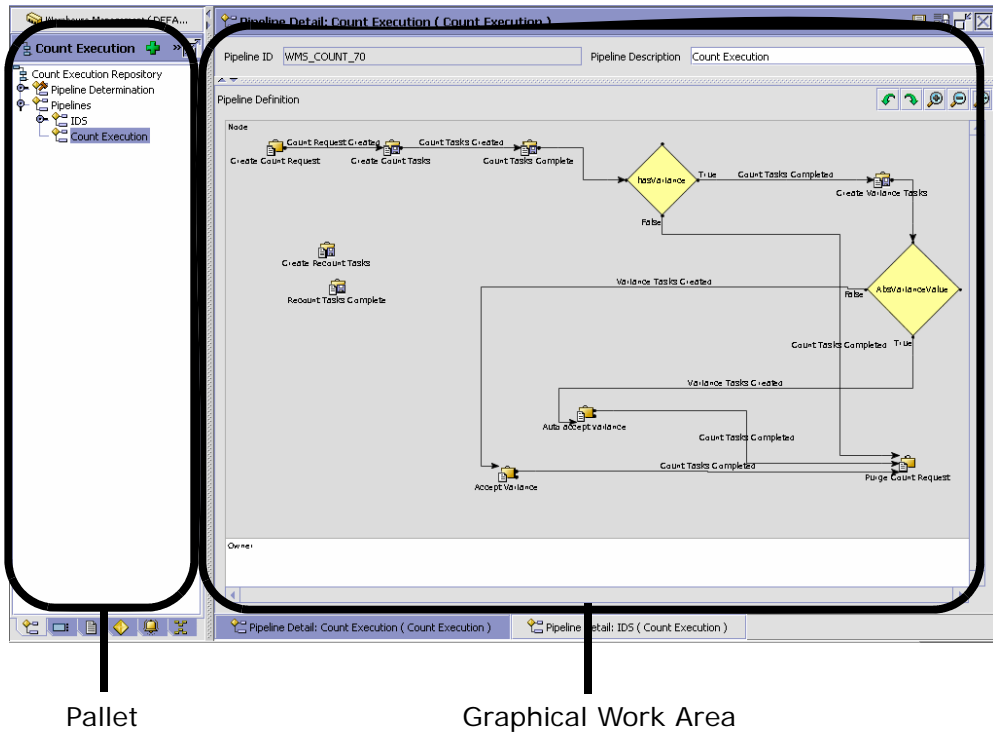


**Figure 2–10 Details Window Example**

#### 2.2.2.4 Drag and Drop Window

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

**Figure 2–11 Drag and Drop Window Example**



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

Many components have one or more branches. To connect the next component to the originating component, you must drag the graphical component until it forms a connecting line with one of the other component's sides, links can be set up horizontally or vertically. To delete any components or links, right-click the component and choose Delete. Once components and links have been established you can move them around by dragging them, the links redraw themselves according to the new position. If you hold CTRL while dragging a component, the component is copied within the graphical work area.

## 2.3 Actions Available Throughout the Yantra 7x Configurator

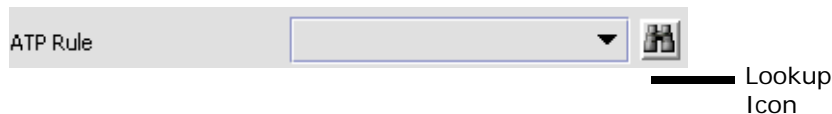
The following actions can be performed throughout the Yantra 7x Configurator:

- [Using Configurator's Lookup Functionality](#)
- [Viewing the User Logged into the Configurator](#)
- [Using Lists and List Filtering](#)
- [Using On-Line Help](#)
- [Troubleshooting Errors](#)

### 2.3.1 Using Configurator's Lookup Functionality

Throughout the Yantra 7x Configurator there are many fields that have a lookup functionality to find or create additional records as they pertain to that field. For example, on the Primary Info tab of the Organization Details screen, the Locale field has a lookup functionality to create a new locale from that screen. When you choose the Create New lookup button the Locale Details information appears in a pop-up screen for you to modify.

**Figure 2–12 Lookup Icon Example**



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

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

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

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

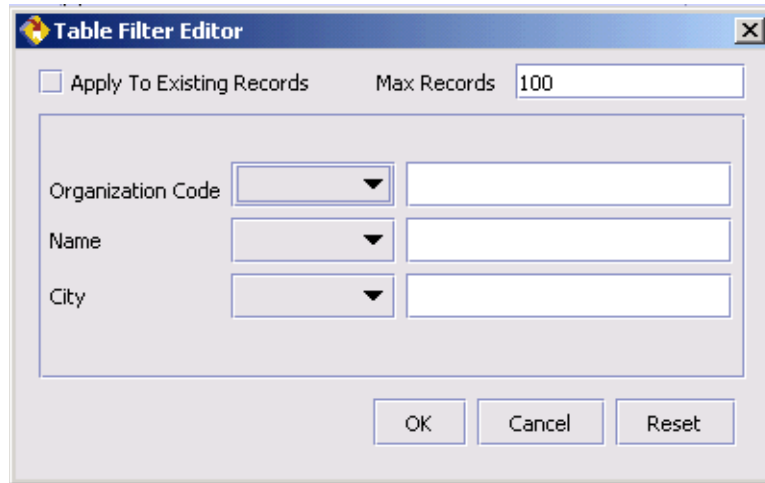
### 2.3.2 Viewing the User Logged into the Configurator

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

### 2.3.3 Using Lists and List Filtering

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

**Figure 2–13 Table List Editor Window Example**



**Important:** When you perform a search, only 100 records are listed by default. Use the list's Table Filter Editor to increase the maximum amount of records returned by a search.



### 2.3.4 Using On-Line Help

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

### 2.3.5 Troubleshooting Errors

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

To view Yantra 7x system error descriptions:

1. From the menu bar, choose Help > Troubleshooting. The Error Search window appears.
2. Enter the applicable search criteria and choose . A list of error codes and their descriptions are displayed.
3. Choose  to view the cause of the error and action to take to troubleshoot it.



## Configuring Warehouse Layout

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Warehouse Layout defines the physical layout and related attributes of a warehouse.

Use Warehouse Layout for:

- [Defining Location Size Codes](#)
- [Defining Location Storage Codes](#)
- [Defining Velocity Codes](#)
- [Defining Zones](#)
- [Defining Zone Constraints](#)
- [Defining Locations](#)
- [Defining Dedicate Locations](#)
- [Defining Dock Scheduling Rule](#)
- [Defining Equipment](#)
- [Defining Stations](#)
- [Defining Transaction Repository](#)

### 3.1 Defining Nodes

A *Node* (also called a warehouse) is an entity that receives or ships inventory. A node in Yantra 7x Warehouse Management System belongs to an organization or enterprise, and may be shared across all enterprises.

For example, nodes are used by buyer organizations for receiving inventory, and by seller organizations for shipping inventory. A carrier

organization, on the other hand, uses nodes both for shipping and delivering inventory.

A node in Yantra 7x WMS is defined for all types of warehouses including distribution centers, flow-through centers, returns or VAS centers, or third party distribution locations. For more information about defining a node, see the *Yantra 7x Platform Configuration Guide*.

3.1.1 Configuring a Node

The Yantra 7x Warehouse Management System has been designed to support a Level 2 or Level 3 warehouse. This ensures that Yantra 7x WMS automatically supports the Level 1 warehouse.

See [Table 3–1](#) for a list of the standard capabilities of different Warehouse Levels and their adoption rate (Source: AMR Research).

*Table 3–1 Warehouse Levels and Capability*

WMS Level	Capability	Adoption
Level 1	Manual picking & receiving operation No location level inventory	35%
Level 2	Order release with pre-sequencing, sorting and grouping Real time stock updates Limited storage capabilities/location level inventory	45%



**Table 3–1 Warehouse Levels and Capability**

WMS Level	Capability	Adoption
Level 3	Task management Real time optimization Cross dock and flow through processing Radio frequency integration Material handling equipment	20%
Level 4	Advanced labor planning 3D co-ordinates Cost optimization of pick path and slotting Facility and equipment design integration Advanced scenario simulations	Less than 2%

A warehouse may be configured using either the “Application Consoles” interface or “Networked WMS” interface, depending on the kind of functionality that the node requires.

A node that uses the “Networked WMS” interface has all the WMS features available, irrespective of it being Level 1 or Level 3. On the other hand, a node using the “Application Consoles” interface has lesser features available. For a list of the functionalities available to a node using the “Application Consoles” interface, see [Table 3–2](#).

The need for “Application Consoles” interface is explained in these use-cases:

- Drop Ship Suppliers need visibility to the orders that they have to pick, pack, and ship. The “Application Consoles” interface provides a real time view to all their orders, and ability to print pick/pack lists, record packing information, print shipping labels/carrier compliant labels, print BOLs, and confirm shipment of these orders through parcel/LTL carriers. Drop Ship Supplier may or may not track inventory on Yantra 7x WMS.
- Vendors of a buyer enterprise need visibility to POs placed by the enterprise, to create ASNs for the products shipped by them. These vendors may not track inventory on Yantra 7x WMS.

For more information about these interfaces and how to configure them, see the *Yantra 7x Platform Configuration Guide*.

**Table 3–2 Application Consoles Functionalities**

Functionality	Availability in Interface
Warehouse layout: Location, Zone definition	No
Inventory: Location level inventory/LPN inventory	No
Count	No
Task Management	No
Receipt	No
Inspection	Yes
Putaway	No
Kitting: Made to Stock & Made to Order	Yes
Shipment creation and confirmation	Yes
ESP Check	No
Shipment Routing	No
Pick List Print	Yes
Wave planning	No
Containerization	Yes
Batching	No
Replenishment	No
Picking	No
Packing	Yes
Shipping Labels	Yes
Pack List	Yes
Post pick VAS	No
Build Pallet containing Cases	No
BOL Print	Yes

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**Note:** For more information about Defining Node Attributes, see the *Yantra 7x Platform Configuration Guide*.

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## 3.2 Defining Location Size Codes

A *Location Size Code* defines the capacity of a location. The capacity of a location is specified by its length, width and height. The additional attributes are explained in [Table 3–3](#).

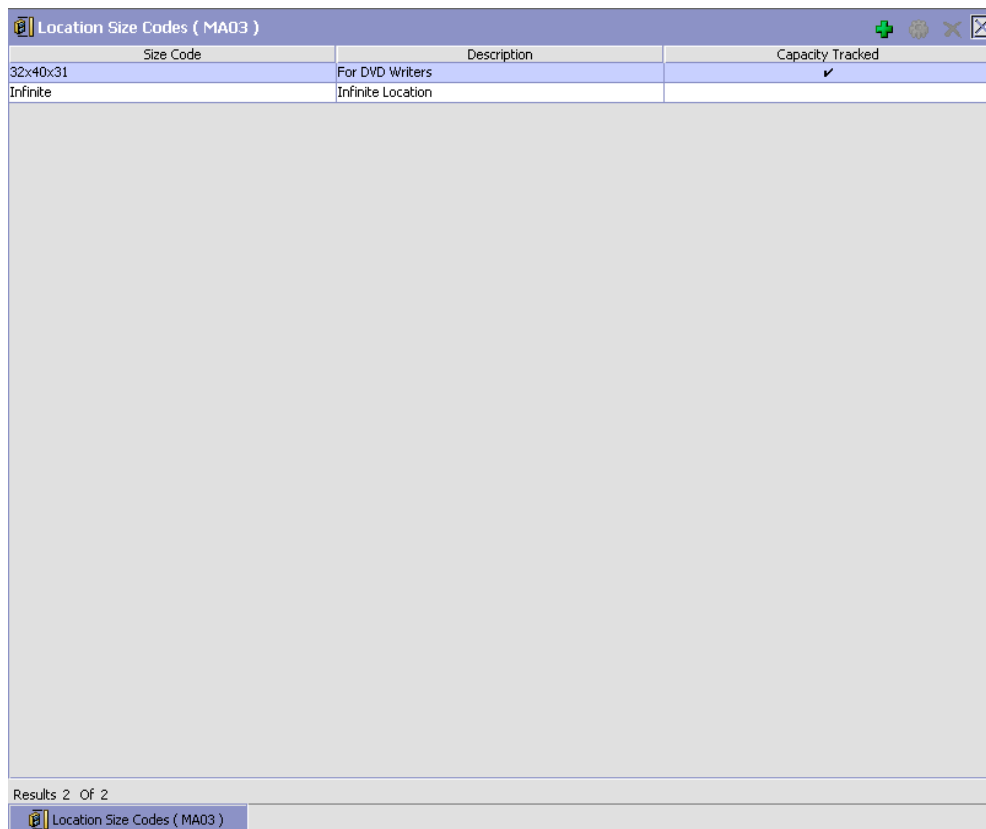
Use Location Size Codes for:

- [Creating a Location Size Code](#)
- [Modifying a Location Size Code](#)
- [Deleting a Location Size Code](#)

### 3.2.1 Creating a Location Size Code



To create a location size code:

1. From the tree in the application rules side panel, choose Warehouse Layout > Location Size Codes. The Location Size Codes window is displayed.



Size Code	Description	Capacity Tracked
32x40x31	For DVD Writers	<input checked="" type="checkbox"/>
Infinite	Infinite Location	<input type="checkbox"/>

Results 2 Of 2

2. In the Location Size Codes window, choose . The Location Size Code Details window is displayed.
3. Enter information in the applicable fields. See [Table 3–3](#) for field value descriptions.
4. Choose .

**Location Size Code Details ( MA03 )**

Location Size Code: 32x40x31      Description: For DVD Writers

☒ Capacity Tracked    ☐ Single Deep

Length: 20    IN      Width: 30    IN      Height: 20    IN

Volume: 12,000    CIN      Max Weight: 22,222,222    LBS

**Capacity Constraints**

Enterprise Code	Item Size Classification	UOM	No. of Packages
*			

Results 0 Of 0

Location Size Codes ( MA03 )    Location Size Code Details ( MA03 )

**Table 3–3 Location Size Code Details Window**

Field	Description
Location Size Code	Enter the location size code.  The list of location size codes is reflective of the different types of storage in the warehouse. Typically only large variances in the capacity are broken up into different size codes.
Description	Enter a brief description for the location size code.
Capacity Tracked	Select only if the location size tracks the capacity.

**Table 3–3 Location Size Code Details Window**

Field	Description
Single Deep	Select only if the location is single deep. A location is single deep if the depth of the location is such that it can only hold one LPN.
Length	Enter the length of the location. The length UOM is populated automatically from the node's locale.
Width	Enter the width of the location. The width UOM is populated automatically from the node's locale.
Height	Enter the height of the location. The height UOM is populated automatically from the node's locale.
Volume	Indicates the volume of the location. The volume UOM is populated automatically from the node's locale.
Max Weight	Enter the maximum weight that the location can hold. The weight UOM is populated automatically from the node's locale.
<b>Capacity Constraints</b> <b>Specifying Capacity Constraints is optional. For example, capacity constraints would not be set up for a location size marked as INFINITE.</b>	
Enterprise Code	Select the enterprise that is placing capacity constraints for the size code. Enterprise code is a mandatory field, to specify the other attributes.
Item Size Classification	Enter the item classification that is placing capacity constraints for the size code.

**Table 3–3 Location Size Code Details Window**



Field	Description
UOM	Select the unit of measure that is placing capacity constraints for the size code.  The list of valid UOMs for the enterprise is automatically populated.
No of Packages	Enter the maximum number of packages that the size code can hold for the capacity constraints specified.  For example, a size code for a single pallet location can hold one package of UOM type SINGLE-PALLET. A size code of multi-case location can hold two packages of UOM type CASE.

**Note:** It is recommended that the most frequently used locations/docks/stations are set up with a size code that does not track capacity (i.e. infinite capacity locations). Performance of operations like receiving, putaway, shipping, and packing will be greatly enhanced if the locations/station locations are modelled as infinite.

### 3.2.2 Modifying a Location Size Code


Once a location size code has been created, it can be modified.

To modify a location size code:

1. From the tree in the application rules side panel, choose Warehouse Layout > Location Size Codes. The Location Size Codes window is displayed with the list of Location Size Codes.
2. Choose the Location Size Code to be modified. Choose .
3. The Location Size Code Details window is displayed.
4. Enter information in the applicable fields. See [Table 3–3](#) for field value descriptions.
5. Choose .

### 3.2.3 Deleting a Location Size Code

To delete a location size code:

1. From the tree in the application rules side panel, choose Warehouse Layout > Location Size Codes. The Location Size Codes window is displayed with the list of Location Size Codes.
2. Choose the Location Size Code to be deleted.
3. Choose .

A location size code cannot be deleted if there are locations using the size code.

### 3.3 Defining Location Storage Codes

A *Location Storage Code* indicates the storage classification for a location. Location storage code allows a warehouse to store all items of a given storage profile at the same location.


For example, inflammable items are stored in locations equipped to handle fire hazards. Marking all suitable locations with a certain storage code ensures that inflammable items are stored safely at these fireproof locations.

Use Location Storage Codes for:

- [Creating a Location Storage Code](#)
- [Modifying a Location Storage Code](#)
- [Deleting a Location Storage Code](#)

#### 3.3.1 Creating a Location Storage Code

To create a location storage code:

1. From the tree in the application rules side panel, choose Warehouse Layout > Location Storage Codes. The Location Storage Codes window is displayed.
2. Enter information in the applicable fields. See [Table 3–4](#) for field value descriptions.
3. Choose .



Location Storage Codes ( DEFAULT / MA03 )

Storage Code	Description
*:	

Results 0 Of 0

Location Storage Codes ( DEFAULT / MA03 )


**Table 3–4 Location Storage Codes Window**

Field	Description
Storage Code	<p>Enter the storage code.</p> <p>A storage code reflects the different types of locations in the warehouse. For example, locations to store inflammable items, locations to store SKU that require refrigeration, or locations that store regular SKU.</p> <p>The storage code is assigned to a location, and used by the putaway and retrieval algorithms. Enterprise specific SKU classifications are mapped to a storage code in Putaway Preferences and Retrieval Preferences.</p> <p>For more information about Putaway Preferences, see <a href="#">Section 5.2, "Defining Putaway Preferences"</a> on page 278.</p>
Description	Enter a brief description for the storage code.

### 3.3.2 Modifying a Location Storage Code


Once a location storage code has been created, it can be modified.

To modify a location storage code:

1. From the tree in the application rules side panel, choose Warehouse Layout > Location Storage Codes. The Location Storage Codes window is displayed with the list of location storage codes.
2. Enter information in the applicable fields. See [Table 3–4](#) for field value descriptions.
3. Choose .

### 3.3.3 Deleting a Location Storage Code

To delete a location storage code:

1. From the tree in the application rules side panel, choose Warehouse Layout > Location Storage Codes. The Location Storage Codes window is displayed with the list of location storage codes.
2. Choose the Location Storage Code to be deleted.
3. Choose .

A location storage code cannot be deleted if there are locations using the storage code.

## 3.4 Defining Velocity Codes

Velocity Codes are attributed to a location. A velocity code associates the location to a SKU's throughput.

For example, fast moving items are stored in the lower level locations, or locations reachable by hand, in the bulk zone.

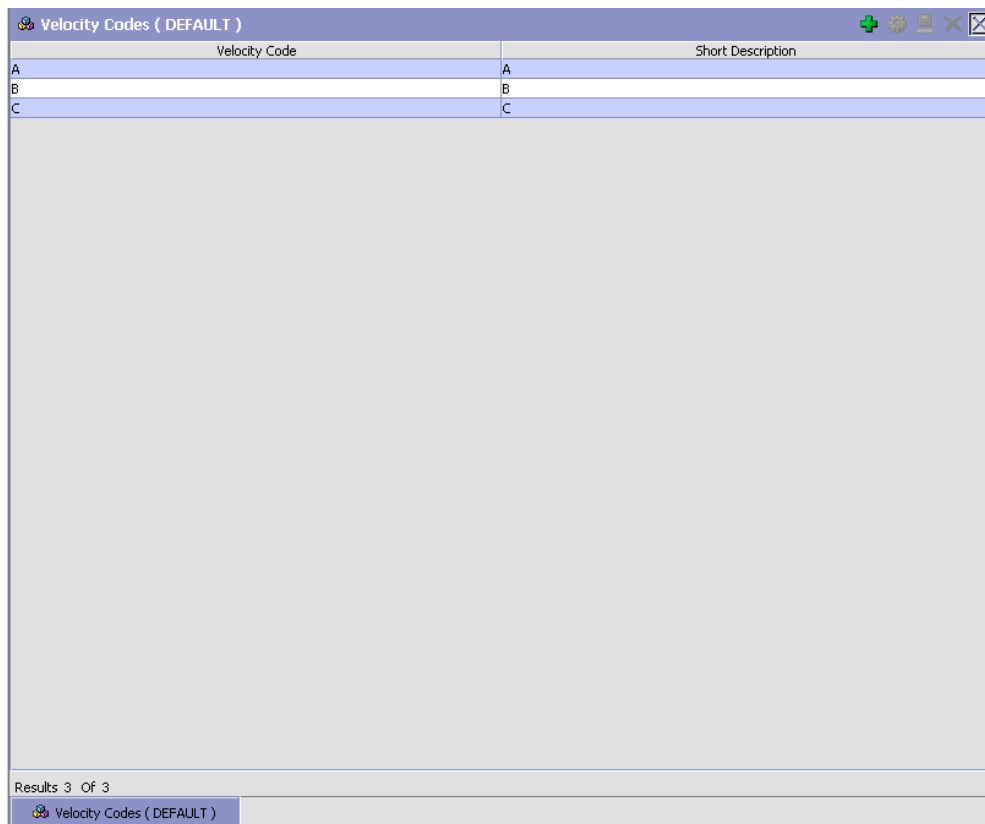
Use Velocity Codes for:

- [Creating a Velocity Code](#)
- [Creating a New Velocity Code from an Existing Velocity Code](#)
- [Modifying a Velocity Code](#)
- [Deleting a Velocity Code](#)

### 3.4.1 Creating a Velocity Code

To create a velocity code:



1. From the tree in the application rules side panel, choose Warehouse Layout > Velocity Codes. The Velocity Codes window is displayed.



Velocity Code	Short Description
A	A
B	B
C	C

Results 3 Of 3

Velocity Codes ( DEFAULT )

2. In the Velocity Codes window, choose . The Velocity Code Details pop-up window appears.
3. Enter information in the applicable fields. See [Table 3–5](#) for field value descriptions.
4. Choose .



The screenshot shows a software window titled 'Yantra 7x Configurator' with a subtitle 'Velocity Code Details'. Inside the window, there are three text input fields labeled 'Velocity Code', 'Short Description', and 'Long Description'.

**Table 3–5** *Velocity Code Details Pop-up Window*

Field	Description
Velocity Code	Enter a name for the velocity code being created. A velocity code associates the location to a SKU's throughput. Typically, fast moving items are stored in the lower level locations, or locations reachable by hand, in the bulk zone.
Short Description	Enter a short description for the velocity code being created.
Long Description	Enter a detailed description for the velocity code being created.

### 3.4.2 Creating a New Velocity Code from an Existing Velocity Code



To create a new velocity code from an existing velocity code:

1. From the tree in the application rules side panel, choose Warehouse Layout > Velocity Codes. The Velocity Codes window is displayed with the list of Velocity Codes.
2. Select the Velocity Code to be copied from. Choose .
3. The Velocity Code Details pop-up window appears.
4. Enter information in the applicable fields. See [Table 3–5](#) for field value descriptions.
5. Choose .

### 3.4.3 Modifying a Velocity Code


Once a velocity code has been created, it may be modified.

To modify an existing velocity code:

1. From the tree in the application rules side panel, choose Warehouse Layout > Velocity Codes. The Velocity Codes window is displayed with the list of Velocity Codes.
2. Select the Velocity Code to be modified. Choose .
3. The Velocity Code Details pop-up window appears.
4. Enter information in the applicable fields. See [Table 3–5](#) for field value descriptions.
5. Choose .

### 3.4.4 Deleting a Velocity Code

To delete an existing velocity code:

1. From the tree in the application rules side panel, choose Warehouse Layout > Velocity Codes.
2. The Velocity Codes window is displayed with the list of Velocity Codes.
3. Select the Velocity Code to be deleted.
4. Choose .

**Note:** The Yantra 7x factory-shipped Velocity Codes cannot be deleted.

## 3.5 Defining Zones

A *Zone* classifies a set of locations that share common properties. A warehouse is divided into multiple zones based on its attributes, like package type and velocity codes. Inventory for a SKU in Yantra 7x WMS is either stocked in a specific zone or in multiple zones and locations.

For example, case storage and unit storage make separate zones. Camcorders are stored in the lock and key zone, while television sets are stored in the bulk storage zone.

A zone in Yantra 7x WMS allows defining constraints for putaway, retrieval, and pick of SKUs in the warehouse. Zone level constraints can also be applied on a user through Task Management.

For example, a user can be dedicated to pick only in the refrigeration zone or a loose pick zone.

If a Zone contains a Location of VIRTUAL type, it is recommended that locations of other types be avoided in the same zone.

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**Note:** Zone level storage constraints are auto-propagated to locations through membership in a zone. The "mix" and "do not mix" constraints at the zone level, apply to every single location in the zone.

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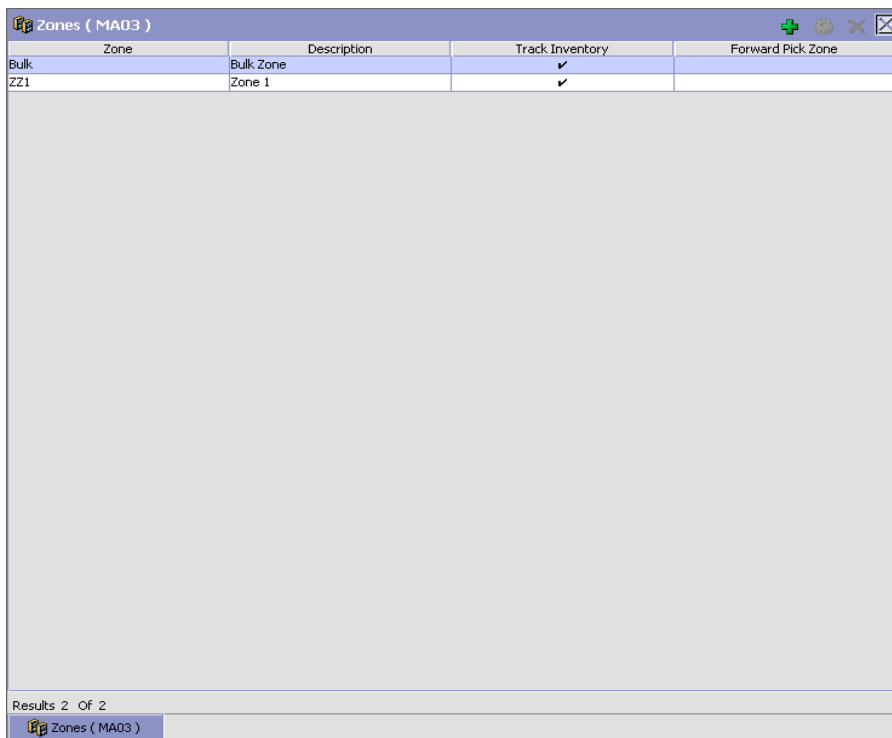
Use Zones for:

- [Creating a Zone](#)
- [Modifying a Zone](#)
- [Deleting a Zone](#)

### 3.5.1 Creating a Zone



To create a zone:

1. From the tree in the application rules side panel, choose Warehouse Layout > Zones. The Zones window is displayed.



Zone	Description	Track Inventory	Forward Pick Zone
Bulk	Bulk Zone	✓	
ZZ1	Zone 1	✓	

Results 2 Of 2

2. In the Zones window, choose . The Zone Details window is displayed.
3. Enter information in the applicable fields. See [Table 3–6](#) for field value descriptions.
4. Choose .



**Zone Details ( MA03 )**

Zone  Description

Building #  Primary Bulk Zone

☒ Track Inventory ☐ Forward Pick Zone

☒ Minimize No of Locations Per SKU

Locations in this Zone store product in multiples of

Track LPN ☒ Pallet ☒ Case

Max No of Locations Per SKU

**Zone Constraints** **Inventory Status Transitions** **Task Execution Preferences**

**Inventory Transition Rules**

	Inventory Status	Supply Type	New Inventory Status	New Supply Type
*				

Results: 0 Of 0

Zones ( MA03 ) Zone Details ( MA03 )

Table 3–6 Zone Details Window

Field	Description
Zone	Enter a name for the zone. The name characterizes the type of zone.
Description	Enter a brief description of the zone.
Building #	Enter building number for the zone. The building number is used to represent a satellite building for a warehouse.

**Table 3–6 Zone Details Window**

Field	Description
Primary Bulk Zone	<p>Choose the primary bulk zone for the forward pick zone.</p> <p>Primary bulk zone identifies the zone in which bulk stock is available for replenishment. Putaway algorithm utilizes this to determine the bulk zone nearest to the forward pick location.</p>
Track Inventory	<p>Select if the zone tracks inventory.</p> <p>NOTE: Zones containing virtual locations should not track inventory at LPN level. If inventory in a virtual location is tracked at LPN level, then associated LPNs cannot be deleted.</p>
Forward Pick Zone	<p>Select only if the zone is a forward pick zone.</p> <p>Forward pick zone identifies the zone where individual units of a SKU are picked.</p>
Minimize No. of Locations per SKU	<p>Select if SKU being put away could be consolidated into a location already containing the SKU.</p> <p>The capacity constraints of a location are considered when minimizing the locations through consolidation.</p>
Max No. of Locations per SKU	<p>Enter the maximum number of locations that an item can occupy in this zone.</p> <p>This attribute is of relevance in zones closest to the docks (high velocity zones), where the number of locations per item should not exceed a fixed number.</p>
Locations in this Zone store product in multiples of	<p>Choose the unit of measure utilized for the storage of products.</p> <p>Typical values are: 'Case,' 'Each,' 'Half Pallet,' 'Inner Pack,' and 'Pallet'.</p>
<b>Track LPN</b>	

**Table 3–6 Zone Details Window**

Field	Description
Pallet	<p>Select only if pallet license plates are tracked in this zone.</p> <p>For example, this flag is checked in all the zones of a warehouse that store pallet LPN, while it is unchecked for the forward pick zone to pick loose units.</p> <p>NOTE: Zones containing virtual locations should not track inventory at LPN level. If inventory in a virtual location is tracked at LPN level, then associated LPNs cannot be deleted.</p>
Case	<p>Select only if case license plates are tracked in this zone.</p> <p>For example, this flag is checked in all the zones of a warehouse that store case LPN, while it is unchecked for the forward pick zone to pick loose units.</p> <p>NOTE: Zones containing virtual locations should not track inventory at LPN level. If inventory in a virtual location is tracked at LPN level, then associated LPNs cannot be deleted.</p>
<b>Zone Constraints Tab</b>	For more information about setting up Zone Constraints, see <a href="#">Section 3.6, "Defining Zone Constraints"</a> .
<b>Inventory Status Transitions Tab</b>	
Inventory Status	<p>Enter the inventory status of the product being moved into the zone, if applicable.</p> <p>This defines the inventory status that needs to be modified when moved into this zone. This field can be left blank to indicate all inventory statuses.</p> <p>For more information, see <a href="#">Section 4.2.1, "Creating an Inventory Status"</a>.</p>
Supply Type	<p>This indicates the supply type associated with the inventory status.</p> <p>Supply type indicates classification of the inventory. This value is populated automatically by Yantra 7x WMS from the inventory status configuration.</p> <p>For more information about Inventory Supply Types, see <i>Yantra 7x Inventory Synchronization Configuration Guide</i>.</p>



**Table 3–6 Zone Details Window**

Field	Description
New Inventory Status	<p>Enter the inventory status applicable to the zone. This is mandatory if a translation is to be defined.</p> <p>This defines the new inventory status that replaces the current inventory status. This is used for the automatic conversion of the inventory status.</p> <p>For example, a warehouse with QC zone having 'Quality Held' inventory status and bulk storage zones having 'Normal' inventory status. All product putaway into QC zone has status converted to 'Quality Held' automatically. Inventory putaway into bulk storage has status converted to 'Normal' automatically.</p>
New Supply Type	<p>Indicates the supply type associated with the inventory status.</p> <p>The supply type indicates classification of the inventory. This value is populated automatically by Yantra 7x WMS from the inventory status configuration.</p> <p>For more information about Inventory Supply Types, see <i>Yantra 7x Inventory Synchronization Configuration Guide</i>.</p>
<b>Task Execution Preferences Tab</b>	
Force Location Scan On Visit	<p>Select if you want to force location scan on visit, when the user uses a mobile interface for task execution.</p> <p>This ensures that the location is scanned every time it is visited.</p>
Put On Variance Hold	<p>Select if you want the zone to be put on variance hold.</p> <p>This configures the freeze on variance feature for locations belonging to a zone. Only locations belonging to a zone with this flag checked will be put on variance hold if negative variance is found during a Count operation.</p>
Confirm Location Empty After Pick	<p>Select if you want the user to confirm that a location is empty after picking, when the user uses a mobile interface for task execution.</p> <p>This displays a dialog box to the user, whenever the system detects that a location is empty after picking. The user can confirm that the picked location is empty, and continue picking.</p>

### 3.5.2 Modifying a Zone

Once a zone has been set up, it can be modified.


To modify a zone:

1. From the tree in the application rules side panel, choose Warehouse Layout > Zones. The Zones window is displayed with the list of Zones.
2. Choose the Zone to be modified. Choose .
3. The Zone Details window appears. Enter information in the applicable fields. See [Table 3–6](#) for field value descriptions.
4. Choose .

A primary bulk zone containing inventory cannot be modified as an active zone. Any modifications to the inventory status transitions are applicable only to those transactions executed after the modification.

### 3.5.3 Deleting a Zone

To delete a zone:

1. From the tree in the application rules side panel, choose Warehouse Management > Warehouse Layout > Zones. The Zones window is displayed with the list of Zones.
2. Choose the Zone to be deleted.
3. Choose .

Zones containing locations cannot be deleted. To delete a zone containing locations, reassign all the locations assigned to the zone to another zone.

## 3.6 Defining Zone Constraints

A zone in a warehouse is created to represent a group of locations. Zones may also be dedicated to specific inventory attributes or item attributes.

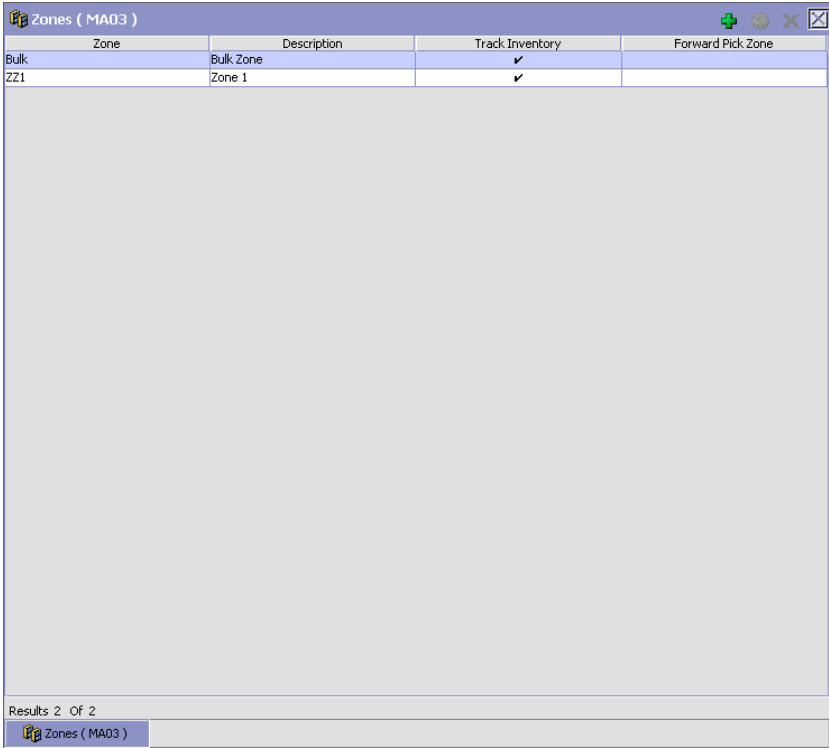
The constraints are specified at a item attribute, classification and enterprise level. The constraints specified applies to each individual location.

For example, a zone is restricted to a particular enterprise.


### 3.6.1 Setting Up Zone Constraints

To set up zone constraints:

1. From the tree in the application rules side panel, choose Warehouse Layout > Zones. The Zones window is displayed.



Zone	Description	Track Inventory	Forward Pick Zone
Bulk	Bulk Zone	✓	
ZZ1	Zone 1	✓	

2. In the Zones window, choose . The Zone Details window appears.
3. In the Zones Details window, choose the Zone Constraints Tab. The Zone Constraints Tab is displayed.

**Zone Details ( MA03 )**

Zone  Description

Building #  Primary Bulk Zone

☒ Track Inventory

☐ Forward Pick Zone

☒ Minimize No of Locations Per SKU

Track LPN

☒ Pallet ☒ Case

Max No of Locations Per SKU

Locations in this Zone store product in multiples of

**Zone Constraints** **Inventory Status Transitions** **Task Execution Preferences**

**Product Mixing in a Location** **Zone Dedications**

	Always Allow	Allow if License Plated	Never Allow
Mix Enterprise	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
Mix Segment	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
Mix Inventory Status	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
Mix Receipt	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>

Additional Constraints for Single SKU Putaway

	Always Allow	Allow if License Plated	Never Allow
Mix SKU	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
Mix FIFO	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
Mix COO	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
Mix Tag	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
Mix Ship by Date	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
Mix Product Class	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>

**Zones ( MA03 )** **Zone Details ( MA03 )**

Zone Constraints can be set up by:


- [Setting Up Product Mixing In a Location](#)
- [Setting Up Zone Dedication](#)

### 3.6.1.1 Setting Up Product Mixing In a Location

The constraints at a product level are specified here.

For example, for all locations in a zone products belonging to different COO or FIFO is not mixed.

To set up product mixing in a location:

1. In the Zone Constraints tab of Zone Details window, choose Product Mixing In a Location tab.
2. The Product Mixing In a Location tab is displayed.
3. Enter information in the applicable fields. Refer [Table 3–7](#) for field value descriptions.
4. Choose .

**Table 3–7 Product Mixing In a Location Tab**

Field	Description
<b>Product Mixing In a Location</b>	<p><b>Always Allow</b> – Select if products with differences in specified attribute can be mixed in a location for the zone.</p> <p><b>Allows if License Plated</b> – Select if products with differences in specified attribute can be mixed in a location for the zone, only if the inventory is license plated.</p> <p><b>Never Allow</b> – Select if products with differences in specified attribute is never mixed in a location for the zone.</p>
Mix Enterprise	Select if inventory belonging to different enterprises is mixed in a location within the zone.
Mix Segment	Select if inventory with different segment attributes is mixed in a location within the zone.
Mix Inventory Status	Select if inventory with different inventory statuses is mixed in a location within the zone.
Mix Receipt	Select if inventory with different receipt attributes is mixed in a location within the zone.
<b>Additional Constraints for Single-SKU Putaway</b>	
Mix SKU	Select if different SKUs is mixed in a location within the zone.



**Table 3–7 Product Mixing In a Location Tab**

Field	Description
Mix FIFO	Select if inventory that have different FIFO number is mixed in a location within the zone. FIFO numbers during receipt based on date/time for a period specified.
Mix COO	Select if inventory that have different countries of origin is mixed in a location within the zone.
Mix Tag	Select if inventory that have different tag attributes is mixed in a location within the zone.
Mix Ship by Date	Select if products having different ship by date can be mixed in a location within the zone. Use for time sensitive items.
Mix Product Class	Select if products that belong to different product classes can be mixed in a location within the zone.

It is recommended that:

1. For all storage locations, unless license plated you need to configure to not allow mixing of receipts.
2. If zones are used as inspection and staging locations, configure to allow mixing of receipts.
3. If you want to put away non-license plated products for the entire receipt, then at the receiving dock configure to not allow mixing of receipts.

### 3.6.1.2 Setting Up Zone Dedication

Enterprise level constraints for a zone are specified here.

For example, a zone is restricted to a certain enterprise.

Use the Zone Constraints set-up for:

- [Creating a Zone Dedication](#)
- [Modifying a Zone Dedication](#)
- [Deleting a Zone Dedication](#)

#### 3.6.1.2.1 Creating a Zone Dedication

To create a zone dedication:

1. In the Zone Constraints tab of Zone Details window, choose Zone Dedications tab.
2. The Zone Dedications tab is displayed.

The screenshot shows the 'Zone Details (MA03)' window. The 'Zone Constraints' tab is active, and the 'Zone Dedications' sub-tab is selected. The main area displays a table titled 'Zone dedicated to following Enterprises' with columns 'Enterprise Code' and 'Enterprise Description'. The table is currently empty, showing 'Results 0 Of 0'. The top section of the window contains various input fields and checkboxes for zone configuration, including 'Zone', 'Description', 'Building #', 'Primary Bulk Zone', 'Track Inventory', 'Forward Pick Zone', 'Minimize No of Locations Per SKU', 'Track LPN', 'Pallet', 'Case', and 'Max No of Locations Per SKU'.

3. Choose . The Zone Dedications window is displayed.
4. Enter information in the applicable fields. Refer [Table 3–8](#) for field value descriptions.
5. Choose .

Zone Dedications

Zone: Pack Zone Enterprise Code: SS-INV-ORG

Enterprise Description: SS Inventory Organization

Zone dedicated to following Item Classifications

Product Line	StorageType	Product Line
--------------	-------------	--------------

Results 0 Of 0

Zones ( TP ) Zone Details ( TP ) Zone Dedications

**Note:** The "Zone Dedicated To Following Item Classifications" Panel is not displayed by default during the creation process. It is only displayed when the following criteria are met:


- a) User has chosen Enterprise Code value in Zone Dedications screen, AND
  - b) Under the Classification Definition screen (in Yantra 7x Product Management Configurator) user has chosen: "Purpose Description = Storage Classification 1/Storage Classification 2/Storage Classification 3".
- For more information, see *Yantra 7x Product Management Configuration Guide*.

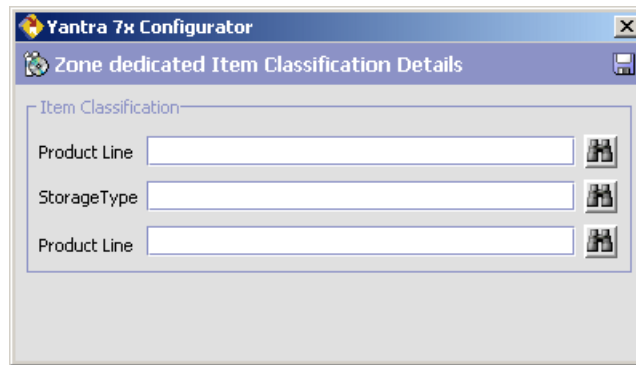
**Table 3–8 Zone Dedications Window**


Field	Description
Zone	Zone indicates the type of Zone. Zone is a system generated field and cannot be modified.
Enterprise Code	Choose the Enterprise whose constraints are being set.
Enterprise Description	The description is populated by the system.
Zone Dedicated To Following Item Classifications	<b>List of Zone Dedicated to Item Classification Details for the Zone are displayed. For example, Product Line and Storage type is shown below.</b>  For more information on setting up the Zone Dedicated Item Classifications, see <a href="#">Setting Up Zone Dedicated Item Classification Details</a> .
Product Line	Displays the product line item classification for the enterprise, if applicable.
Storage Type	Displays the storage type item classification for the enterprise, if applicable.

### Setting Up Zone Dedicated Item Classification Details


To set up zone dedicated item classification details:

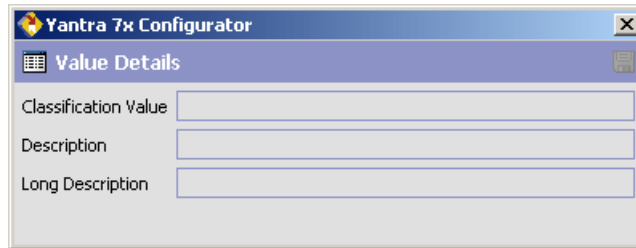
1. Choose  in the "Zone Dedicated To Following Item Classifications" panel of the Zone Dedications tab.
2. The Zone Dedicated Item Classification Details pop-up window appears. This contains the applicable item classifications as defined in the Classification Definition screen in Yantra 7x Product Management Configurator. For more information see *Yantra 7x Product Management Configuration Guide*.




3. Choose  for the relevant Item Classification. The Classification Values pop-up window appears.



4. In the Classification Values Window, choose . The Classification Value Details window appears.





5. Enter the Classification Value, Description, and Long Description in the applicable fields. For more information see *Yantra 7x Product Management Configuration Guide*.
6. Choose .

### 3.6.1.2.2 Modifying a Zone Dedication

Once a Zone dedication has been created, it can be modified.


To modify a zone dedication:

1. In the Zone Constraints tab of Zone Details window, choose Zone Dedications tab.
2. The Zone Dedications tab is displayed with the list of Item Classifications that the Zone is dedicated to.
3. Select the Zone Dedicated Item Classification to be modified.
4. Choose . Zone Dedicated Item Classification Details pop-up window appears.
5. Modify the relevant Zone Dedicated Item Classification as explained in [Setting Up Zone Dedicated Item Classification Details](#).
6. Choose .

### 3.6.1.2.3 Deleting a Zone Dedication

To delete a zone dedication:

1. In the Zone Constraints tab of Zone Details window, choose Zone Dedications tab.

2. The Zone Dedications tab is displayed with the list of Item Classifications that the Zone is dedicated to.
3. Select the Zone Dedicated Item Classification to be deleted.
4. Choose .

## 3.7 Defining Locations

A *Location* is the physical place where inventory is stored. Locations store inventory of different sizes and classifications.

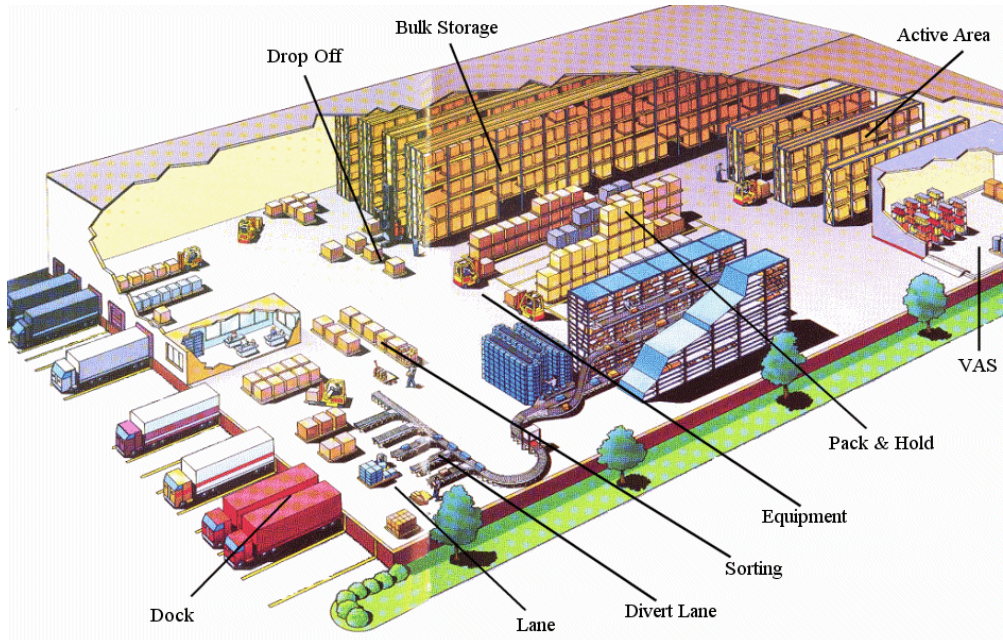
A location includes attributes like aisle number, bay number, and level number. A location is classified as in-transit location, regular location, virtual location, staging location, and dock location.

A location is always associated with a zone and a node. A location number uniquely identifies a location in the warehouse. Typically, a location number is a combination of the zone, aisle, bay, level and the slot it belongs to.

A location is classified as:

- **DOCK** - when it belongs to a dock zone.
- **INTRANSIT** - when it is a mobile location like that of the location associated to a forklift.
- **VIRTUAL** - when it is associated to inventory that is deemed as, not in the warehouse, like a bin location for variance quantities.
- **STAGING** - when it is an intermediate location for a task like drop-off or floor locations.
- **REGULAR** - all other permanent and static storage locations.

**Note:** If a location of type VIRTUAL is part of a Zone, it is recommended that locations of other types be avoided in the same zone.



Use Locations for:

- [Setting Up a Location](#)
- [Creating a New Location From an Existing Location](#)
- [Modifying a Location](#)
- [Deleting a Location](#)

### 3.7.1 Setting Up a Location

To set up a Location:

1. From the tree in the application rules side panel, choose Warehouse Layout > Locations. The Location Search window is displayed.



**Location Search ( DEFAULT / MA03 )**

Location  Zone

Aisle #

☐ Empty Location  
☐ No In Staging Location  
☐ No Out Staging Location  
☐ Freeze for Putaway  
☐ Freeze for Picking

Location Type

Size Code

In Staging Location

Out Staging Location

Velocity Code

Storage Code

Max Records

---

**Locations**

Location	Zone	Location Type	Storage Code	Putaway Sequence #	Picking Sequence #	Velocity Code
Results 0						

**Location Search ( DEFAULT / MA03 )**

- In the Locations panel, choose . The Location Details window is displayed.

**Location Details ( TP )**

**Location**  **Zone**

**Location Type**  **Aisle #**

**Level #**  **Bay #**

**Size Code**  **Bar Code**

**Primary Info** **Dedication**

**Picking**

☐ Freeze for Picking

**Sequence #**

**Staging Location**

**Putaway**

☐ Freeze for Putaway

**Sequence #**  **Staging Location**

**Velocity Code**  **Storage Code**

**Physical Co-ordinates**

**X Co-ordinate**

**Y Co-ordinate**

**Z Co-ordinate**

**Dock Scheduling Attributes**

☐ Dock Scheduling Required

**Choose Calendar**

**Dock Type**

☐ Inbound ☐ Outbound

**Transaction Attributes**

☐ Freeze On Variance

**Fill Code**

**Available Volume**   **Available Weight**

**Pending Volume**   **Pending Weight**

**Location Search ( TP )** **Location Details ( TP )**

**Note:** To create a new location from an existing location, see [Section 3.7.3, "Modifying a Location"](#) on page 76.

When creating a Location you must understand the following concepts:

- [Setting Up a Location's Primary Information](#)
- [Setting Up a Location's Dedication](#)

### 3.7.1.1 Setting Up a Location's Primary Information

To set up a Location's Primary Information:

1. In the Location Details window, choose the Primary Info tab.
2. Enter information in the applicable fields. See [Table 3–9](#) for field value descriptions.


**Table 3–9 Location Details Window**

Field	Description
Location	Enter the location number.
Zone	Choose the zone that the location belongs to.
Location Type	Choose the location type of the location. Valid values for location type are INTRANSIT (Mobile locations), STAGING (floor, drop-off), VIRTUAL, REGULAR, and DOCK.
Aisle #	Enter the aisle number of the location. An aisle is a row of locations.
Level #	Enter the level number of the location. A level number indicates the height of the location, in terms of levels.
Bay #	Enter the bay number of the location. A bay number indicates the horizontal slot in which the location exists.
Size Code	Choose the size code to identify size of the location. Location size code defines the capacity of a location. It is recommended that the most frequently used locations/docks/stations are set up with a size code that does not track capacity (i.e. infinite capacity locations). Performance of operations like receiving, putaway, shipping, and packing will be greatly enhanced if the locations/station locations are modelled as infinite. For more information about size codes, see <a href="#">Section 3.2.1, "Creating a Location Size Code"</a> on page 35.
Bar Code	Enter the value of barcode associated with the location. In some warehouses, for security purposes, the barcode associated with the location is different from the location number.

**Table 3–9 Location Details Window**

Field	Description
<b>Primary Information Tab</b>	
<b>Putaway</b>	
Freeze for Putaway	Select only if the putaway of inventory to the location is to be frozen.
Sequence #	Enter the putaway sequence number of the location. The putaway sequence attributed to each location in the warehouse determines the optimal method to navigate in the warehouse. The optimal path is evaluated in the numerical order of sequence numbers.
Staging Location	Choose the staging location for putaway to the location.  Staging location is the drop off location for inventory to be putaway into a location. Typically this is situated at the end of an aisle.  Note: A location should not be associated with a staging location that belongs to a different zone having inventory status transition.
Velocity Code	Choose the velocity code attributed to the location. The velocity code associates the location to a SKU's throughput. Typically, fast moving items are stored in the lower level locations, or locations reachable by hand, in the bulk zone.
Storage Code	Choose the storage code attributed to the location. Location storage code allows the warehouse to store items that match the storage profile of a location. For example, hazardous inflammable items need locations close to fire extinguishers.  For more information about Location Storage Code, see <a href="#">Section 3.3, "Defining Location Storage Codes"</a> on page 40.
<b>Picking</b>	
Freeze for Picking	Select only if the picking of inventory from the location is to be frozen.

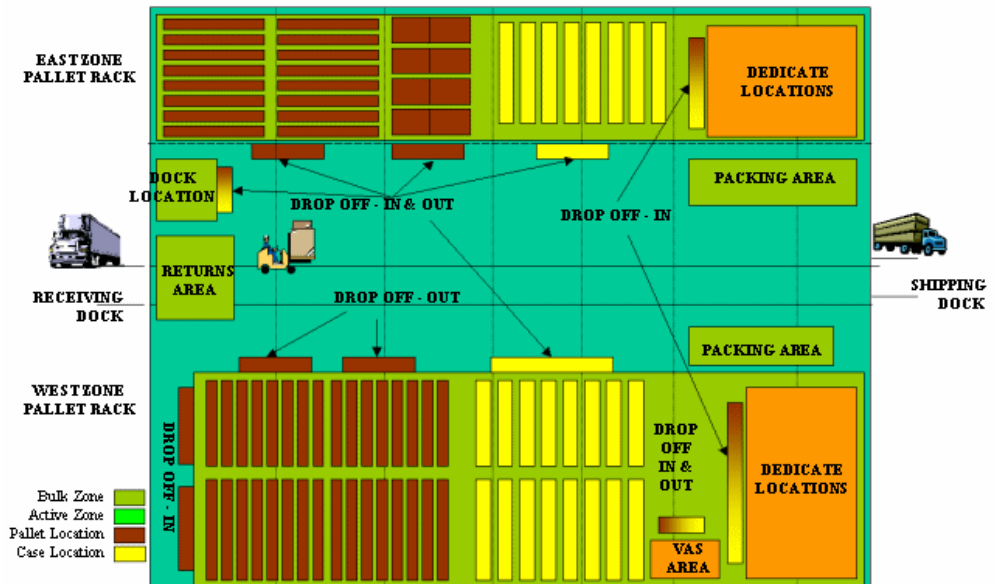
**Table 3–9 Location Details Window**

Field	Description
Sequence #	Enter the picking sequence number of the location.  The picking sequence attributed to each location in the warehouse determines the optimal method to navigate in the warehouse. The optimal path is evaluated in the numerical order of sequence numbers.
Staging Location	Choose the staging location for pick from the location.  Staging location is the drop off location where inventory that is picked or retrieved is dropped. Typically, this is situated at the end of an aisle that is close to the packing or shipping department.  Note: A location should not be associated with a staging location that belongs to a different zone having inventory status transition.
<b>Physical Co-ordinates</b>	
X Co-ordinate	X Co-ordinate for a location in the warehouse.
Y Co-ordinate	Y Co-ordinate for a location in the warehouse.
Z Co-ordinate	Z Co-ordinate for a location in the warehouse.
<b>Dock Scheduling Attributes</b>	These attributes display only if you choose the location type of a location as "DOCK".
Dock Scheduling Required	Check this box if appointments should be taken for the dock location.
Choose Calendar	Select the appropriate calendar for the dock. The working hours specified in this calendar are used when scheduling a dock.  Choose  to create a new calendar. For more information about creating a calendar, refer to the <i>Yantra 7x Platform Configuration Guide</i> .
<b>Dock Type</b>	
Inbound	Check this box if you want to use this dock location for scheduling inbound shipments.
Outbound	Check this box if you want to use this dock location for scheduling outbound shipments.
<b>Transaction Attributes</b>	These attributes are automatically populated by Yantra 7x WMS.

**Table 3–9 Location Details Window**

Field	Description
Freeze for Variance	This indicates if the location is frozen when a variance is detected during counting.  For more information about variance hold, see <a href="#">Section 4.12.1, "Defining Variance Hold Setup"</a> on page 218.
Fill Code	This indicates if the location is Empty, Partially Full or Full.  These values are automatically updated during inventory updates at the location.
Available Volume	This indicates unoccupied physical volume of the location.
Available Weight	This indicates the additional physical weight the location can hold.
Pending Volume	This indicates the volume of the stock expected to move into the location.  The pending volume is determined from tasks that are not completed at the location.
Pending Weight	This indicates the weight of the stock expected to move into the location.  The pending weight is determined from tasks that are not completed at the location.

**Note:** Aisle #, Level #, and Bay # are numeric fields, and are used in computing distances between locations. Putaway Algorithm is capable of suggesting nearest bulk location in the same aisle as a dedicated location if these parameters are configured appropriately. These are not mandatory if this feature is not used.



The locations in the warehouse that are temporarily not available, due to structural or procedural issues, are marked as frozen. The unavailable locations are marked frozen to stop any more tasks being executed at the location.

The picking sequence number of a location can be different from that of the putaway sequence number. For example, in a flow-rack, putaway is carried out to the back of a location, while picking is done from the front of the location.


### 3.7.1.2 Setting Up a Location's Dedication

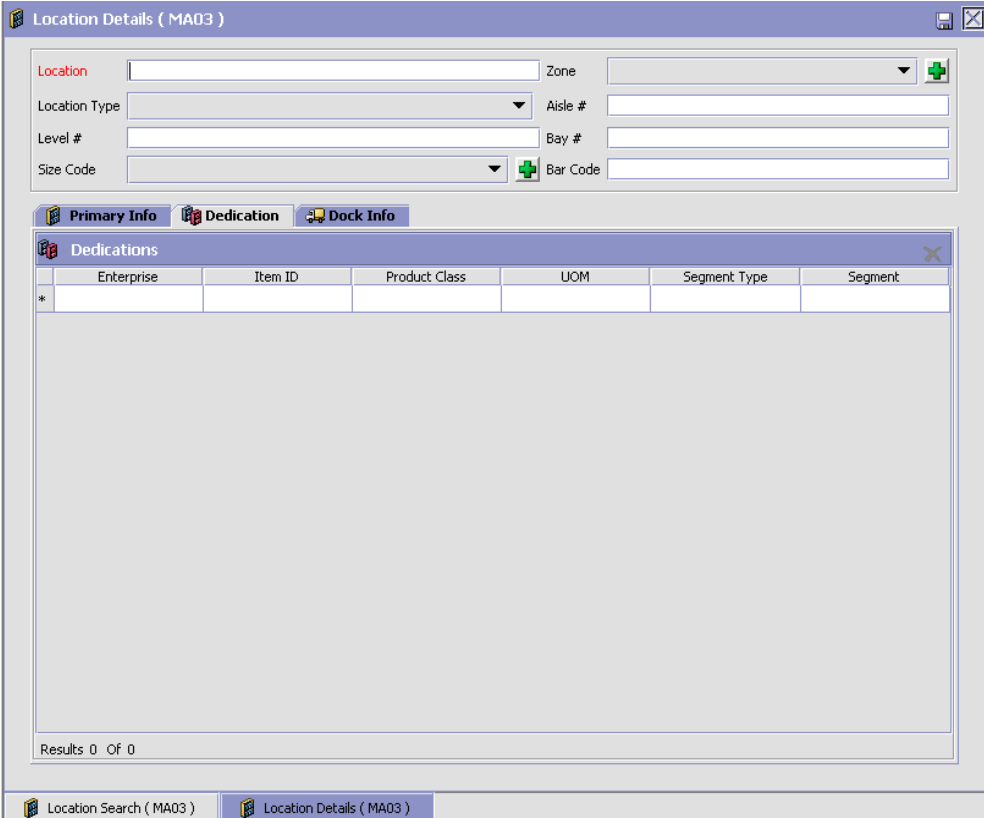
A *Dedicate Location* refers to a location that is reserved for a specific item. A location may be dedicated to a single SKU or multiple SKUs, or multiple locations may be dedicated to a single SKU.

**Note:** Only regular locations can be dedicated. Thus, the 'Dedication' panel will appear in the Location Details screen only when the Location Type selected is 'Regular'.

For more information about Dedicate Locations, see [Section 3.8, "Defining Dedicate Locations"](#) on page 78.

To set up a Location's Dedication:

1. In the Location Details window, choose the Dedication tab.
2. Enter information in the applicable fields. See [Table 3–10](#) for field value descriptions.
3. Choose .



The screenshot shows the 'Location Details (MA03)' window. At the top, there are input fields for 'Location', 'Zone', 'Location Type', 'Aisle #', 'Level #', 'Bay #', 'Size Code', and 'Bar Code'. Below these fields are three tabs: 'Primary Info', 'Dedication', and 'Dock Info'. The 'Dedication' tab is selected, showing a table with the following columns: Enterprise, Item ID, Product Class, UOM, Segment Type, and Segment. The table has one row with an asterisk (\*) in the first column. Below the table, it says 'Results: 0 Of 0'. At the bottom of the window, there are two buttons: 'Location Search (MA03)' and 'Location Details (MA03)'.

Enterprise	Item ID	Product Class	UOM	Segment Type	Segment
*					



**Table 3–10 Dedication Tab Window**

Field	Description
Enterprise	Choose the enterprise to which the location is dedicated.  This is used only if there are multiple enterprises in the warehouse and this location requires dedication to specific enterprises.
Item ID	Choose the item to which the location is to be dedicated.  This identifies the SKU to which the location is to be dedicated. If an enterprise is chosen, the list of valid items is populated automatically from the enterprise's catalog.
Product Class	Choose the product class to which the location is to be dedicated.  This is mandatory for dedicating a location to a SKU.
UOM	Choose the unit of measure of the SKU to which the location is to be dedicated.  This is mandatory for dedicating a location to a SKU.
Segment Type	Enter the segment type to which the location is to be dedicated.  This indicates an inventory category. Typical values are MTC – Made to Customer, and MTO – Made to Order.
Segment	Enter the specific segment value to which the location is to be dedicated.  A segment holds either the specific buyer or specific order number that requires dedication.

A location may be dedicated to multiple SKUs. Typically, a location is dedicated only to one SKU. A location being dedicated is either empty or already has inventory of the same SKU.

### 3.7.2 Creating a New Location From an Existing Location

To create a new location from an existing location:

1. From the tree in the application rules side panel, choose Warehouse Layout > Locations. The Location Search window is displayed.

Location Search ( DEFAULT / MA03 )

Location  Zone

Aisle #  Location Type

☐ Empty Location

☐ No In Staging Location

☐ No Out Staging Location

☐ Freeze for Putaway

☐ Freeze for Picking

Max Records

Size Code

In Staging Location

Out Staging Location

Velocity Code

Storage Code

**Locations**

Location	Zone	Location Type	Storage Code	Putaway Sequence #	Picking Sequence #	Velocity Code
Results 0						

Location Search ( DEFAULT / MA03 )

2. Enter the applicable search criteria, and choose . See [Table 3–11](#) for field value descriptions.
3. A list of Locations appears in the Locations panel. Select the Location to be copied from.
4. To create a new location from the selected Location, choose .
5. The Location Details window is displayed.
6. Enter information in the applicable fields.
7. Choose .

For more information about modifying fields in the Location Details window, see [Section 3.7.1.1, "Setting Up a Location's Primary Information"](#) on page 66 and [Section 3.7.1.2, "Setting Up a Location's Dedication"](#) on page 71.

**Table 3–11 Location Search Window**

Field	Description
Location	Enter the location number of location to be searched.
Zone	Choose the zone that the location to be searched belongs to.
Aisle	Enter the aisle number of location to be searched. An aisle is a row of locations. A location belongs to only one aisle.
Location Type	Choose the location type of location to be searched. Valid values for location type are INTRANSIT (Mobile locations), STAGING (floor, drop-off), VIRTUAL, REGULAR, and DOCK.
Empty Location	Select if the location to be searched is an empty location.  Note: Infinite locations are treated as partially full locations, irrespective of the locations being empty or partly full.
Size Code	Choose the location size code of location to be searched.  Location size code defines the capacity of a location. It is recommended that the most frequently used locations/docks/stations are set up with a size code that does not track capacity (i.e. infinite capacity locations). Performance of operations like receiving, putaway, shipping, and packing will be greatly enhanced if the locations/station locations are modelled as infinite.
No In Staging Location	Select if the location to be searched is not an in staging location.  In staging location is the drop off location for inventory to be putaway into a location. Typically this is situated at the end of an aisle.





**Table 3–11 Location Search Window**

Field	Description
In Staging Location	Choose the in staging location to be searched. In staging location is the drop off location for inventory to be putaway into a location. Typically this is situated at the end of an aisle.
No Out Staging Location	Select if the location to be searched is not an out staging location. Staging location is the drop off location where inventory that is picked or retrieved is dropped. Typically this is situated at the end of an aisle that is close to the packing or shipping department.
Out Staging Location	Choose the out staging location to be searched. Staging location is the drop off location where inventory that is picked or retrieved is dropped. Typically this is situated at the end of an aisle that is close to the packing or shipping department.
Freeze for Putaway	Select if putaway of inventory to the location on search is frozen.
Velocity Code	Choose the velocity code of location to be searched. The velocity code associates the location to a SKU's throughput. Typically, fast moving items are stored in the lower level locations, or locations reachable by hand, in the bulk zone.
Freeze for Picking	Select if picking of inventory from the location on search is frozen.
Storage Code	Choose storage code of location to be searched. Location storage code allows the warehouse to store items that match the storage profile of a location. For example, hazardous inflammable items need locations close to fire extinguishers.
Max Records	Enter maximum number of search results to be displayed at a time.

### 3.7.3 Modifying a Location

Once a Location has been set up, it can be modified.

To modify a location:

1. From the tree in the application rules side panel, choose Warehouse Layout > Locations. The Location Search window is displayed.
2. Enter the applicable search criteria. and choose . See [Table 3–11](#) for field value descriptions.
3. A list of Locations appears in the Locations panel. Select the Location to be modified.
4. To modify the selected Location, choose .
5. To create and modify a copy of the selected Location, choose .
6. The Location Details window is displayed.
7. Enter information in the applicable fields.
8. Choose .



For more information about modifying fields in the Location Details window, see [Section 3.7.1.1, "Setting Up a Location's Primary Information"](#) on page 66 and [Section 3.7.1.2, "Setting Up a Location's Dedication"](#) on page 71.

The zone of a location containing inventory cannot be modified. Also, the size code of a location containing inventory cannot be modified from INFINITE to a FINITE location size.

Location defined with location type STAGING is not modifiable to any other location type, if there is a corresponding REGULAR location that is using it as a staging location for putaway or retrieval.

### 3.7.4 Deleting a Location

To delete a location:

1. From the tree in the application rules side panel, choose Warehouse Layout > Locations. The Location Search window is displayed.
2. Enter the applicable search criteria. and choose . See [Table 3–11](#) for field value descriptions.
3. A list of Locations appears in the Locations panel. Select the Location to be deleted.
4. Choose .

A location containing inventory cannot be deleted. Also, a location that has equipment associated with it cannot be deleted.

## 3.8 Defining Dedicate Locations

A *Dedicate Location* refers to a location that is reserved for a specific item. A location is dedicated to a single SKU or multiple SKUs, while multiple locations may be dedicated to a single SKU.

You may use the dedicate location set-up to dedicate a location for an item, or to assign an item to an existing location. You may also use the dedicate location set-up to remove an existing dedication.

Use Dedicate Locations for:

- [Setting Up a Dedicate Location](#)
- [Deleting a Dedicate Location](#)

### 3.8.1 Setting Up a Dedicate Location

To set up a Dedicate Location:

1. From the tree in the application rules side panel, choose Warehouse Layout > Dedicate Locations. The Dedication Search window is displayed.

**Dedication Search ( MA03 )**

Location  Enterprise

Enterprise Attributes

Item ID  Product Class

UOM

Segment Type  Segment


Max Records

**Dedications**

	Location	Enterprise	Item ID	Product Class	UOM	Segment Type	Segment
*							

Results 0 Of 0

**Dedication Search ( MA03 )**

2. Enter information in the applicable fields. See [Table 3–12](#) for field value descriptions.
3. Choose .

**Table 3–12 Dedications Search Window**

Field	Description
Location	Choose location to be dedicated.
Enterprise	<p>Choose the enterprise to which the location is to be dedicated.</p> <p>This is used only if there are multiple enterprises in the warehouse and this location requires dedication to specific enterprises.</p>

**Table 3–12 Dedications Search Window**

Field	Description
<b>Enterprise Attributes</b>	
Item ID	Choose the item to which the location is to be dedicated.  This identifies the SKU to which the location is to be dedicated. If an enterprise is chosen, the list of valid items is populated automatically from the enterprise's catalog.
Product Class	Choose the product class to which the location is to be dedicated.  This is mandatory for dedicating the location to a SKU.
UOM	Choose the unit of measure of the SKU to which the location is to be dedicated.  This is mandatory for dedicating the location to a SKU.
Segment Type	Enter the segment type to which the location is to be dedicated.  This indicates an inventory category. Typical values are MTC – Made to Customer, and MTO – Made to Order.
Segment #	Enter the specific segment value to which the location is to be dedicated.  A segment holds either the specific buyer or specific order number that requires dedication.



A location may be dedicated to multiple SKUs. Typically, a location is dedicated only to one SKU. A location being dedicated is either empty or already has inventory of the same SKU.

### 3.8.2 Deleting a Dedicate Location

To delete a dedicate location:

1. From the tree in the application rules side panel, choose Warehouse Layout > Dedicate Locations. The Dedication Search window is displayed.
2. In the Dedication Search window, enter applicable search criteria. See [Table 3–12](#) for field value descriptions.



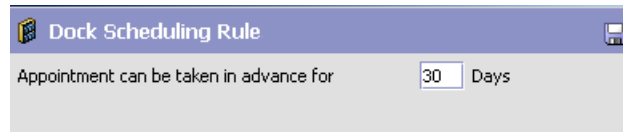
3. Choose . A list of Dedicate Locations is displayed in the Dedications panel.
4. Select the Dedicate Location to be deleted.
5. Choose .


## 3.9 Defining Dock Scheduling Rule

You can schedule a dock in a warehouse and take appointments for loading or unloading shipments.

To define a dock scheduling rule:

1. From the tree in the application rules side panel, choose Warehouse Layout > Dock Scheduling Rule. The Dock Scheduling Rule window is displayed.



2. Enter how many days in advance you want to take a dock appointment.
3. Choose .

## 3.10 Defining Equipment

In a warehouse, different types of equipment are used to execute various tasks. Examples of various types of equipment used in a warehouse include sorter, tote, forklift, and pallet jack.

An individual equipment is identified through an equipment ID, and categorized into one of the Equipment Types used in that warehouse.

The equipment used in a warehouse may be stationary (for example, a sorter) or mobile (for example, Pallet Jack, Fork Lift, or Cart). In Yantra 7x equipment are modeled in one of the following ways:

### 1. As a Set of Locations

The equipment that are stationary are typically modeled as locations. Also certain mobile equipment that do not need to be tracked in inventory like Fork Lifts or Pallet Jacks are modeled as Locations.

### 2. As a License Plate

Mobile equipment that are physically moved around (between different physical locations) and are required to be tracked at their current location, are modeled as license plates. Examples of such equipment include Carts and Totes.

Equipment modeled as license plates could be modeled as a case or pallet depending on their size. For example, carts would be modeled as Pallets, while totes would typically be modeled as cases.

Equipment modeled as license plates could have slots in them of different sizes for carrying products. This information of slots is used while batching tasks that require these equipment for their execution. For example, Cart manifest batch.

Use Equipment for:

- [Setting Up an Equipment Type](#)
- [Setting Up a Task Type Association](#)
- [Setting Up a Print Format Preference](#)
- [Setting Up an Equipment ID](#)
- [Setting Up an Equipment Device Association](#)

## 3.10.1 Setting Up an Equipment Type

An equipment group is tracked as an equipment type. An equipment type defines the characteristics of the group. For example, if a warehouse uses a two lane inbound sorter and a sixteen lane outbound sorter, these are modeled as two distinct equipment types.

There are standard equipment types that are supplied with Yantra 7x WMS.

Use Equipment Types set-up for:

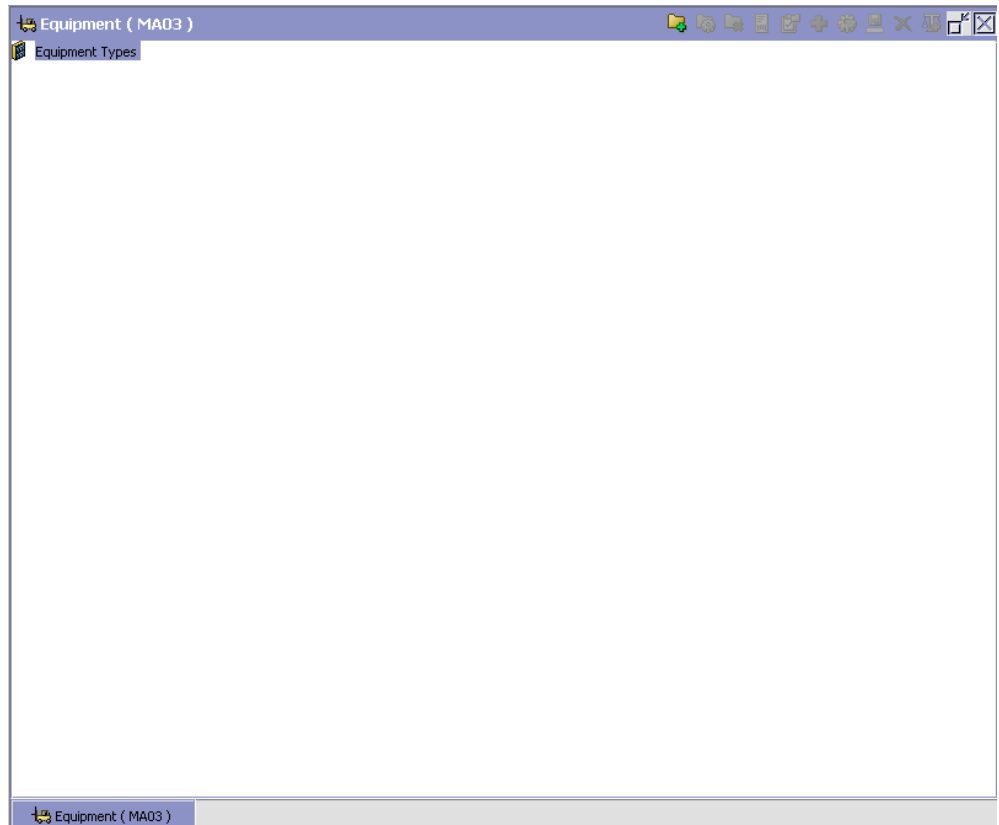
- [Creating an Equipment Type](#)


- [Modifying an Equipment Type](#)
- [Deleting an Equipment Type](#)


### 3.10.1.1 Creating an Equipment Type

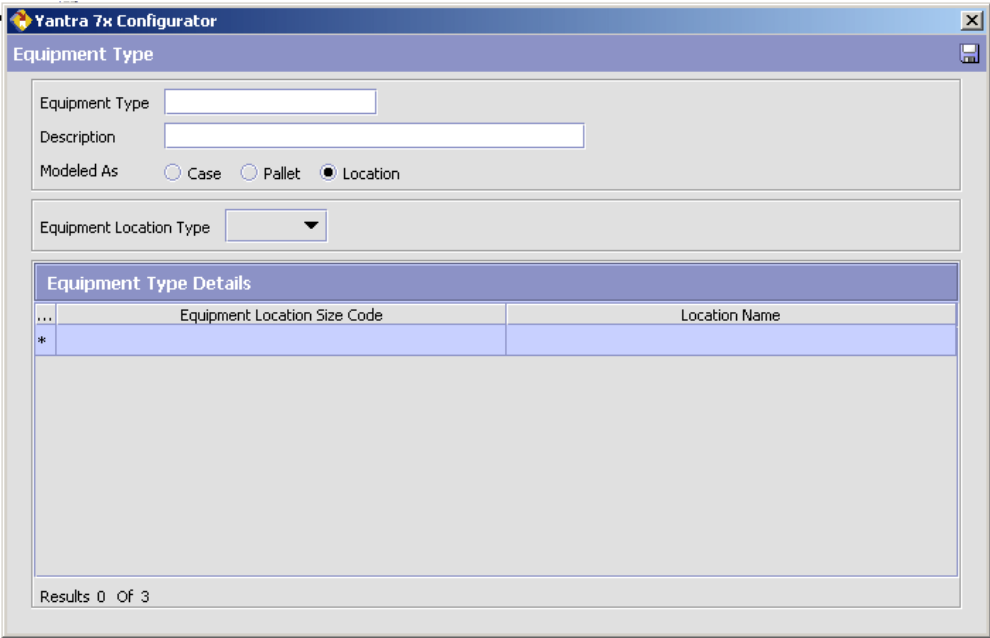
To create an equipment type:

1. From the tree in the application rules side panel, choose Warehouse Layout > Equipment. The Equipment window is displayed.



2. In the Equipment window, choose . The Equipment Type pop-up window is displayed.
3. Enter information in the applicable fields. See [Table 3–13](#) for field value descriptions.

4. Choose .



Yantra 7x Configurator

Equipment Type

Equipment Type

Description

Modeled As ☐ Case ☐ Pallet ☒ Location

Equipment Location Type

Equipment Type Details

...	Equipment Location Size Code	Location Name
*		

Results 0 Of 3

Table 3–13 Equipment Type Details Window

Field	Description
Equipment Type	Enter the name for the Equipment Type. This helps in identifying the type of equipment. For example, equipment type include Forklift, Grabtruck, Inbound Sorter.
Description	Enter a brief description for the equipment type.
Modeled as	Choose what the equipment is ideally represented by. Valid values are Case, Pallet and Location. Examples for each type are as below: 'Location' – Sorter or Forklift. 'Pallet' – Cart used for picking. 'Case' – Tote used for picking.



**Table 3–13 Equipment Type Details Window**

Field	Description
Equipment Location Type	Choose the location type associated with the equipment.  A sorter modeled as a 'Location' is associated with 'STAGING' location type. A forklift modeled as a 'Location' is associated with 'INTRANSIT' location type.
<b>Equipment Type Details</b>	
Equipment Location Size Code	Choose the location size code that characterizes the equipment or a slot in the equipment.  For a cart, each slot is represented by a size code. For a sorter, each chute is represented by a size code.  For more information about setting up a location size code, see <a href="#">Section 3.2.1, "Creating a Location Size Code"</a> on page 35.
Location Name	Enter the name of the location associated to the location size code.  For a cart, each slot is named or numbered. The values of the slots are used in RF and in prints to represent where the inventory must be placed.  For a sorter, each chute is given a location name.

### 3.10.1.2 Modifying an Equipment Type


Once an equipment type has been created, it can be modified.

To modify an equipment type:

1. From the tree in the application rules side panel, choose Warehouse Layout > Equipment. The Equipment window is displayed with the list of Equipment Types.
2. Choose the Equipment Type to be modified.
3. Choose . The Equipment Type pop-up window is displayed.
4. Enter information in the applicable fields. See [Table 3–13](#) for field value descriptions.
5. Choose .

### 3.10.1.3 Deleting an Equipment Type

To delete an equipment type:

1. From the tree in the application rules side panel, choose Warehouse Layout > Equipment. The Equipment window is displayed with the list of Equipment Types.
2. Choose the Equipment Type to be deleted.
3. Choose .





## 3.10.2 Setting Up a Task Type Association

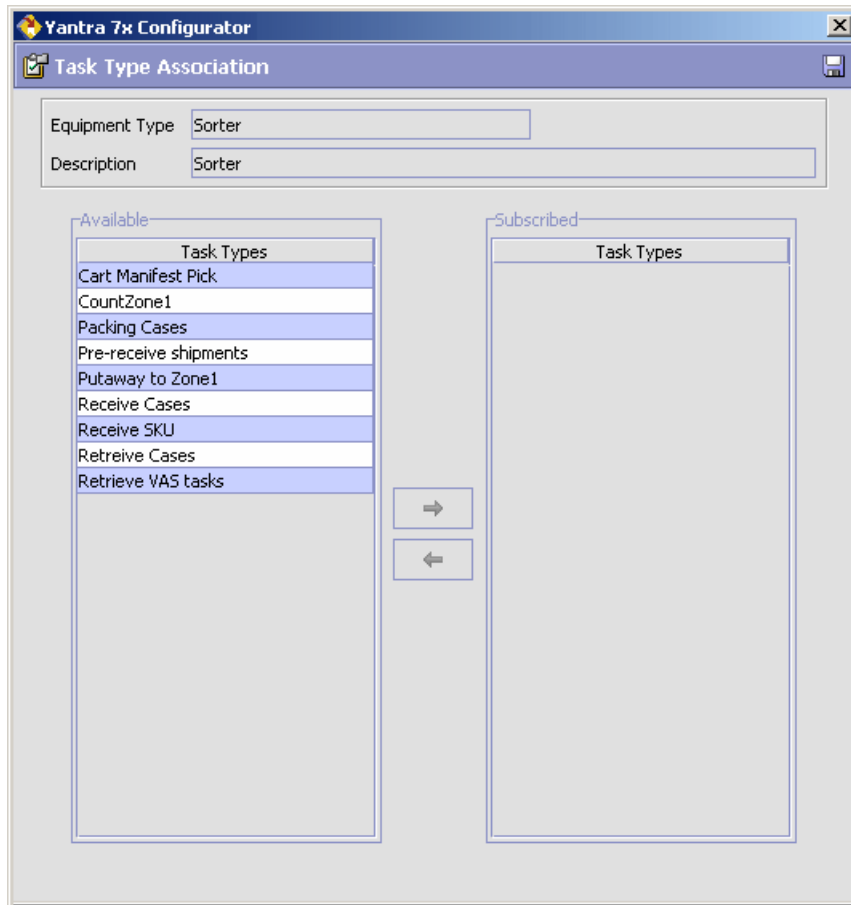
Equipment is limited to the processes that it can perform. For example, a cart can execute only pick tasks that are related to a cart or a forklift is used only for putaway and retrieval from bulk zones.

Each task in the system is associated with a source and target zone. The task type created using a zone, is associated with the equipment that can execute the task.

For example, put away of pallets to bulk zone requires a forklift with an RF scanner for scanning data.

To set up a task type association:

1. From the tree in the application rules side panel, choose Warehouse Layout > Equipment. The Equipment window is displayed with the list of Equipment Types.
2. Select the Equipment Type for which Task Type is to be associated.
3. Choose . The Task Type Association pop-up window appears.
4. Choose  to add a task type to the Subscribed Task Types list, from the Available Task Types list.
5. Choose  to remove a task type from the Subscribed Task Types list, and move it back to the Available Task Types list.
6. See [Table 3–14](#) for field value descriptions.
7. Choose .



**Table 3–14 Equipment Type Task Type Association Pop-up Window**



Field	Description
Equipment Type	This indicates the equipment type.
Description	This provides a brief description for the equipment type.
Available Task Types	This indicates the list of task types that are available for the equipment type.
Subscribed Task Types	This indicates the list of task types that are subscribed for the equipment type.

### 3.10.3 Setting Up a Print Format Preference

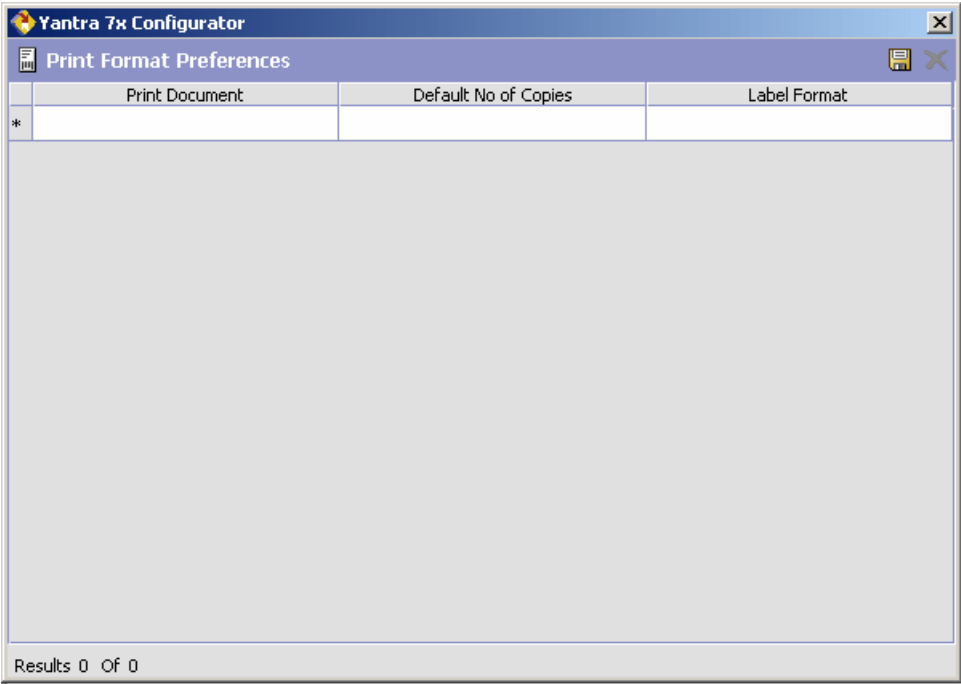
Equipment like sorter or forklifts can have devices attached to them that print labels or documents. The preferences for these print labels or documents are configured here.

For example, a pack station associated to a printer can print packing slips after the last carton has been packed.

To set up a print format preference:


1. From the tree in the application rules side panel, choose Warehouse Layout > Equipment. The Equipment window is displayed with the list of Equipment Types.
2. Select the Equipment Type for which the Print Format Preference is to be set up.
3. Choose . The Print Format Preferences pop-up window appears.
4. Enter information in the applicable fields. See [Table 3–15](#) for field value descriptions.
5. Choose .





**Table 3–15** Equipment Type Print Format Preferences Pop-up Window

Field	Description
Print Document	Choose the relevant document to be printed.
Default No. of Copies	Enter the number of copies to be printed.
Label Format	Choose the format of the label associated with the document.

**Note:** Choose  in the Print Format Preferences pop-up window to delete a print format preference (Print Document, Default Number of Copies, and Label Format).

### 3.10.4 Setting Up an Equipment ID



Individual equipment in the warehouse is represented by an ID and is associated with an equipment type. For example, inbound sorter, outbound sorter and a cart.

Use Equipment set-up for:

- [Creating an Equipment ID](#)
- [Creating a New Equipment ID From an Existing Equipment ID](#)
- [Modifying an Equipment ID](#)
- [Deleting an Equipment ID](#)

#### 3.10.4.1 Creating an Equipment ID

To create an equipment id:

1. From the tree in the application rules side panel, choose Warehouse Layout > Equipment. The Equipment window is displayed with the list of Equipment Types.
2. Choose the Equipment Type for which the Equipment is to be created.
3. Choose . The Equipment pop-up window appears.
4. Enter information in the applicable fields. See [Table 3–16](#) for field value descriptions.
5. Choose .

**Yantra 7x Configurator**

**Equipment**

Equipment Type: ForkLift

Equipment ID:

Equipment Details		
Equipment Location Size Code	Location Name	Location
INFINITE	ForkliftLoc	

Results 0 Of 1

**Table 3–16 Equipment Pop-up Window**



Field	Description
Equipment Type	This indicates the equipment type for which the equipment is being created.
Equipment ID	Enter the equipment ID for the equipment being created.
<b>Equipment Details</b>	
Equipment Location Size Code	Indicates the location size code of the equipment. The location size codes valid for the equipment type are listed here.

**Table 3–16 Equipment Pop-up Window**

Field	Description
Location Name	Indicates the name of the location of the equipment. The location names valid for the equipment type are listed here.
Location	Enter the name of the location corresponding to the location name.  This value is required only for Equipment Types that are modeled as a 'Location'. For example, each chute of a sorter represents a location in the system.

### 3.10.4.2 Creating a New Equipment ID From an Existing Equipment ID

To create a new equipment ID from an existing equipment ID:



1. From the tree in the application rules side panel, choose Warehouse Layout > Equipment. The Equipment window is displayed with the list of Equipment Types.
2. Choose the Equipment Type for which the Equipment is to be created.
3. From the Equipment Type tree, select the Equipment to be copied to create new Equipment.
4. Choose . The Equipment pop-up window is displayed.
5. Enter information in the applicable fields. See [Table 3–16](#) for field value descriptions.
6. Choose .

### 3.10.4.3 Modifying an Equipment ID

Once an Equipment ID has been created, it can be modified.


To modify an equipment ID:

1. From the tree in the application rules side panel, choose Warehouse Layout > Equipment. The Equipment window is displayed with the list of Equipment Types.
2. Choose the Equipment Type whose Equipment is to be modified.
3. From the Equipment Type tree, select the Equipment to be modified.

4. Choose . The Equipment pop-up window appears.
5. Enter information in the applicable fields. See [Table 3–16](#) for field value descriptions.
6. Choose .

#### 3.10.4.4 Deleting an Equipment ID

To delete an equipment ID:



1. From the tree in the application rules side panel, choose Warehouse Layout > Equipment. The Equipment window is displayed with the list of Equipment Types.
2. Choose the Equipment Type whose Equipment is to be deleted.
3. From the Equipment Type tree, select the Equipment to be deleted.
4. Choose .

### 3.10.5 Setting Up an Equipment Device Association

Equipment in the warehouse have devices attached to them like RF scanners or printers. These devices are associated with equipment here.

For example, a forklift has an RF scanner associated with it.

To set up an equipment device association:

1. From the tree in the application rules side panel, choose Warehouse Layout > Equipment. The Equipment window is displayed with the list of Equipment Types.
2. From the Equipment Type tree, select the relevant Equipment to be associated with a Device.
3. Choose . The Equipment Device Association pop-up window appears.
4. Enter information in the applicable fields. See [Table 3–17](#) for field value descriptions.
5. Choose .

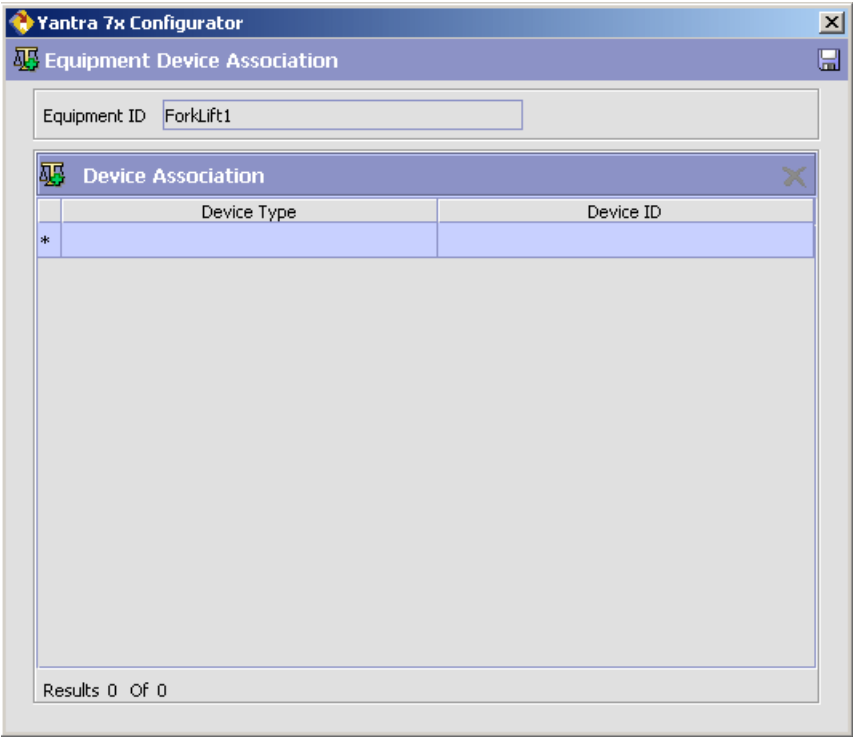



Table 3–17 Equipment Device Association Pop-up Window

Field	Description
Equipment ID	Indicates the equipment ID of the equipment type being associated.
<b>Device Association</b>	
Device Type	Choose the device type of the device to be associated to the equipment. For more information about a device type, see <a href="#">Section 13.1.1, "Defining a Device Type"</a> on page 941.
Device ID	Choose the device ID of the device to be associated to the equipment.

---

**Note:** Choose  in the Equipment Device Association pop-up window to delete a device association (Device Type and Device ID).

---

## 3.11 Defining Stations

There are activities in a warehouse that are performed from stationary locations. Some examples include Packing, VAS, Receiving and Manifesting.

Each Station is associated with devices and labels or documents that are printed on demand or automatically.

Use station for:

- [Setting Up a Station Type](#)
- [Setting Up a Task Type Association](#)
- [Setting Up a Print Format Preference](#)
- [Setting Up a Station ID](#)
- [Setting Up a Station Device Association](#)

### 3.11.1 Setting Up a Station Type

Stations are grouped by their activity into Station Types. Typical station types in a warehouse include Receiving Station or Manifesting Station.

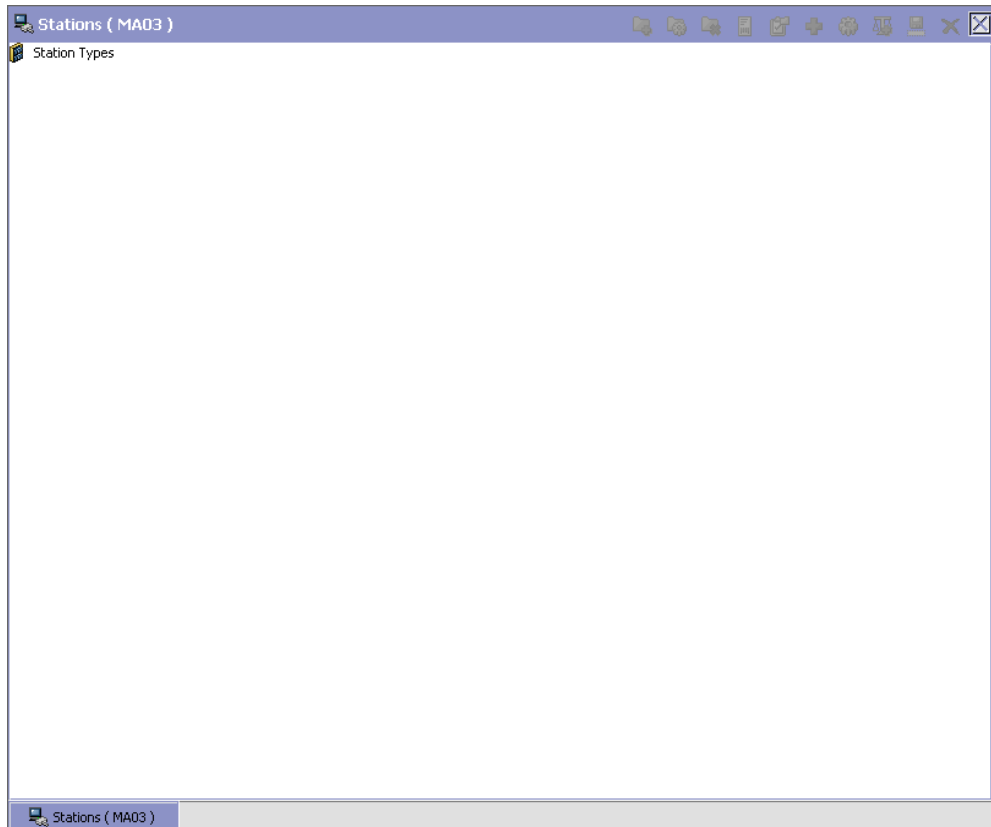
Use Station Types set-up for:



- [Creating a Station Type](#)
- [Modifying a Station Type](#)
- [Deleting a Station Type](#)

#### 3.11.1.1 Creating a Station Type

To create a station type:

1. From the tree in the application rules side panel, choose Warehouse Layout > Stations. The Stations window is displayed.



2. In the Stations window, choose . The Station Type pop-up window appears.
3. Enter information in the applicable fields. See [Table 3–18](#) for field value descriptions.
4. Choose .



Yantra 7x Configurator

Station Type

Station Type

Description

Station Location Type

Station Type Details

	Station Location Size Code	Location Name
*		

Results 0 Of 0

**Table 3–18 Station Type Pop-up Window**

Field	Description
Station Type	Enter a name for the Station Type. This helps in identifying the type of station. For example, Receiving Station or Pack Station.
Description	Enter a brief description for the station type.
Station Location Type	Choose the location type that the station is associated with. All stations locations are typically modeled as 'STAGING'.
Station Type Details	

**Table 3–18 Station Type Pop-up Window**



Field	Description
Station Location Size Code	Choose the location size code that characterizes the station.  Typically chosen as 'INFINITE' location size.  For more information about location size codes, see <a href="#">Section 3.2.1, "Creating a Location Size Code"</a> on page 35.
Location Name	Enter the name of the location associated to the location size code.

**Note:** Set the most frequently used locations/docks/stations with a size code that does not track capacity (i.e. infinite capacity locations). Performance of operations like receiving, putaway, shipping, and packing will be greatly enhanced if the locations/station locations are modelled as infinite.

### 3.11.1.2 Modifying a Station Type


Once a Station Type has been created, it can be modified.

To modify a station type:

1. From the tree in the application rules side panel, choose Warehouse Layout > Stations. The Stations window is displayed with the list of Station Types.
2. Choose the Station Type to be modified.
3. Choose . The Station Type pop-up window is displayed.
4. Enter information in the applicable fields. See [Table 3–18](#) for field value descriptions.
5. Choose .

### 3.11.1.3 Deleting a Station Type





To delete a station type:

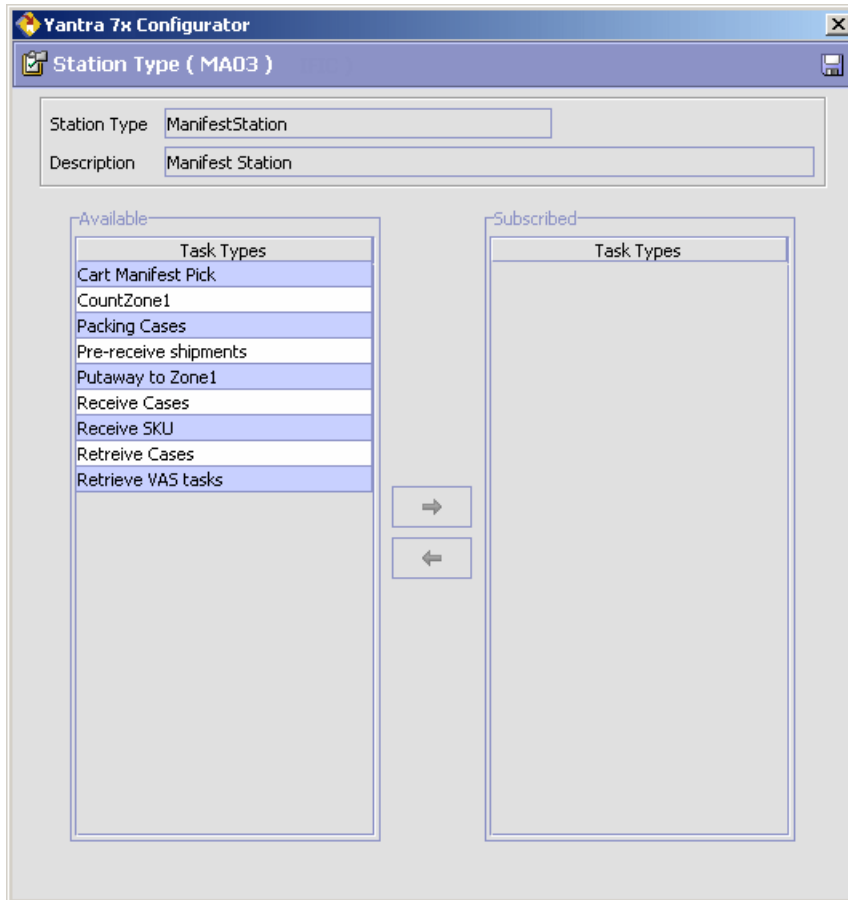
1. From the tree in the application rules side panel, choose Warehouse Layout > Stations. The Stations window is displayed with the list of Station Types.
2. Choose the Station Type to be deleted.
3. Choose .

### 3.11.2 Setting Up a Task Type Association

The type of work performed characterizes a station. For example, receiving station is associated with receiving task types.

To set up a task type association:

1. From the tree in the application rules side panel, choose Warehouse Layout > Stations. The Stations window is displayed with the list of Station Types.
2. Select the Station Type for which Task Type is to be associated.
3. Choose . The Task Type Association pop-up window appears.
4. Choose  to add a task type to the Subscribed Task Types list, from the Available Task Types list.
5. Choose  to remove a task type from the Subscribed Task Types list, and move it back to the Available Task Types list.
6. See [Table 3–19](#) for field value descriptions.
7. Choose .



**Table 3–19 Station Type Task Type Association Pop-up Window**



Field	Description
Station Type	This indicates the station type being associated with the tasks.
Description	This provides a brief description for the station type.
Available Task Types	This indicates the list of task types that are available to be associated to the station type.
Subscribed Task Types	This indicates the list of task types that are subscribed to the station type.

### 3.11.3 Setting Up a Print Format Preference

A task being performed at a station may require labels or documentation to be printed. The labels or documents that are required are identified at each station.

For example, packing station requires packing slip to be printed.

To set up a print format preference:

1. From the tree in the application rules side panel, choose Warehouse Layout > Stations. The Stations window is displayed with the list of Station Types.
2. Select the Station Type for which the Print Format Preference is to be set up.
3. Choose . The Print Format Preferences pop-up window appears.
4. Enter information in the applicable fields. Refer [Table 3–20](#) for field value descriptions.
5. Choose .

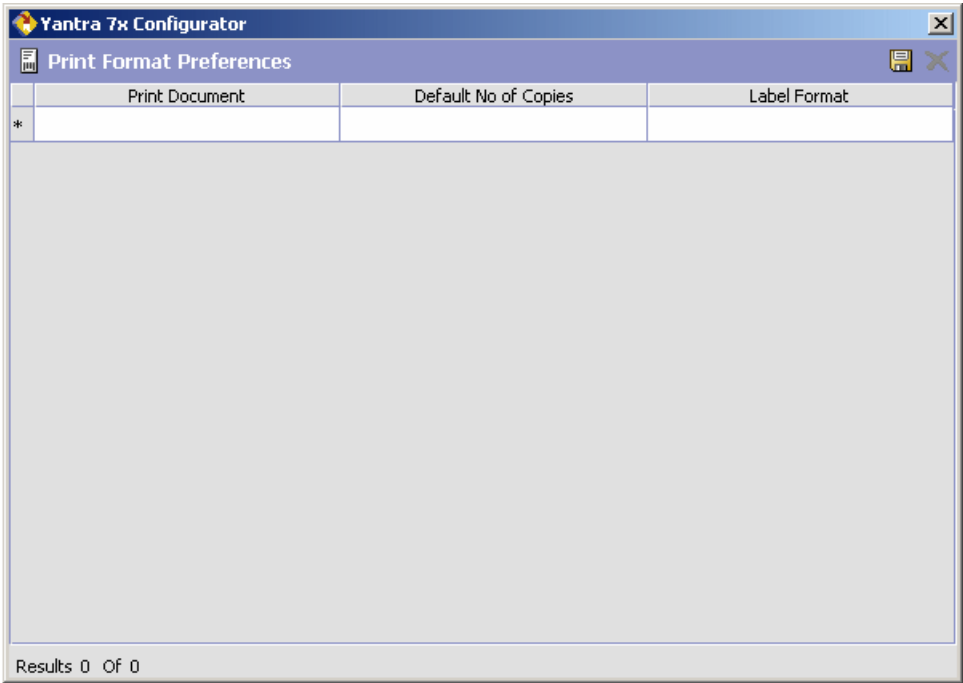



Table 3–20 Station Type Print Format Preferences Pop-up Window

Field	Description
Print Document	Choose the relevant document to be printed.
Default No. of Copies	Enter the number of copies to be printed by default.
Label Format	Choose the format of the label for the print document.

**Note:** Choose  in the Print Format Preferences pop-up window to delete a print format preference (Print Document, Default Number of Copies, and Label Format).

3.11.4 Setting Up a Station ID

Individual stations are represented as Station Ids associated with a Station Type.



For example, two stations used for manifesting purposes.

Use Stations set-up for:

- [Creating a Station ID](#)
- [Creating a New Station ID from a Station ID](#)
- [Modifying a Station ID](#)
- [Deleting a Station ID](#)

#### 3.11.4.1 Creating a Station ID

To create a station ID:

1. From the tree in the application rules side panel, choose Warehouse Layout > Stations. The Stations window is displayed with the list of Station Types.
2. Choose the Station Type for which the Station is to be created.
3. Choose . The Station pop-up window appears.
4. Enter information in the applicable fields. See [Table 3–21](#) for field value descriptions.
5. Choose .

Yantra 7x Configurator

Station

Station Type

MANIFEST

Station Id

Station Details

Station Location Size Code	Location Name	Location
INFINITE	MANIFESTSTATION	

Results 0 Of 1



Table 3–21 Station Pop-up Window

Field	Description
Station Type	This indicates the station type for which the station is being created.
Station ID	Enter the station id for the station being created.
Station Details	
Station Location Size Code	Indicates the location size code applicable to the station.
Location Name	Indicates the name of the location applicable to the station.
Location	Enter the name of the location to be used for the station.

3.11.4.2 Creating a New Station ID from a Station ID

To create a new station ID from a station ID:





1. From the tree in the application rules side panel, choose Warehouse Layout > Stations. The Stations window is displayed with the list of Station Types.
2. Choose the Station Type for which the Station is to be created.
3. From the Station Type tree, select the Station to be copied to create new Station.
4. Choose . The Station pop-up window is displayed.
5. Enter information in the applicable fields. See [Table 3–21](#) for field value descriptions.
6. Choose .

### 3.11.4.3 Modifying a Station ID


Once a Station ID has been created, it can be modified.

To modify a station ID:

1. From the tree in the application rules side panel, choose Warehouse Layout > Stations. The Stations window is displayed with the list of Station Types.
2. Choose the Station Type whose Station is to be modified.
3. From the Station Type tree, select the Station to be modified.
4. Choose . The Station pop-up window appears.
5. Enter information in the applicable fields. See [Table 3–21](#) for field value descriptions.
6. Choose .

### 3.11.4.4 Deleting a Station ID

To delete a station ID:



1. From the tree in the application rules side panel, choose Warehouse Layout > Stations. The Stations window is displayed with the list of Station Types.
2. Choose the Station Type whose Station is to be deleted.
3. From the Station Type tree, select the Station to be deleted.
4. Choose .

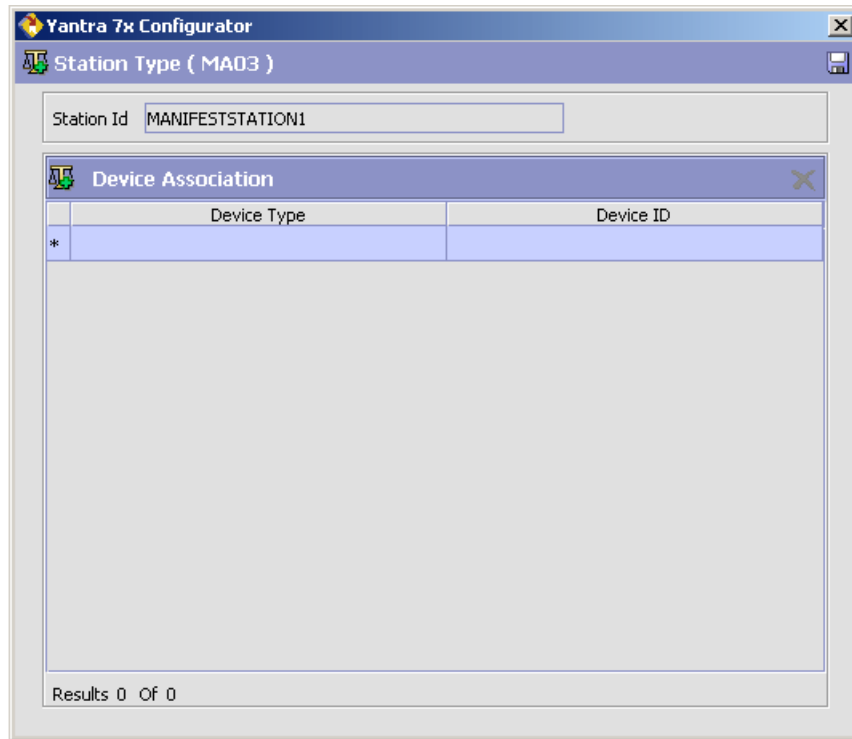
### 3.11.5 Setting Up a Station Device Association

A Station may have one or more devices associated with it. Station Device Association defines this association between a station and devices.

For example, a packing station can have a scanner and printer associated with it.


To set up a station device association:

1. From the tree in the application rules side panel, choose Warehouse Layout > Stations. The Stations window is displayed with the list of Station Types.
2. From the Station Type tree, select the relevant Station to be associated with a Device.
3. Choose . The Station Device Association pop-up window appears.
4. Enter information in the applicable fields. See [Table 3–22](#) for field value descriptions.
5. Choose .



**Table 3–22 Station Device Association Pop-up Window**

Field	Description
Station ID	This indicates the station id of the station being associated with a device.
<b>Device Association</b>	
Device Type	Choose the device type of the device to be associated with the station. For more information about a device type, see <a href="#">Section 13.1.1, "Defining a Device Type"</a> on page 941.
Device ID	Choose the device id of the device to be associated with the station.

**Note:** Choose  in the Station Device Association pop-up window to delete a device association (Device Type and Device ID).

## 3.12 Defining Transaction Repository

A repository is a logical collection of entities that define the business process workflow. The transaction repository includes the following entities:

- Transactions
- Conditions
- Actions
- Services

Yantra 7x provides a base repository for each of the system defined process types. Some of the entities within a repository are copied when creating a new document type. For more information about creating a new document type, see the *Yantra 7x Platform Configuration Guide*.


### 3.12.1 Transactions

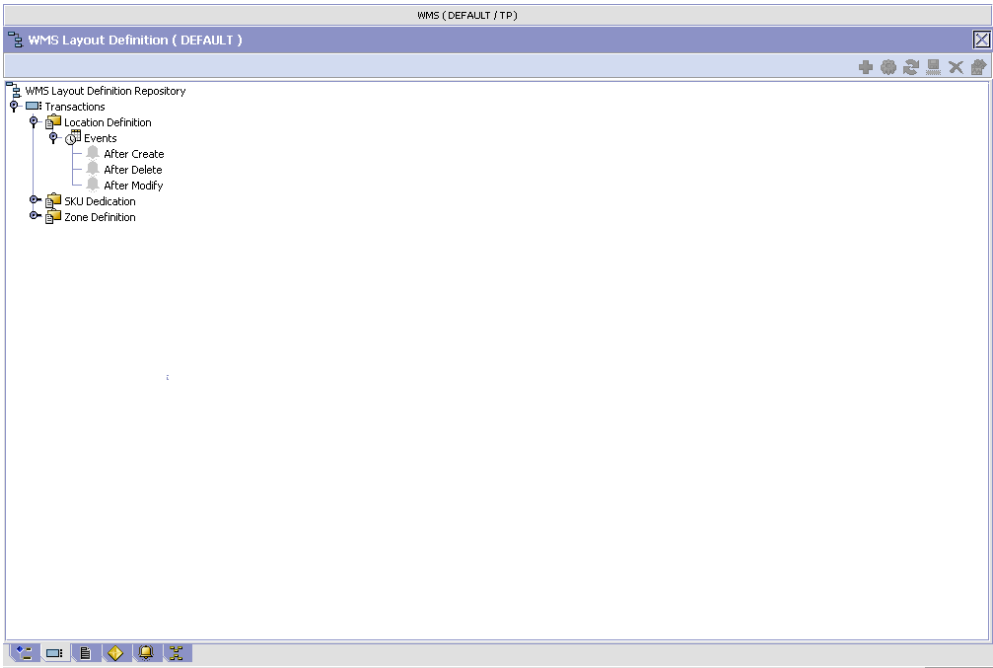
Every process type has a set of base transactions defined for it. A transaction is a logical unit of work that is necessary for performing activity within Yantra 7x. Base transactions are predefined transactions that contain information about how the transaction behaves, such as how many copies of a transaction can be kept in a process type and whether or not it can have configurable base pick and drop statuses. Base transactions can be used to create new transactions. These transactions can be changed within the limits defined in the base transaction.

For more information about transactions, see *Yantra 7x Platform Configuration Guide*.

To view the transaction repository details for warehouse layout:

1. From the tree in the application rules side panel, choose Warehouse Layout > Transaction Repository. The WMS Layout Definition window is displayed.

2. In the WMS Layout Definition window, choose .
3. The Transactions tab window is displayed.




**Table 3–23 WMS Layout Definition - Transactions Tab Window**

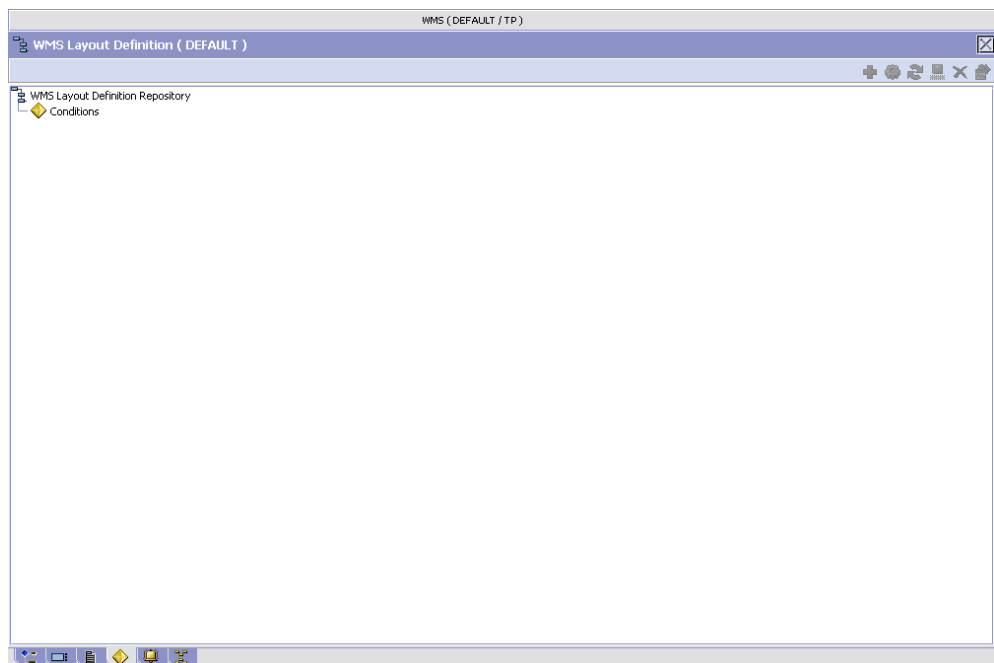
Field	Description
Location Definition	This transaction represents the changes to a location definition, with specificity to the creation, modification and deletion of a location.
SKU Dedication	This transaction represents the existence of inventory for a non-dedicated item.
Zone Definition	This transaction represents the changes to a zone definition, with specificity to the creation, modification and deletion of a location.

### 3.12.2 Conditions

A **condition** matches document type attributes against decision points and routes the documents to different paths based on the specified attribute and value combinations. The document type attributes against which conditions can be created are predefined in Yantra 7x. You can use these attributes in any combination or you can create conditions that execute the appropriate application logic for specific circumstances.

To view the condition repository details for warehouse layout:

1. From the tree in the application rules side panel, choose Warehouse Layout > Transaction Repository. The WMS Layout Definition window is displayed.
2. In the WMS Layout Definition window, choose .
3. The Conditions tab window is displayed.



Yantra 7x WMS default transaction repository does not have any conditions specified.


### 3.12.3 Actions

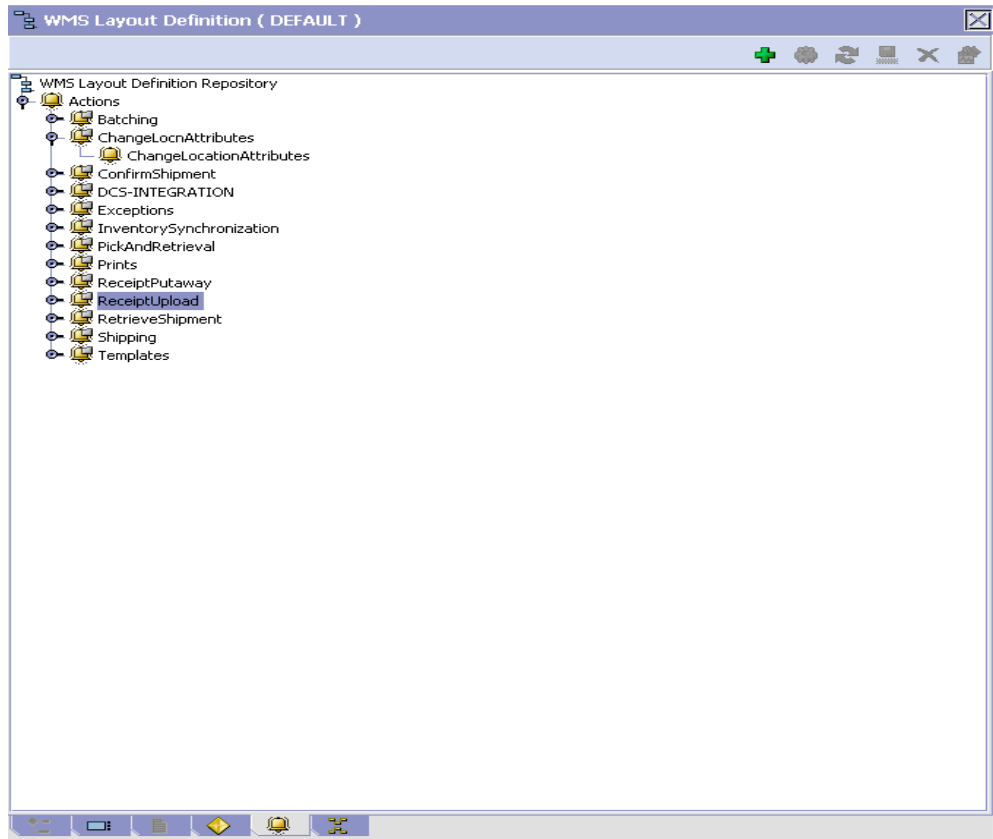
An **action** is a process or program that is triggered by an event. These processes and programs send user alert notifications and automatically resolve issues.

For example, when a variance task is created (the event), you can set an action to send the enterprise user an e-mail.

For more information about creating and modifying actions, see the *Yantra 7x Platform Configuration Guide*.

To view the action repository details for warehouse layout:

1. From the tree in the application rules side panel, choose Warehouse Layout > Transaction Repository. The WMS Layout Definition window is displayed.
2. In the WMS Layout Definition window, choose .
3. The Actions tab window is displayed.





**Table 3–24 WMS Layout Definition - Actions Tab Window**

Field	Description
Batching	Default settings are provided for: <b>Print Move Tickets</b> – Invokes the batch printing service for printing the move tickets. <b>Print Task Sheets</b> – Invokes the batch print service for printing the task sheets.
ChangeLocnAttributes	Default settings are provided for: <b>ChangeLocationAttributes</b> – Initiates the change location capacity updates if item dimensions or location dimensions change.
ConfirmShipment	Default settings are provided for: <b>ConfirmShipment</b> – Invokes the confirmShipment flow to confirm the shipment.
DCS-Integration	Default settings are provided for: <b>InventoryDownload</b> – Invokes the YantraWMSInventoryDownloadService service to download the inventory information from Yantra 7x to Yantra DCS. <b>PODownload</b> – Invokes the YantraWMSPODownloadService service to download the Purchase Order information from Yantra 7x to Yantra DCS.
Exceptions	Default settings are provided for: <b>ShortagesDetected</b> – Invokes the LogWavePlaFailure exception service when shortage of inventory occurs during wave release.
InventorySynchronization	Default settings are provided for: <b>CollectInventoryMismatch</b> – This service collects the inventory mismatch information between an external system and Yantra 7x. This is typically caused when some inventory updates at a node or a warehouse are not reported to Yantra 7x. <b>UploadInventoryChange</b> - This service reads the message from the JMS queue and invokes the adjustInventory API.

*Table 3–24 WMS Layout Definition - Actions Tab Window*

Field	Description
PickAndRetrieval	Default settings are provided for: <b>ConfirmEmptyLocationAfterPick</b> – Invokes the GenerateCountRequest flow which creates a count request.
Prints	Default settings are provided for: <b>PickList Print</b> – Invokes the print service for printing the Pick List. <b>LTL Manifest</b> – Invokes the print service for printing the Less-than Truck Load Manifest. <b>Print Load BOL</b> – Invokes the print service for printing the Load Bill of Lading. <b>Print PackList</b> – Invokes the print service for printing the Pack List. <b>Print Post Pick Container Labels</b> – Invokes the print service for printing UCC-128 container labels for containers, when system defined packing process is used. <b>Print Shipment BOL</b> – Invokes the print service for printing the Shipment Bill of Lading. <b>Print Shipping Label</b> – Invokes the print service for printing the UCC-128 container labels. <b>Print Wave</b> – Invokes the Print service for printing a Wave.
ReceiptPutaway	<b>Putaway products on receipt closure</b> – Indicates the default action provided to automatically initiate putaway of purchase order receipts.
ReceiptUpload	<b>UploadCaseReceipt</b> - Reads the message from JMS queue and invokes the receiveOrder API.
RetrieveShipment	<b>Retrieve Requested Serial</b> – This service invokes the retrieveShipment API to retrieve the requested serials to the specified location.

**Table 3–24 WMS Layout Definition - Actions Tab Window**


Field	Description
Shipping	<p>Default settings are provided for:</p> <p><b>Load Left Origin</b> – Invokes the doLoadLeftOriginUpdates service to mark that the load has left the origin.</p> <p><b>Stop Shipping</b> – Invokes the RaiseStopShippingAlert service to raise an alert to stop the processing of the shipment.</p>
Templates	<p>Default settings are provided for:</p> <p><b>Log Exception</b> – Logs the reasons due to which a count request could not be created for a Count Program.</p> <p><b>Publish Data</b> – Sends data to external queue or internal tables.</p> <p><b>Raise Exception</b> – Raises an alert using Yantra 7x Event Management from the published information.</p> <p><b>Route Shipment Exception</b> – Raises an exception if a Scac is not found for an outbound shipment.</p> <p><b>Send Email</b> – Raises an email action to create an email in the template format from the published information.</p> <p><b>Send Email-HTML format</b> – Raises an email action to create an email in HTML format from the published information.</p>

### 3.12.4 Service Definitions

Service definitions are a representation of the logic that regulates document workflow services. The Service Builder is a graphical interface that enables you to create a graphical representation of these *services*.

For more information about service definitions, see the *Yantra 7x Platform Configuration Guide*.

To view the service definition repository details for warehouse layout:

1. From the tree in the application rules side panel, choose Warehouse Layout > Transaction Repository. The WMS Layout Definition window is displayed.
2. In the WMS Layout Definition window, choose .

3. The Service Definitions tab window is displayed.

For more information about creating and modifying service definitions, see the *Yantra 7x Platform Configuration Guide*.

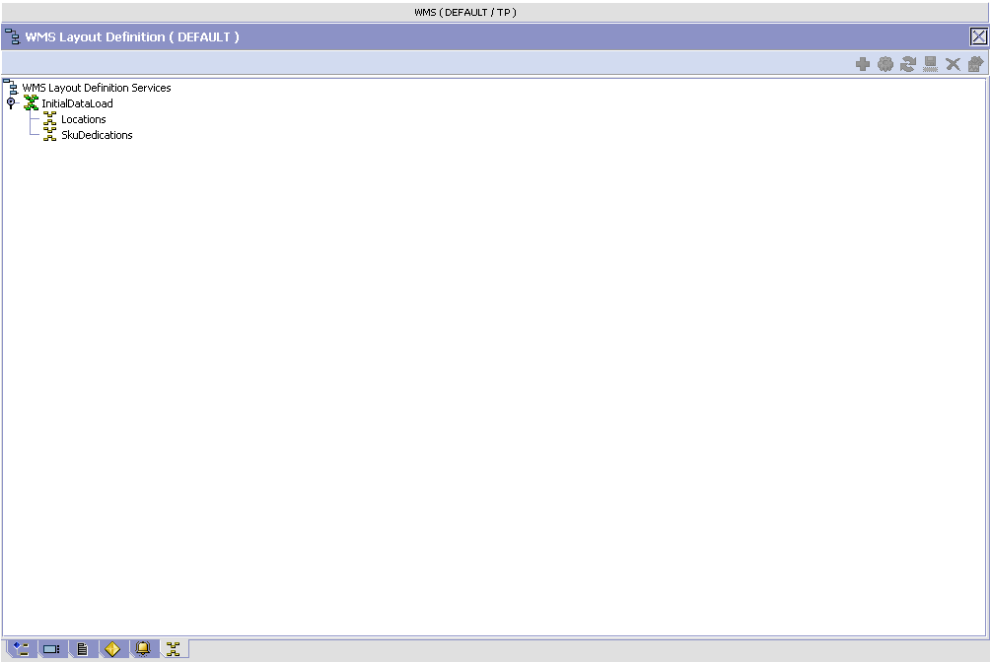


Table 3–25 Warehouse Layout - Service Definitions Tab Window

Field	Description
InitialDataLoad	
Location	This service loads location information from a flat file to the database. For more information about Initial Data Loading, see <i>Yantra 7x Integration Guide</i> .
SkuDedications	This service loads SKU dedication information from a flat file to the database. For more information about Initial Data Loading, see <i>Yantra 7x Integration Guide</i> .

## Configuring Inventory

---

Inventory defines the comprehensive functionality of Yantra 7x WMS to track, monitor, and maintain inventory in a warehouse. Inventory visibility is provided through consoles that provide the necessary granular information.

Use Inventory for:

- [Defining Product Class](#)
- [Defining Inventory Status](#)
- [Defining Inventory Adjustment Reasons](#)
- [Defining Inventory Transition Rules](#)
- [Defining Storage Preferences](#)
- [Defining Replenishment Strategy](#)
- [Defining Monitoring Rules](#)
- [Defining Transaction Repository](#)
- [Defining Purge Criteria](#)
- [Defining Node Item Attributes](#)
- [Defining Move Request Parameters](#)
- [Defining Count](#)

### 4.1 Defining Product Class

You can define the common codes used to indicate a product class. This is done in the Inventory Console. The product class refers to a product's classification, such as first quality, second quality, or finished good.

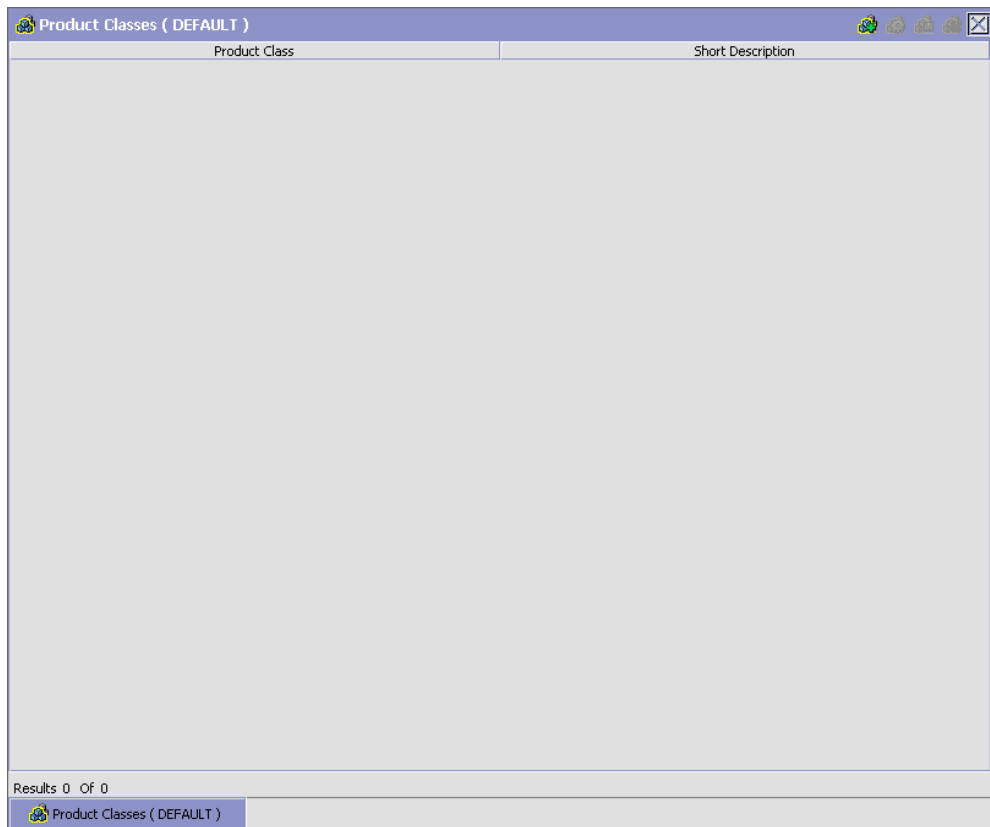
Use Product Class for:



- [Creating a Product Class](#)
- [Creating a New Product Class From an Existing Product Class](#)
- [Modifying a Product Class](#)
- [Deleting a Product Class](#)


### 4.1.1 Creating a Product Class

To create a product class:

1. From the tree in the application rules side panel, choose Inventory > Product Class. The Product Classes window is displayed.



2. In the Product Classes window, choose . The Product Class Details pop-up window appears.
3. Enter information in the applicable fields. Refer [Table 4–1](#) for field value descriptions.
4. Choose .





**Table 4–1 Product Class Details Pop-up Window**

Field	Description
Product Class	Enter the product class.
Short Description	Enter a brief description for the product class.
Long Description	Enter a more detailed description for the product class.

### 4.1.2 Creating a New Product Class From an Existing Product Class



To create a new product class from an existing product class:

1. From the tree in the application rules side panel, choose Inventory > Product Class. The Product Classes window is displayed with the list of product classes.
2. Choose the Product Class to be copied from. Choose . The Product Class Details pop-up window appears.
3. Enter information in the applicable fields. Refer [Table 4–1](#) for field value descriptions.
4. Choose .

### 4.1.3 Modifying a Product Class


Once a Product Class has been created, it may be modified.

To modify a product class:

1. From the tree in the application rules side panel, choose Inventory > Product Class. The Product Classes window is displayed with the list of product classes.
2. Choose the Product Class to be modified. Choose . The Product Class Details pop-up window appears.
3. Enter information in the applicable fields. Refer [Table 4–1](#) for field value descriptions.
4. Choose .

### 4.1.4 Deleting a Product Class

To delete a product class:

1. From the tree in the application rules side panel, choose Inventory > Product Class. The Product Classes window is displayed with the list of product classes.
2. Choose the Product Class to be deleted.
3. Choose .

## 4.2 Defining Inventory Status

*Inventory Status* is an additional classification of inventory in a node. An inventory status is directly connected to the availability of inventory through the association with a supply type. Inventory status is applied at the time of receiving, during packing or repair processes in a warehouse.

For example, during the packing process, a defective SKU may require a quality hold on the remaining units of the SKU, which are a part of the same shipment.


Use Inventory Status for:

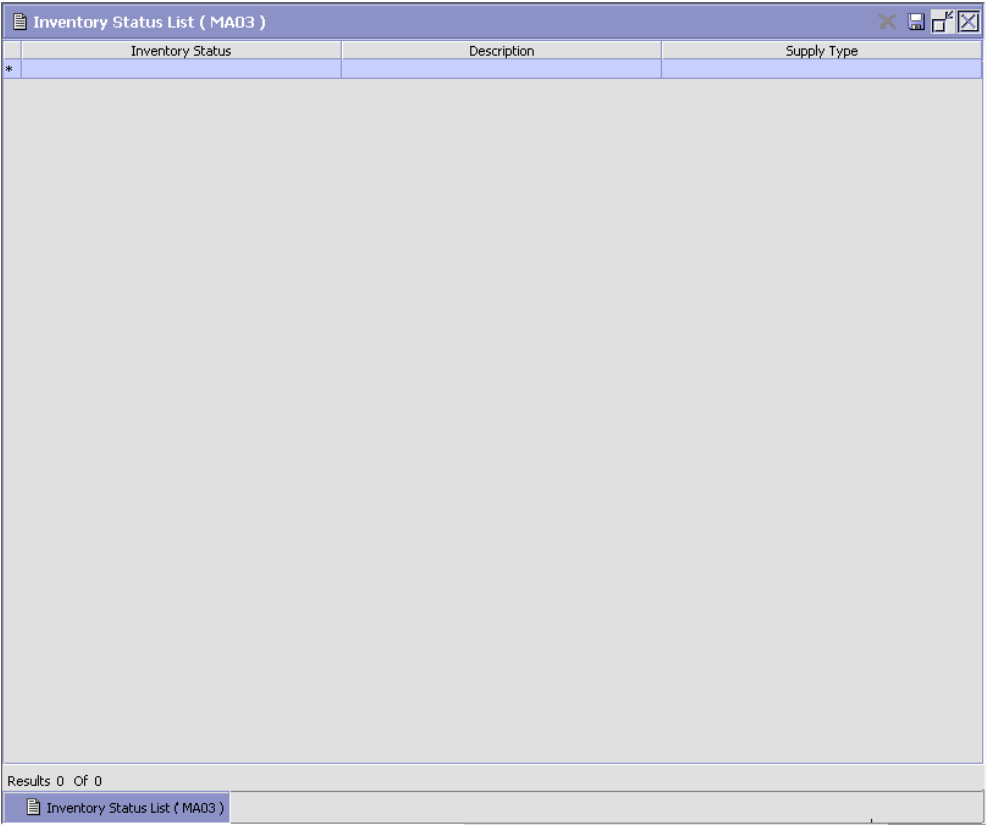
- [Creating an Inventory Status](#)
- [Modifying an Inventory Status](#)
- [Deleting an Inventory Status](#)



### 4.2.1 Creating an Inventory Status

To create an inventory status:

- 1. From the tree in the application rules side panel, choose Inventory > Inventory Status. The Inventory Status List window is displayed.
- 2. Enter information in the applicable fields. Refer [Table 4–2](#) for field value descriptions.
- 3. Choose .



**Table 4–2 Inventory Status List Window**


Field	Inventory
Inventory Status	Enter the name of the inventory status.
Description	Enter a brief description for the inventory status.
Supply Type	Choose the supply type associated with the inventory status. Supply type indicates classification of the inventory.

The inventory availability is visible at a product class and inventory status level for each SKU. The supply type attached with the inventory is used in Available To Promise (ATP) calculations.

### 4.2.2 Modifying an Inventory Status

Once an inventory status has been created, it can be modified.


To modify an inventory status:

1. From the tree in the application rules side panel, choose Inventory > Inventory Status. The Inventory Status List window is displayed with the list of Inventory Status.
2. Enter information in the applicable fields. Refer [Table 4–2](#) for field value descriptions.
3. Choose .

The supply type associated with an inventory status cannot be modified if there is any inventory for the inventory status.

### 4.2.3 Deleting an Inventory Status

To delete an inventory status:

1. From the tree in the application rules side panel, choose Inventory > Inventory Status. The Inventory Status List window is displayed with the list of Inventory Status.
2. Choose the Inventory Status to be deleted.
3. Choose .

An inventory status cannot be deleted if there is any inventory with that inventory status.

## 4.3 Defining Inventory Adjustment Reasons

An inventory adjustment in Yantra 7x WMS is associated with a reason. The Inventory Adjustment Reason allows tracking and reporting of all adjustments at a reason code level. Inventory adjustment reason codes provide granularity for reporting and tracking of warehouse performance.

Yantra 7x WMS uses pre-defined reason codes like 'RECEIPT', 'SHIP', 'PACK' for certain operations. These codes are mandatory for a warehouse.

The 'RECEIPT' reason code is used for recording receipt of inventory for an inbound shipment (including returns). The 'PACK' reason code is used whenever you add product to an outbound container, which may happen during picking or packing process. The inventory being packed is moved into a virtual location called as the Accounting Bin. This location association is mandatory for this reason code. During the shipping process, inventory is decremented from this bin location. The bin location associated with 'PACK' reason code should not have Track Pallet or Track Case functionalities enabled. The 'SHIP' reason code is used for recording shipping of inventory for an outbound shipment.

Use Inventory Adjustment Reasons for:

- [Creating an Inventory Adjustment Reason](#)
- [Creating a New Inventory Adjustment Reason from an Existing Inventory Adjustment Reason](#)
- [Modifying an Inventory Adjustment Reason](#)
- [Deleting an Inventory Adjustment Reason](#)

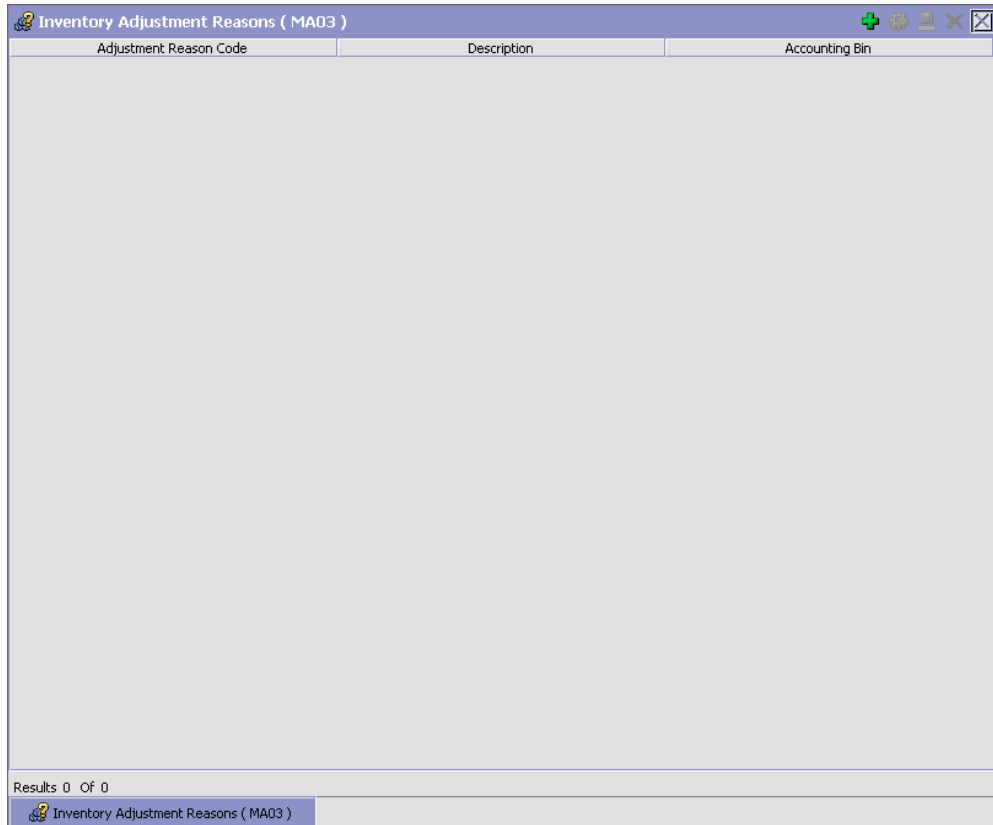
The code used is interfaced with external systems including financials and data warehousing systems.



### 4.3.1 Creating an Inventory Adjustment Reason

To create an inventory adjustment reason:

## Defining Inventory Adjustment Reasons

1. From the tree in the application rules side panel, choose Inventory > Inventory Adjustment Reasons. The Inventory Adjustment Reasons window is displayed.



2. Choose  to create a new inventory adjustment reason. The Inventory Adjustment Reason Details window is displayed.
3. Enter information in the applicable fields. Refer [Table 4–3](#) for field value descriptions.
4. Choose .

**Inventory Adjustment Reason Details ( MA03 )**

Adjustment Reason Code  Description

Accounting Bin

Enterprise Code	Host Adjustment Reason Code
*	

Results 0 Of 0



Adjustment Sequence	Location Id	Zone Id
---------------------	-------------	---------

Results 0 Of 0

**Table 4–3 Inventory Adjustment Reason Details Window**

Field	Description
Adjustment Reason Code	Enter the reason code for inventory adjustment. Typical values seen are 'Count Error,' 'Receipt Error,' 'Breakages,' and 'Scrap'.
Description	Enter a brief description for the adjustment reason code.

**Table 4–3 Inventory Adjustment Reason Details Window**

Field	Description
Accounting Bin	<p>Choose the accounting bin location for the inventory, if required. Locations in the node with location type as 'VIRTUAL' are displayed.</p> <p>The accounting bin represents a virtual location in the warehouse, which is used as a reconciliation mechanism for the inventory being adjusted. For example, in a 3PL warehouse, a client's representative is responsible for the inventory picture. This means that all adjustments or discrepancies found during count require an additional step for approval.</p> <p>The accounting bin also provides a location that tracks the discrepancies as they happen and also reconcile them when inventory is found elsewhere in the warehouse (usually a neighboring location).</p> <p>Choose  to create a new accounting bin location for the inventory.</p>
<b>Host Reason Codes</b>	
Enterprise Code	Choose the enterprise code.
Host Adjustment Reason Code	<p>Choose the host adjustment reason code.</p> <p>The host reason code is used to translate warehouse reason codes to a Host Reason Code.</p> <p>For example, a warehouse that has reason codes by department level requiring to translate these codes to a common Host reason code. The host reason code is part of the data published to the host system.</p> <p>Choose  to create a new Host Adjustment Reason Code, by entering Inventory Reason and its short and long descriptions.</p>
<b>Adjustment Sequence</b>	
Adjustment Sequence	<p>Displays the sequence or priority number of the locations or zones for adjustment.</p> <p>Locations or zones are adjusted consecutively, based on their Adjustment Sequence number. Locations or zones with a lower Adjustment Sequence number are adjusted prior to locations or zones with a higher Adjustment Sequence number.</p>

**Table 4–3** *Inventory Adjustment Reason Details Window*

Field	Description
Location ID	Displays the location from which the inventory is deducted.
Zone ID	Displays the zone from which the inventory is deducted.

**Note:** When creating a new Inventory Adjustment Reason, the Adjustment Sequence panel is available only after you save the details entered.

#### 4.3.1.1 Defining Adjustment Sequence

An inventory adjustment reason in Yantra 7x WMS can be associated with an adjustment sequence. Configuring an adjustment sequence for an inventory adjustment reason lets you adjust inventory from a specified sequence of locations when the pick location cannot be verified. For example, it can be used for cash and carry transactions at the point of sale in stores. An inventory adjustment reason code need not necessarily have an adjustment sequence associated with it.


The `adjustLocationInventory` API is used to adjust location inventory. This API can be called with either a Location ID and an inventory reason code associated with an adjustment sequence or with only an inventory reason code associated with an adjustment sequence, without a Location ID. The transaction does not go through when the Location ID is not passed and the inventory reason code passed does not have an adjustment sequence associated with it. For more information about the `adjustLocationInventory` API, see the *Yantra 7x Integration Guide*.

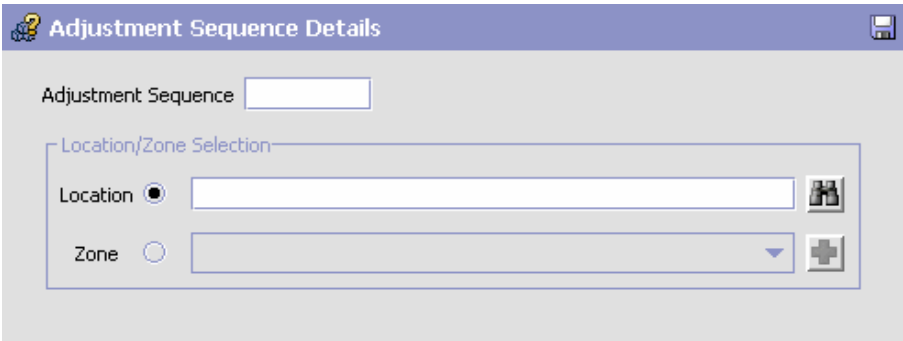
Use Adjustment Sequence for:


- [Creating an Adjustment Sequence](#)
- [Modifying an Adjustment Sequence](#)
- [Deleting an Adjustment Sequence](#)

##### 4.3.1.1.1 Creating an Adjustment Sequence

To create an adjustment sequence:

- 1. In the Adjustment Sequence panel of the Inventory Adjustment Reason Details window, choose . The Adjustment Sequence Details window is displayed.







- 2. Enter information in the applicable fields. Refer [Table 4–4](#) for field value descriptions.
- 3. Choose .

**Table 4–4** *Adjustment Sequence Details Window*

Field	Description
Adjustment Sequence	<p>Enter the sequence or priority number of the location or zone for adjustment.</p> <p>Locations or zones are adjusted consecutively, based on their Adjustment Sequence number. Locations or zones with a lower Adjustment Sequence number are adjusted prior to locations or zones with a higher Adjustment Sequence number.</p> <p>You can configure a virtual location to be one of the locations in the sequence. In this case, if the item is unavailable in the prior locations, it is adjusted against the virtual location.</p>





**Table 4–4 Adjustment Sequence Details Window**

Field	Description
Location ID	<p>Enter the location from which the inventory is deducted.</p> <p>Choose  to create a new location for adjustment.</p> <p>Choose  to search a configured location for adjustment.</p>
Zone ID	<p>Enter the zone from which the inventory is deducted.</p> <p>Choose  to create a new zone for adjustment.</p> <p>Choose  to search a configured zone for adjustment.</p>

**Note:** It is recommended that the regular locations and the virtual location of the adjustment sequence are configured in separate zones.


#### 4.3.1.1.2 Modifying an Adjustment Sequence

To modify an adjustment sequence:

1. In the Adjustment Sequence panel of the Inventory Adjustment Reason Details window, choose the Adjustment Sequence to modify.
2. Choose . The Adjustment Sequence Details window is displayed.
3. Enter information in the applicable fields. Refer [Table 4–4](#) for field value descriptions.
4. Choose .



#### 4.3.1.1.3 Deleting an Adjustment Sequence

To delete an adjustment sequence:

1. In the Adjustment Sequence panel of the Inventory Adjustment Reason Details window, choose the Adjustment Sequence to delete.
2. Choose .

### 4.3.2 Creating a New Inventory Adjustment Reason from an Existing Inventory Adjustment Reason



To create a new inventory adjustment reason from an existing inventory adjustment reason:

1. From the tree in the application rules side panel, choose Inventory > Inventory Adjustment Reasons. The Inventory Adjustment Reasons window is displayed with the list of Inventory Adjustment Reasons.
2. Choose the Inventory Adjustment Reason to be copied from.
3. Choose . The Inventory Adjustment Reason Details window is displayed.
4. Enter information in the applicable fields. Refer [Table 4–3](#) for field value descriptions.
5. Choose .

### 4.3.3 Modifying an Inventory Adjustment Reason


Once an inventory adjustment reason has been created, it can be modified.

To modify an inventory adjustment reason:

1. From the tree in the application rules side panel, choose Inventory > Inventory Adjustment Reasons. The Inventory Adjustment Reasons window is displayed with the list of Inventory Adjustment Reasons.
2. Choose the Inventory Adjustment Reason to modify.
3. Choose . The Inventory Adjustment Reason Details window is displayed.
4. Enter information in the applicable fields. Refer [Table 4–3](#) for field value descriptions.
5. Choose .

### 4.3.4 Deleting an Inventory Adjustment Reason

To delete an inventory adjustment reason:

1. From the tree in the application rules side panel, choose Inventory > Inventory Adjustment Reasons. The Inventory Adjustment Reasons window is displayed with the list of Inventory Status.
2. Choose the Inventory Adjustment Reason to be deleted.
3. Choose .

## 4.4 Defining Inventory Transition Rules

Inventory Status Transition Rules are designed primarily to control the inventory visibility to the Order Management system. They can be used during inbound putaway and during replenishment from overflow zones to bulk / active zones to control what inventory is visible to the order management system for scheduling.

While moving product between zones that are used for outbound picking, it is not possible to limit the visibility of one versus the other, because inventory within all zones used for outbound picking must be available for scheduling. Hence, the inventory status transition rules should not be setup between bulk zone to active zone in situations where bulk picks are possible directly from bulk zones. However, they can be used in movement of product from overflow zones to bulk / active zones where product is not directly picked for the outbound process from the overflow zones.

Inventory Status Transition Rules can be specified at a zone level to convert the Inventory status associated with inventory being moved into the zone appropriately.

---

**NOTE:** To be able to confirm a Work Order you should have an Inventory Status Transition Rule setup for the Zone that the VAS location belongs. This Inventory Status Transition Rule should be defined from Blank to an Inventory Status that is associated with an ONHAND Supply Type.

---

For example, inventory being moved into the QC zone is converted to 'Quality Held' from all other inventory statuses.


For more information about setting up Inventory Transition Rules, while setting up a zone, see [Section 3.5.1, "Creating a Zone"](#) on page 47.

Use Inventory Transition Rules for:

- [Creating an Inventory Transition Rule](#)
- [Modifying an Inventory Transition Rule](#)
- [Deleting an Inventory Transition Rule](#)

### 4.4.1 Creating an Inventory Transition Rule

To create an inventory transition rule:

1. From the tree in the application rules side panel, choose Inventory > Inventory Transition Rules. The Inventory Transition Rules window is displayed.
2. Enter information in the applicable fields. Refer [Table 4–5](#) for field value descriptions.
3. Choose .

Inventory Transition Rules ( MA03 )

	Zone	Inventory Status	Supply Type	New Inventory Status	New Supply Type
*					

Results 0 Of 0

Inventory Transition Rules ( MA03 )

**Table 4–5 Inventory Transition Rules Window**

Field	Description
Zone	<p>Choose the zone for which the inventory transition rule is being set up.</p> <p>For more information about Creating a Zone, see <a href="#">Section 3.5.1, "Creating a Zone"</a> on page 47</p>
Inventory Status	<p>Choose the inventory status of the product being moved into the zone.</p> <p>This defines the inventory status that needs to be modified when moved into this zone.</p> <p>For more information, see <a href="#">Section 4.2.1, "Creating an Inventory Status"</a> on page 123.</p>
Supply Type	<p>This indicates the supply type associated with the inventory status.</p> <p>Supply type indicates classification of the inventory. This value is populated automatically by Yantra 7x WMS from the inventory status configuration.</p> <p>For more information about Inventory Supply Types, see <i>Yantra 7x Inventory Synchronization Configuration Guide</i>.</p>


**Table 4–5 Inventory Transition Rules Window**

Field	Description
New Inventory Status	<p>Choose the inventory status applicable to the zone.</p> <p>This defines the new inventory status that replaces the current inventory status. This is used for the automatic conversion of the inventory status.</p> <p>For example, a warehouse with QC zone having 'Quality Held' inventory status and bulk storage zones having 'Normal' inventory status. All product putaway into QC zone has status converted to 'Quality Held' automatically. Inventory putaway into bulk storage has status converted to 'Normal' automatically.</p>
New Supply Type	<p>This indicates the supply type associated with the inventory status.</p> <p>The supply type indicates classification of the inventory. This value is populated automatically by Yantra 7x WMS from the inventory status configuration.</p> <p>For more information about Inventory Supply Types, see <i>Yantra 7x Inventory Synchronization Configuration Guide</i>.</p>

### 4.4.2 Modifying an Inventory Transition Rule

Once an Inventory Transition Rule has been created, it can be modified.


To modify an inventory transition rule:

1. From the tree in the application rules side panel, choose Inventory > Inventory Transition Rules. The Inventory Transition Rules window is displayed with the list of Inventory Transition Rules.
2. Enter information in the applicable fields. Refer [Table 4–5](#) for field value descriptions.
3. Choose .

### 4.4.3 Deleting an Inventory Transition Rule

To delete an inventory transition rule:

1. From the tree in the application rules side panel, choose Inventory > Inventory Transition Rules. The Inventory Transition Rules window is displayed with the list of Inventory Transition Rules.

2. Choose the Inventory Transition Rule to be deleted.
3. Choose .

## 4.5 Defining Storage Preferences

*Storage Preference is used to define activity constraints for the putaway of inventory that is not specifically requested by any department.*

For example, during receiving, profiles for a vendor or item creates putaway request to the appropriate department. The remaining quantity that is not requested by a specific department is evaluated through the storage preferences.

**Note:** It is recommended that Zones containing Locations of type VIRTUAL should not be selected, while configuring the Putaway Preferences and Retrieval Strategy.

Use Storage Preferences for:

- [Setting Up Storage Preferences for Single SKU](#)
- [Setting Up Storage Preferences for Multi-SKU/Multi-Level Container](#)
- [Setting Up Storage Preferences for Container with Unknown Contents](#)

### 4.5.1 Setting Up Storage Preferences for Single SKU

The storage preferences of a single SKU are specified here.

Use Storage Preferences set-up for:

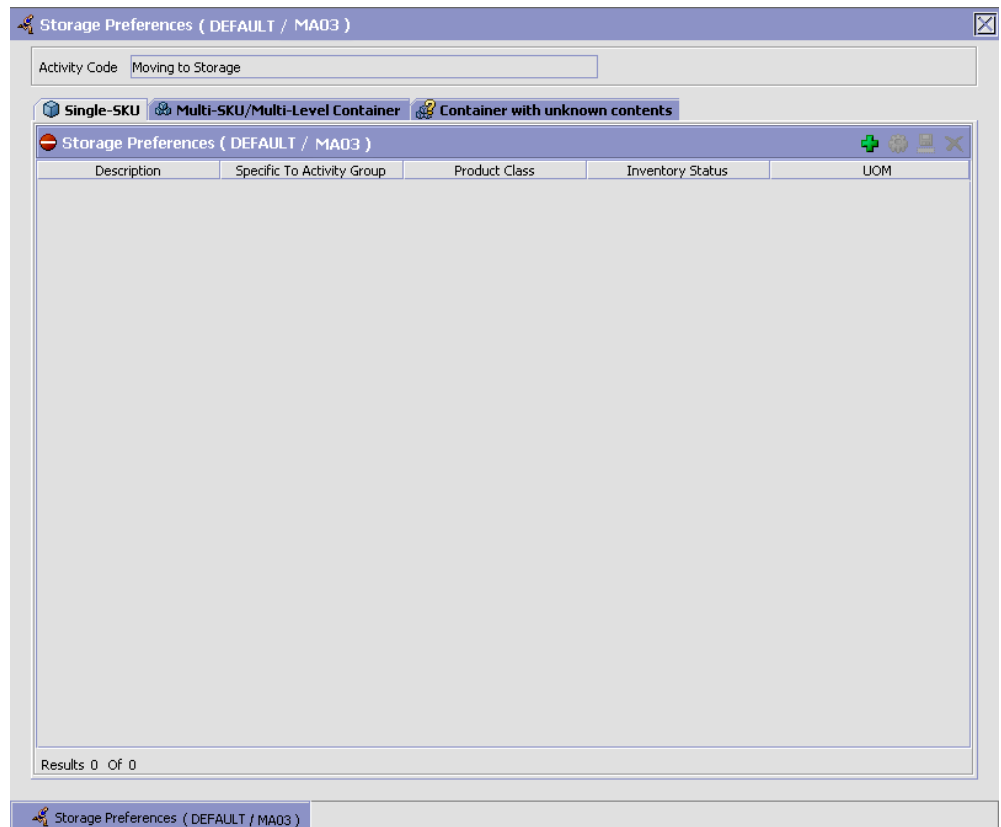
- [Creating a Storage Preference for Single SKU](#)
- [Creating a New Storage Preference for Single SKU from an Existing Storage Preference](#)
- [Modifying a Storage Preference for Single SKU](#)
- [Deleting a Storage Preference for Single SKU](#)



#### 4.5.1.1 Creating a Storage Preference for Single SKU

To create a storage preference for single SKU:



1. From the tree in the application rules side panel, choose Inventory > Storage Preferences. The Storage Preferences window is displayed.
2. In the Storage Preferences window, choose the Single-SKU tab. The Single-SKU tab window for Storage Preferences is displayed.



3. In the Single-SKU tab window, choose . The Storage Preference Details: Single SKU window is displayed.
4. Enter information in the applicable fields. Refer [Table 4–6](#) for field value descriptions.
5. Choose .

Storage Preference Details ( DEFAULT / MA03 ) : Single-SKU

Description

To View Strategy Click here

Activity Code

Moving to Storage

Requesting Activity Group

Product Class

Inventory Status

Segment Type

Segment

UOM

Container Type

Item Classification

Product Line

StorageType

Velocity Code

Zone Priorities


	Priority	Zone	Storage Code
*			

Results 0 Of 0


Storage Preferences ( DEFAULT / MA03 )

Storage Preference Details ( DEFAULT / MA03 ) : Single-SKU

Table 4–6 Storage Preference Details - Single-SKU Window

Field	Description
Description	Enter a description for the activity constraint.
To View Strategy Click here	Choose  to view or set up Putaway Strategy. For more details on setting up a putaway strategy see <a href="#">Setting Up Putaway Strategy for Single-SKUs</a> . Note: Putaway strategy may be specified for the putaway preferences after the preference is saved.
Activity Code	This indicates the activity code for the constraint.

**Table 4–6 Storage Preference Details - Single-SKU Window**

Field	Description
Requesting Activity Group	Choose the requesting activity group.
Product Class	Choose the product class for the preference, if applicable.  Product class is the inventory classification of an item based on product's characteristics. Typical values are FQ - First Quality, SQ - Second Quality, etc.
Inventory Status	Choose the inventory status for the preference, if applicable.  Inventory status refers to an inventory sub classification based on the results of the inventory control processes within the warehouse.
Segment Type	Enter the segment type for the preference, if applicable.  This indicates an inventory category. Typical values are MTC – Made to Customer, and MTO - Made to Order.
Segment	Enter the segment number for the preference, if applicable.  A segment holds either the specific buyer or specific order number that requires dedication.
UOM	Choose the UOM for the preference, if applicable.  UOM points to the Unit of measure of the item.
Container Type	The container type associated with the UOM selected is displayed. Typical values are "Pallet" and "Case".
Item Classification	<b>List of putaway item classifications for the Enterprise are displayed. An example, Product Line is shown below.</b>
Product Line	Choose relevant product line item classification for the putaway activity.  Choose  . In the Classification Values window, select the applicable product line classification.
Zone Priorities	


**Table 4–6 Storage Preference Details - Single-SKU Window**

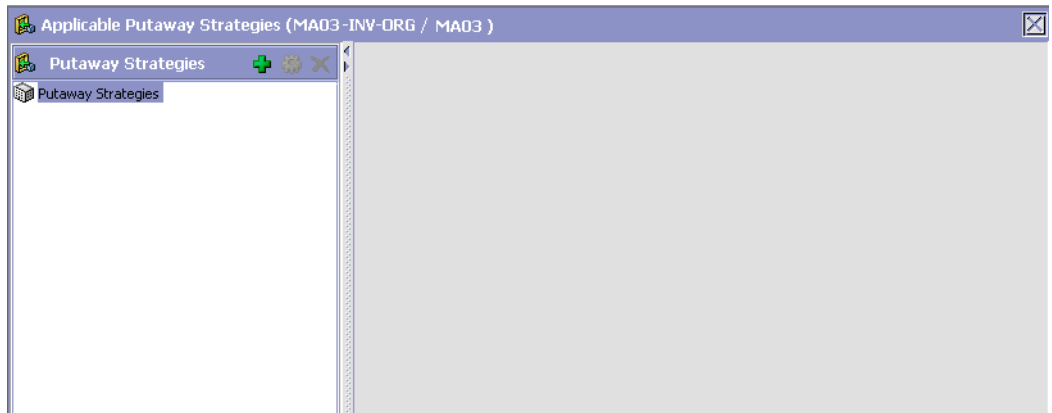
Field	Description
Priority	<p>Enter a number to represent the priority.</p> <p>The priority is used to sequence the order in which the zone priorities are evaluated. For example, all storage code level priorities are to be evaluated first before generic priorities.</p> <p>The priority needs to be a positive integer, greater than zero. This is mandatory.</p>
Zone	<p>Choose the relevant zone to be used as the target zone for putaway.</p> <p>This is a mandatory field.</p>
Storage Code	<p>Choose the storage code for the zone, if applicable.</p> <p>This limits the locations being evaluated to the storage code specified. For example, putaway of hazardous items into a zone are restricted to the locations having the appropriate storage code.</p>



### Setting Up Putaway Strategy for Single-SKUs

You can set up putaway strategies to putaway applicable inventory from a source zone to a target zone, based on the strategy specified.

To set up putaway strategy for single-SKUs:

1. In the Storage Preference Details: Single SKU window, choose .
2. The Applicable Putaway Strategies window is displayed.



3. Choose  in the Putaway Strategies panel. The Putaway Strategy Details window appears in the right panel.
4. Enter information in the applicable fields. See the Putaway Strategy Details Window table for field value descriptions.
5. Choose .

Putaway Strategy Details

DescriptionStrategy for DVD-LockAndKey-EACHUOMCASE

Item Classification

Product LineDVD

StorageTypeLockAndKey

Product Line

System Directed Putaway Task Types

	Source Zone	Target Zone	Container Type	Task Type
*				

Results 0 Of 0

Ad Hoc Task Types




	Source Zone	Target Zone	Container Type	Task Type
*				

Results 0 Of 0

Table 4–7 Putaway Strategy Details Window



Field	Description
Description	Enter a description for the Putaway Strategy.
UOM	Select the UOM for the Putaway Strategy, if applicable. Note: The UOM will be defaulted in instances where it has been specified in the Putaway Preference Details screen.

**Table 4–7 Putaway Strategy Details Window**

Field	Description
<b>Item Classification</b>	List of putaway item classifications for the Enterprise are displayed. An example, Product Line is shown below.
Product Line	Choose relevant product line item classification for the putaway activity.  Choose  . In the Classification Values window, select the applicable product line classification.
<b>System Directed Putaway Task Types</b>	<b>Displays the list of existing system directed putaway task types.</b>  <b>You may use  to delete an existing system directed putaway task type.</b>
Source Zone	Select the source zone where inventory is available.
Target Zone	Select the target zone where you want to move the inventory.
Container Type	Select the container type to be used to move the inventory from the source zone to the target zone. Typical values are Case and Pallet.
Task Type	Select the Putaway Task Type applicable to this putaway strategy. This field displays the list of existing system directed task types that belong to the 'PUTAWAY' activity group.
<b>Ad hoc Task Types</b>	<b>Displays the list of existing ad hoc task types.</b>  <b>You may use  to delete an existing ad hoc task type.</b>
Source Zone	Select the source zone where inventory is available.
Target Zone	Select the target zone where you want to move the inventory.
Container Type	Select the container type to be used to move the inventory from the source zone to the target zone. Typical values are Case and Pallet.
Task Type	Select the Putaway Task Type applicable to this putaway strategy. This field displays the list of existing ad hoc task types that belong to the 'PUTAWAY' activity group.



### 4.5.1.2 Creating a New Storage Preference for Single SKU from an Existing Storage Preference

To create a new storage preference for single SKU from an existing storage preference:

1. From the tree in the application rules side panel, choose Inventory > Storage Preferences. The Storage Preferences window is displayed.
2. In the Storage Preferences window, choose the Single-SKU tab. The Single-SKU tab window for Storage Preferences is displayed.
3. In the Single-SKU tab window, choose the Storage Preference that is to be copied from.
4. Choose . The Storage Preference Details window is displayed.
5. Enter information in the applicable fields. Refer [Table 4–6](#) for field value descriptions.
6. Choose .

### 4.5.1.3 Modifying a Storage Preference for Single SKU

To modify a storage preference for single SKU:


1. From the tree in the application rules side panel, choose Inventory > Storage Preferences. The Storage Preferences window is displayed.
2. In the Storage Preferences window, choose the Single-SKU tab. The Single-SKU tab window for Storage Preferences is displayed.
3. In the Single-SKU tab window, choose the Storage Preference that is to be modified.
4. Choose . The Storage Preference Details window is displayed.
5. Enter information in the applicable fields. Refer [Table 4–6](#) for field value descriptions.
6. Choose .

### 4.5.1.4 Deleting a Storage Preference for Single SKU

To delete a Storage Preferences for single SKU:

1. From the tree in the application rules side panel, choose Inventory > Storage Preferences. The Storage Preferences window is displayed.



2. In the Storage Preferences window, choose the Single-SKU tab. The Single-SKU tab window for Storage Preferences is displayed.
3. In the Single-SKU tab window, choose the Storage Preference that is to be deleted.
4. Choose .

## 4.5.2 Setting Up Storage Preferences for Multi-SKU/Multi-Level Container

The storage preference details of a multi-level case or pallet are specified here. This also applies to multi-level CASE with LPN and multi-level PALLET with LPN.

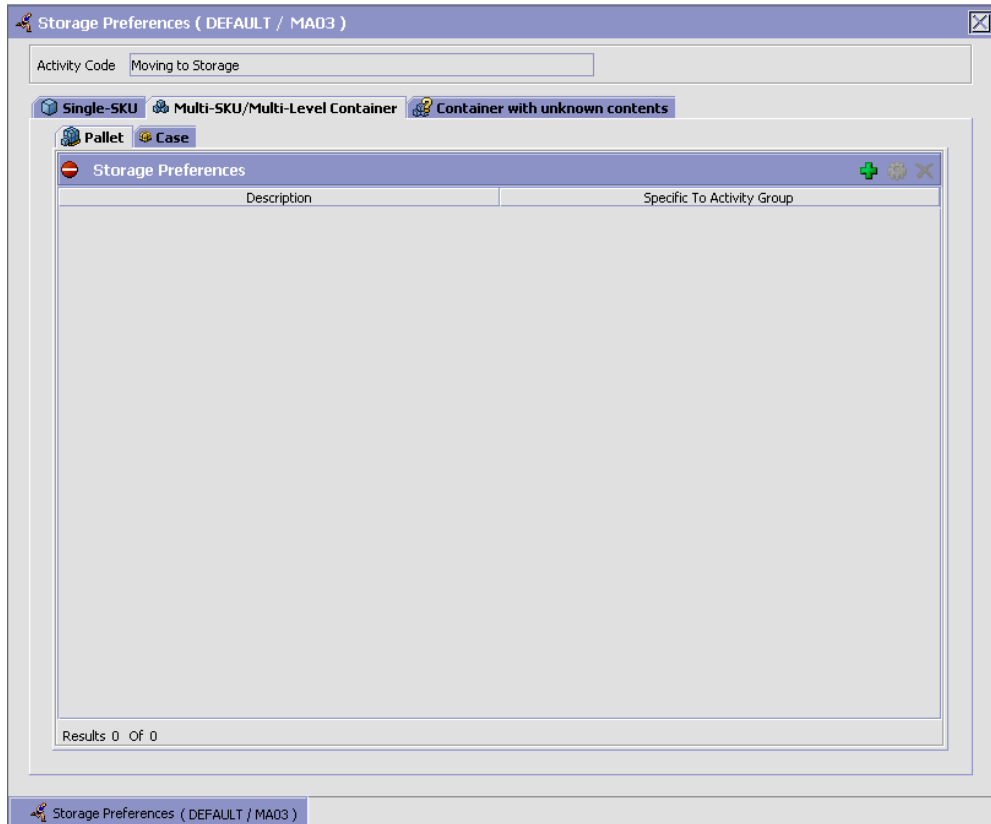
Use the Storage Preferences for Multi-SKU/Multi-Level Container set-up for:

- [Creating a Storage Preference for Multi-SKU/Multi-Level Container](#)
- [Modifying a Storage Preference for Multi-SKU/Multi-Level Container](#)
- [Deleting a Storage Preference for Multi-SKU/Multi-Level Container](#)

### 4.5.2.1 Creating a Storage Preference for Multi-SKU/Multi-Level Container

To create a storage preference for multi-SKU/multi-level container:

1. From the tree in the application rules side panel, choose Inventory > Storage Preferences. The Storage Preferences window is displayed.
2. In the Storage Preferences window, choose the Multi-SKU/Multi-Level Container tab. The Multi-SKU/Multi-Level Container tab window for Storage Preferences is displayed.





Storage Preferences for multi-level cases or pallets are specified separately:

- [Setting Up Storage Preferences for Multi-Level Pallets](#)
- [Setting Up Storage Preferences for Multi-Level Cases](#)

#### 4.5.2.1.1 Setting Up Storage Preferences for Multi-Level Pallets

To set up Storage Preferences for multi-level pallets:

1. In the Multi-SKU/Multi-Level Container tab of Storage Preferences window, choose the Pallet tab. The Pallet tab window is displayed.
2. In the Pallet tab window, choose .

- 3. The Storage Preference Details window appears.
- 4. Enter information in the applicable fields. Refer [Table 4–8](#) for field value descriptions.
- 5. Choose .

Storage Preference Details ( DEFAULT / MA03 ) : Multi-SKU/Multi-Level Container : Pallet

Description

To View Strategy Click here

Activity Code

Moving to Storage

Requesting Activity Group

☐

Putaway each SKU separately for Multi-SKU Pallets

Zone Priorities


	Priority	Zone	Storage Code
*			

Results 0 Of 0

Storage Preferences ( DEFAULT / MA03 )

Storage Preference Details ( DEFAULT / MA03 ) : Multi-Level Container : Pallet


**Table 4–8 Storage Preference Details : Multi-SKU/Multi-Level Container - Pallet Tab**

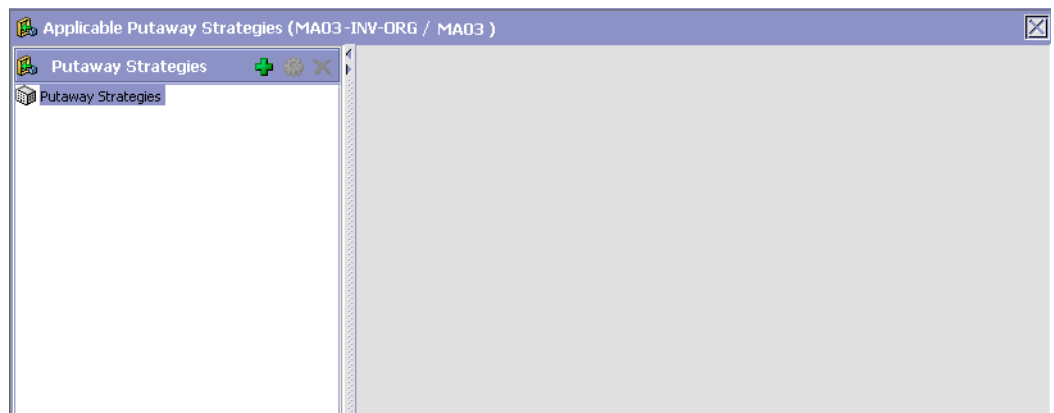
Field	Description
Description	Enter a description for the storage preference.
To View Strategy Click here	<p>Choose  to view or set up Putaway Strategy. For more details on setting up a putaway strategy see <a href="#">Setting Up Putaway Strategy for Multi-SKU/Multi-Level Containers - Pallets</a>.</p> <p>Note: Putaway strategy may be specified for the putaway preferences after the preference is saved.</p>
Activity Code	This indicates the activity code for the storage preference.
Requesting Activity Group	Choose the requesting activity group.
Put away each SKU separately for Multi-SKU Pallets	<p>Select if each SKU on the multi-SKU pallet is evaluated individually.</p> <p>If selected, the putaway preferences for a single SKU are evaluated for the multi-SKU pallet. The Zone Priorities Panel is removed on this selection.</p>
<b>Zone Priorities</b>	
Priority	<p>Enter a number to represent the priority.</p> <p>The priority is used to sequence the order in which the zone priorities are evaluated. For example, all storage code level priorities are to be evaluated first before generic priorities.</p> <p>The priority needs to be a positive integer, greater than zero. This is mandatory.</p>
Zone	<p>Choose the relevant zone to be used as the target zone for putaway.</p> <p>This is a mandatory field.</p>
Storage Code	<p>Choose the storage code for the zone, if applicable.</p> <p>This limits the locations being evaluated to the storage code specified. For example, putaway of hazardous items into a zone are restricted to the locations having the appropriate storage code.</p>



## Setting Up Putaway Strategy for Multi-SKU/Multi-Level Containers - Pallets

You can set up putaway strategies to putaway applicable inventory from a source zone to a target zone, based on the strategy specified.

To set up putaway strategy for multi-SKU/multi-level container pallets:

1. In the Storage Preference Details: Multi-SKU/Multi-Level Container: Pallet window, choose .
2. The Applicable Putaway Strategies window is displayed.



3. Choose  in the Putaway Strategies panel. The Putaway Strategy Details window appears in the right panel.
4. Enter information in the applicable fields. See the Putaway Strategy Details Window table for field value descriptions.
5. Choose .

Putaway Strategy Details

DescriptionStrategy for DVD-LockAndKey-EACHUOMCASE

Item Classification

Product LineDVD

StorageTypeLockAndKey

Product Line

System Directed Putaway Task Types

	Source Zone	Target Zone	Container Type	Task Type
*				

Results 0 Of 0

Ad Hoc Task Types




	Source Zone	Target Zone	Container Type	Task Type
*				

Results 0 Of 0

Table 4–9 Putaway Strategy Details Window

Field	Description
Description	Enter a description for the Putaway Strategy.
UOM	Select the UOM for the Putaway Strategy, if applicable. Note: The UOM will be defaulted in instances where it has been specified in the Putaway Preference Details screen.

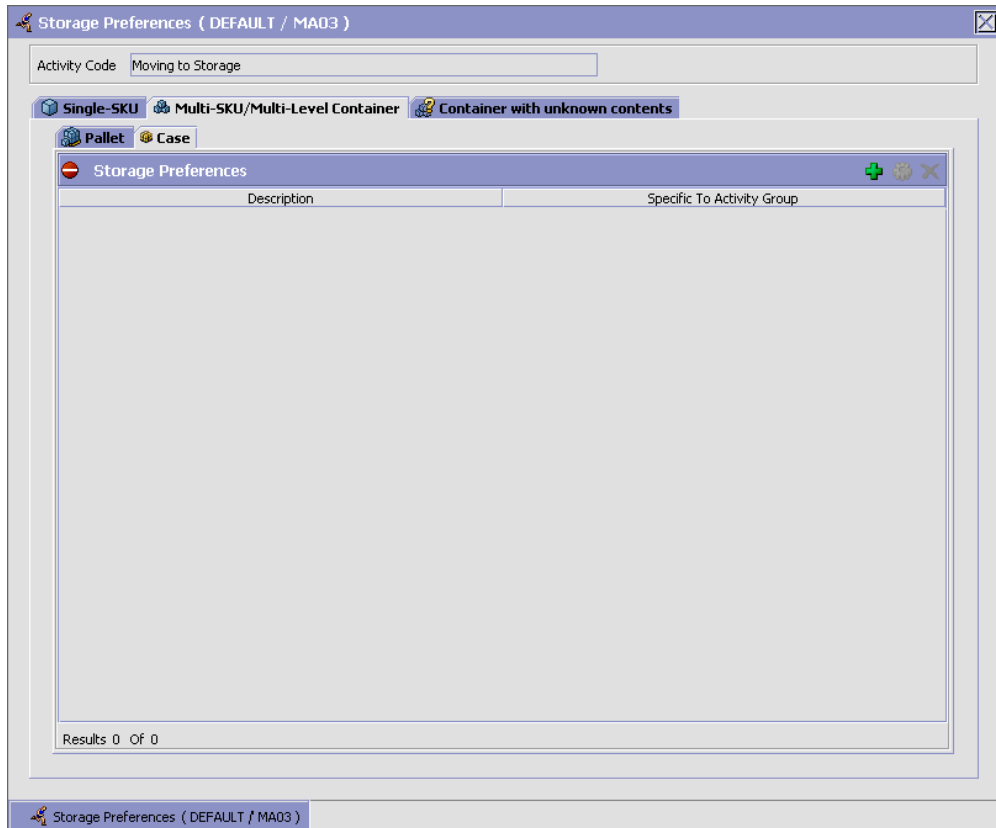
**Table 4–9 Putaway Strategy Details Window**



Field	Description
<b>Item Classification</b>	List of putaway item classifications for the Enterprise are displayed. An example, Product Line is shown below.
Product Line	<p>Choose relevant product line item classification for the putaway activity.</p> <p>Choose . In the Classification Values window, select the applicable product line classification.</p>
<b>System Directed Putaway Task Types</b>	<p><b>Displays the list of existing system directed putaway task types.</b></p> <p><b>You may use  to delete an existing system directed putaway task type.</b></p>
Source Zone	Select the source zone where inventory is available.
Target Zone	Select the target zone where you want to move the inventory.
Container Type	Select the container type to be used to move the inventory from the source zone to the target zone. Typical values are Case and Pallet.
Task Type	Select the Putaway Task Type applicable to this putaway strategy. This field displays the list of existing system directed task types that belong to the 'PUTAWAY' activity group.
<b>Ad hoc Task Types</b>	<p><b>Displays the list of existing ad hoc task types.</b></p> <p><b>You may use  to delete an existing ad hoc task type.</b></p>
Source Zone	Select the source zone where inventory is available.
Target Zone	Select the target zone where you want to move the inventory.
Container Type	Select the container type to be used to move the inventory from the source zone to the target zone. Typical values are Case and Pallet.
Task Type	Select the Putaway Task Type applicable to this putaway strategy. This field displays the list of existing ad hoc task types that belong to the 'PUTAWAY' activity group.

### 4.5.2.1.2 Setting Up Storage Preferences for Multi-Level Cases

To set up Storage Preferences for multi-level cases:

1. In the Multi-SKU/Multi-Level Container tab of Storage Preferences window, choose the Case tab. The Case tab window is displayed.



2. In the Case tab window, choose .
3. The Storage Preference Details window appears.
4. Enter information in the applicable fields. Refer [Table 4–10](#) for field value descriptions.
5. Choose .



Storage Preference Details ( DEFAULT / MA03 ) : Multi-SKU/Multi-Level Container : Case

Description

To View Strategy Click here

Activity Code

Moving to Storage


Requesting Activity Group

Zone Priorities

	Priority	Zone	Storage Code
*			

Results 0 Of 0

Table 4–10 Storage Preference Details : Multi-SKU/Multi-Level Container - Case Tab

Field	Description
Description	Enter a description for the storage preference.
To View Strategy Click here	<div>Choose  to view or set up Putaway Strategy. For more details on setting up a putaway strategy see <a href="#">Setting Up Putaway Strategy for Multi-SKU/Multi-Level Containers - Cases</a>.</div> <div>Note: Putaway strategy may be specified for the putaway preferences after the preference is saved.</div>


**Table 4–10 Storage Preference Details : Multi-SKU/Multi-Level Container - Case Tab**

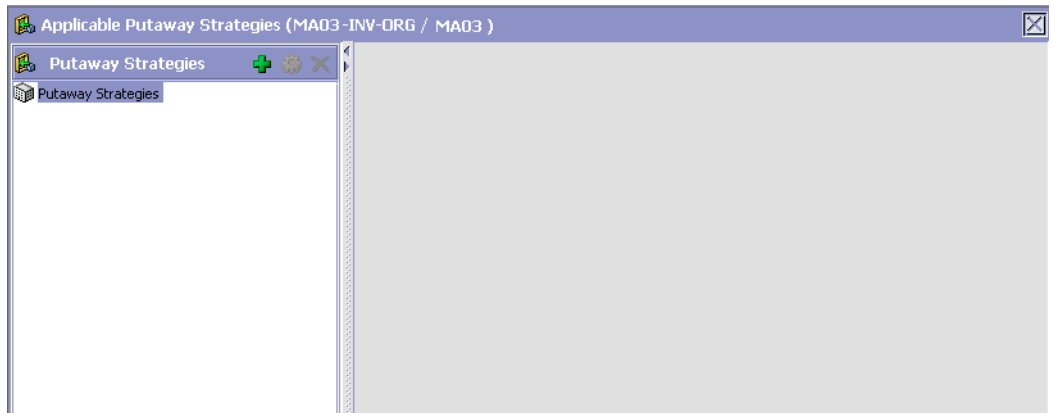
Field	Description
Activity Code	This indicates the activity code for the storage preference.
Requesting Activity Group	Choose the requesting activity group.
<b>Zone Priorities</b>	
Priority	<p>Enter a number to represent the priority.</p> <p>The priority is used to sequence the order in which the zone priorities are evaluated. For example, all storage code level priorities are to be evaluated first before generic priorities.</p> <p>The priority needs to be a positive integer, greater than zero. This is mandatory.</p>
Zone	<p>Choose the relevant zone to be used as the target zone for putaway.</p> <p>This is a mandatory field.</p>
Storage Code	<p>Choose the storage code for the zone, if applicable.</p> <p>This limits the locations being evaluated to the storage code specified. For example, putaway of hazardous items into a zone are restricted to the locations having the appropriate storage code.</p>



### Setting Up Putaway Strategy for Multi-SKU/Multi-Level Containers - Cases

You can set up putaway strategies to putaway applicable inventory from a source zone to a target zone, based on the strategy specified.

To set up putaway strategy for multi-SKU/multi-level container cases:

1. In the Storage Preference Details: Multi-SKU/multi-level Containers: Case window, choose .
2. The Applicable Putaway Strategies window is displayed.



3. Choose  in the Putaway Strategies panel. The Putaway Strategy Details window appears in the right panel.
4. Enter information in the applicable fields. See the Putaway Strategy Details Window table for field value descriptions.
5. Choose .

Putaway Strategy Details

DescriptionStrategy for DVD-LockAndKey-EACHUOMCASE

Item Classification

Product LineDVD

StorageTypeLockAndKey

Product Line

System Directed Putaway Task Types

	Source Zone	Target Zone	Container Type	Task Type
*				

Results 0 Of 0

Ad Hoc Task Types




	Source Zone	Target Zone	Container Type	Task Type
*				

Results 0 Of 0

Table 4–11 Putaway Strategy Details Window



Field	Description
Description	Enter a description for the Putaway Strategy.
UOM	Select the UOM for the Putaway Strategy, if applicable. Note: The UOM will be defaulted in instances where it has been specified in the Putaway Preference Details screen.

**Table 4–11 Putaway Strategy Details Window**

Field	Description
<b>Item Classification</b>	List of putaway item classifications for the Enterprise are displayed. An example, Product Line is shown below.
Product Line	Choose relevant product line item classification for the putaway activity.  Choose  . In the Classification Values window, select the applicable product line classification.
<b>System Directed Putaway Task Types</b>	<b>Displays the list of existing system directed putaway task types.</b>  <b>You may use  to delete an existing system directed putaway task type.</b>
Source Zone	Select the source zone where inventory is available.
Target Zone	Select the target zone where you want to move the inventory.
Container Type	Select the container type to be used to move the inventory from the source zone to the target zone. Typical values are Case and Pallet.
Task Type	Select the Putaway Task Type applicable to this putaway strategy. This field displays the list of existing system directed task types that belong to the 'PUTAWAY' activity group.
<b>Ad hoc Task Types</b>	<b>Displays the list of existing ad hoc task types.</b>  <b>You may use  to delete an existing ad hoc task type.</b>
Source Zone	Select the source zone where inventory is available.
Target Zone	Select the target zone where you want to move the inventory.
Container Type	Select the container type to be used to move the inventory from the source zone to the target zone. Typical values are Case and Pallet.
Task Type	Select the Putaway Task Type applicable to this putaway strategy. This field displays the list of existing ad hoc task types that belong to the 'PUTAWAY' activity group.


### 4.5.2.2 Modifying a Storage Preference for Multi-SKU/Multi-Level Container

To modify a storage preference for multi-SKU/multi-level container:

1. From the tree in the application rules side panel, choose Inventory > Storage Preferences. The Storage Preferences window is displayed.
2. In the Storage Preferences window, choose the Multi-SKU/Multi-Level Container tab. The Multi-SKU/Multi-Level Container tab window for Storage Preferences is displayed.
3. In the Multi-SKU/Multi-Level Container tab window (Pallet or Case tab), choose the Storage Preference that is to be modified.
4. Choose . The Storage Preference Details window is displayed.
5. Enter information in the applicable fields. For more information about modifying the fields, see [Section 4.5.2.1.1, "Setting Up Storage Preferences for Multi-Level Pallets"](#) on page 148 and [Section 4.5.2.1.2, "Setting Up Storage Preferences for Multi-Level Cases"](#) on page 154.
6. Choose .

### 4.5.2.3 Deleting a Storage Preference for Multi-SKU/Multi-Level Container

To delete an storage preference for multi-SKU/multi-level container:

1. From the tree in the application rules side panel, choose Inventory > Storage Preferences. The Storage Preferences window is displayed.
2. In the Storage Preferences window, choose the Multi-SKU/Multi-Level Container tab. The Multi-SKU/Multi-Level Container tab window for Storage Preferences is displayed.
3. In the Multi-SKU/Multi-Level Container tab window (Pallet or Case tab), choose the Storage Preference that is to be deleted.
4. Choose .

### 4.5.3 Setting Up Storage Preferences for Container with Unknown Contents

The storage preference details of a case or pallet with unknown contents are specified here.

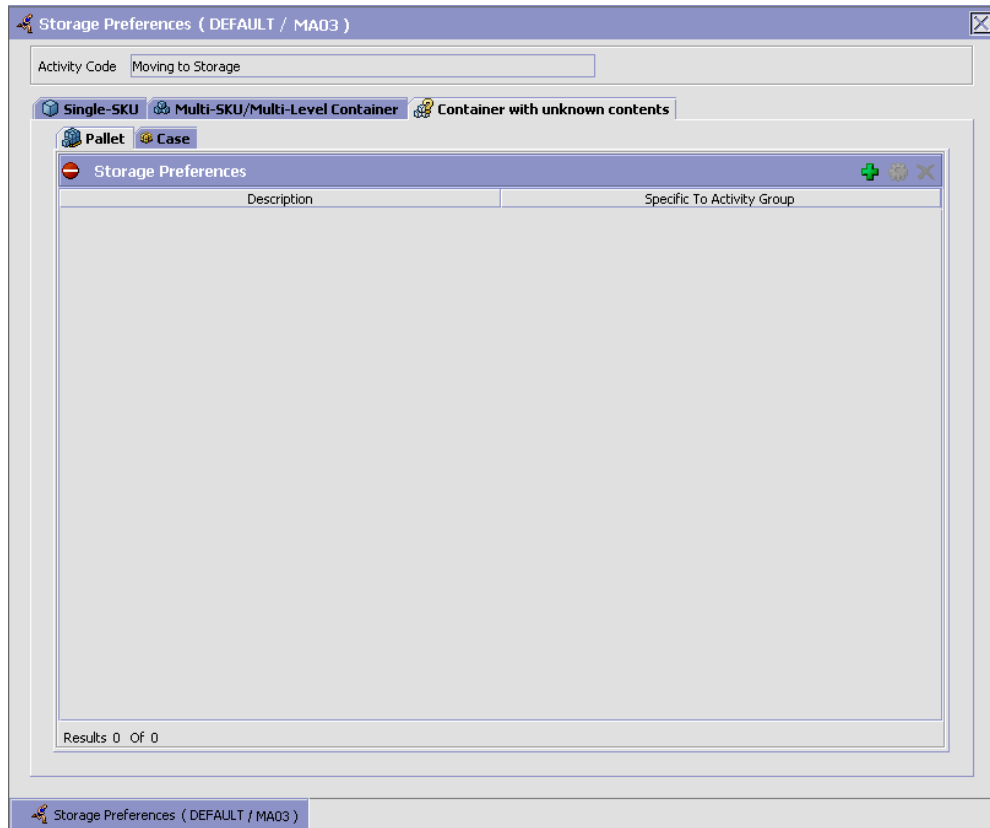
Use the Storage Preferences for Container with Unknown Contents set-up for:

- [Creating a Storage Preference for Container with Unknown Contents](#)
- [Modifying a Storage Preference for Container with Unknown Contents](#)
- [Deleting a Storage Preference for Container with Unknown Contents](#)

#### **4.5.3.1 Creating a Storage Preference for Container with Unknown Contents**

To create a storage preference for container with unknown contents:

1. From the tree in the application rules side panel, choose Inventory > Storage Preferences. The Storage Preferences window is displayed.
2. In the Storage Preferences window, choose the Container with Unknown Contents tab. The Container with Unknown Contents tab window for Storage Preferences is displayed.





Storage Preferences for cases or pallets are specified separately:

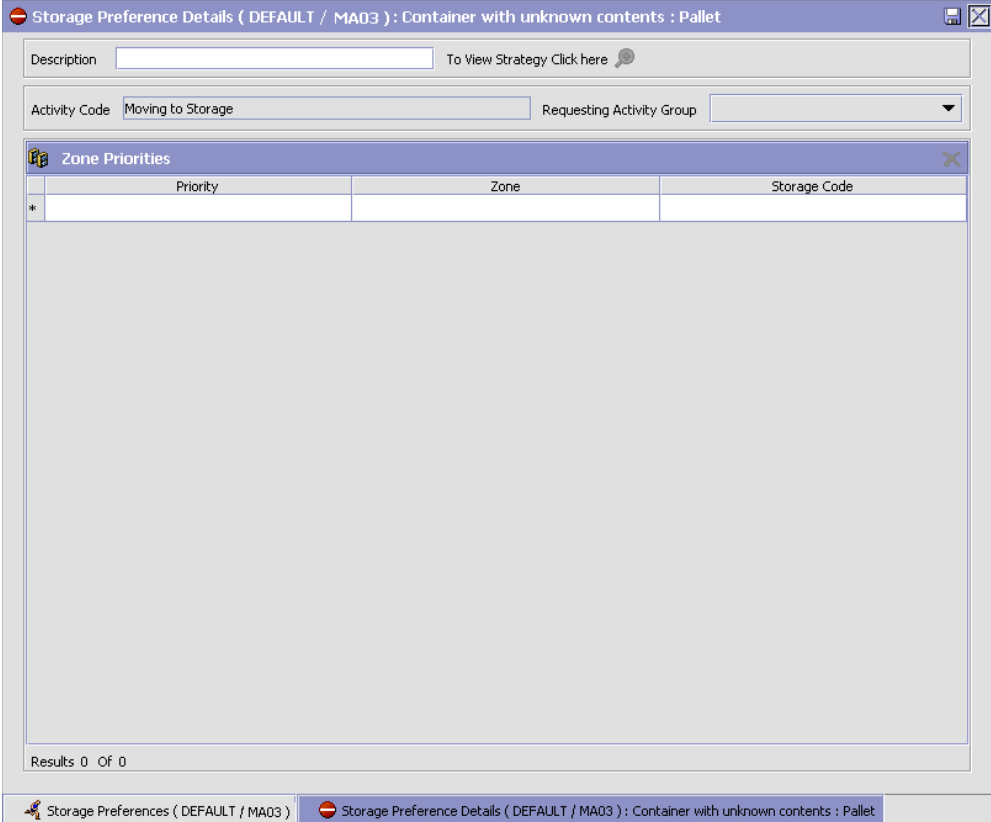
- [Setting Up Storage Preferences for Container with Unknown Contents - Pallets](#)
- [Setting Up Storage Preferences for Container with Unknown Contents - Cases](#)

#### 4.5.3.1.1 Setting Up Storage Preferences for Container with Unknown Contents - Pallets


To set up storage preferences for container with unknown contents - pallets:



1. In the Container with Unknown Contents tab of Storage Preferences window, choose the Pallet tab. The Pallet tab window is displayed.
2. In the Pallet tab window, choose .
3. The Storage Preference Details window appears.
4. Enter information in the applicable fields. Refer [Table 4–12](#) for field value descriptions.
5. Choose .



Storage Preference Details ( DEFAULT / MA03 ) : Container with unknown contents : Pallet

Description  To View Strategy Click here 


Activity Code  Requesting Activity Group

Zone Priorities		
Priority	Zone	Storage Code
*		

Results 0 Of 0

Storage Preferences ( DEFAULT / MA03 ) Storage Preference Details ( DEFAULT / MA03 ) : Container with unknown contents : Pallet


**Table 4–12 Storage Preference Details : Container with Unknown Contents - Pallet Tab**

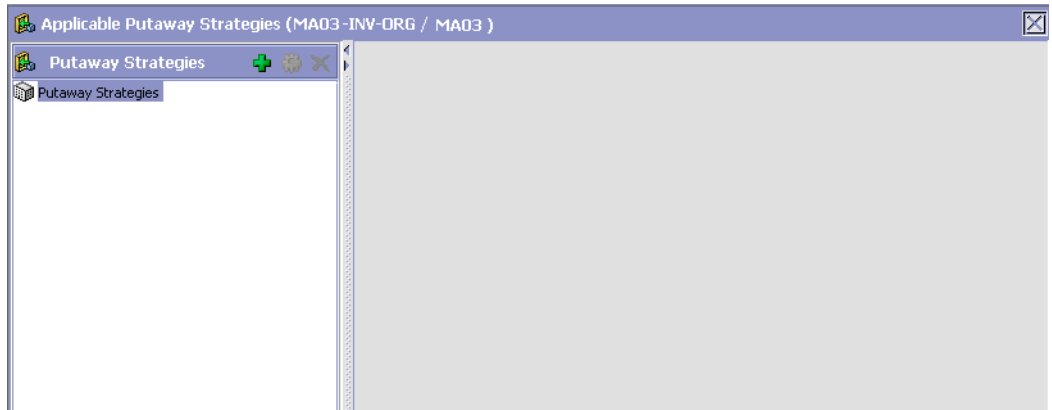
Field	Description
Description	Enter a description for the storage preference.
To View Strategy Click here	<p>Choose  to view or set up Putaway Strategy. For more details on setting up a putaway strategy see <a href="#">Setting Up Putaway Strategy for Containers with Unknown Contents - Pallets</a>.</p> <p>Note: Putaway strategy may be specified for the putaway preferences after the preference is saved.</p>
Activity Code	This indicates the activity code for the storage preference.
Requesting Activity Group	Choose the requesting activity group.
<b>Zone Priorities</b>	
Priority	<p>Enter a number to represent the priority.</p> <p>The priority is used to sequence the order in which the zone priorities are evaluated. For example, all storage code level priorities are to be evaluated first before generic priorities.</p> <p>The priority needs to be a positive integer, greater than zero. This is mandatory.</p>
Zone	<p>Choose the relevant zone to be used as the target zone for putaway.</p> <p>This is a mandatory field.</p>
Storage Code	<p>Choose the storage code for the zone, if applicable.</p> <p>This limits the locations being evaluated to the storage code specified. For example, putaway of hazardous items into a zone are restricted to the locations having the appropriate storage code.</p>



### Setting Up Putaway Strategy for Containers with Unknown Contents - Pallets

You can set up putaway strategies to putaway applicable inventory from a source zone to a target zone, based on the strategy specified.

To set up putaway strategy for container with unknown content - pallets:

1. In the Storage Preference Details: Container with unknown contents - Pallet window, choose .
2. The Applicable Putaway Strategies window is displayed.



3. Choose  in the Putaway Strategies panel. The Putaway Strategy Details window appears in the right panel.
4. Enter information in the applicable fields. See the Putaway Strategy Details Window table for field value descriptions.
5. Choose .

Putaway Strategy Details

DescriptionStrategy for DVD-LockAndKey-EACHUOMCASE

Item Classification

Product LineDVD

StorageTypeLockAndKey

Product Line

System Directed Putaway Task Types

	Source Zone	Target Zone	Container Type	Task Type
*				

Results 0 Of 0

Ad Hoc Task Types




	Source Zone	Target Zone	Container Type	Task Type
*				

Results 0 Of 0

Table 4–13 Putaway Strategy Details Window

Field	Description
Description	Enter a description for the Putaway Strategy.
UOM	Select the UOM for the Putaway Strategy, if applicable. Note: The UOM will be defaulted in instances where it has been specified in the Putaway Preference Details screen.

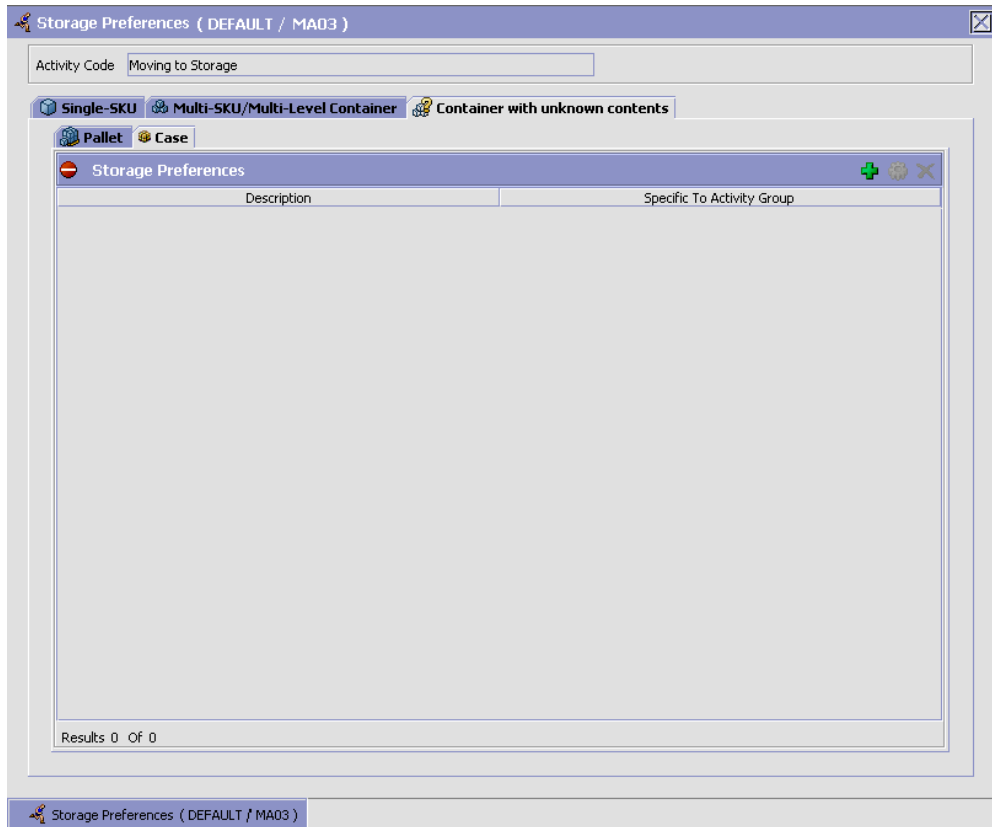
**Table 4–13 Putaway Strategy Details Window**


Field	Description
<b>Item Classification</b>	List of putaway item classifications for the Enterprise are displayed. An example, Product Line is shown below.
Product Line	Choose relevant product line item classification for the putaway activity.  Choose  . In the Classification Values window, select the applicable product line classification.
<b>System Directed Putaway Task Types</b>	<b>Displays the list of existing system directed putaway task types.</b>  <b>You may use  to delete an existing system directed putaway task type.</b>
Source Zone	Select the source zone where inventory is available.
Target Zone	Select the target zone where you want to move the inventory.
Container Type	Select the container type to be used to move the inventory from the source zone to the target zone. Typical values are Case and Pallet.
Task Type	Select the Putaway Task Type applicable to this putaway strategy. This field displays the list of existing system directed task types that belong to the 'PUTAWAY' activity group.
<b>Ad hoc Task Types</b>	<b>Displays the list of existing ad hoc task types.</b>  <b>You may use  to delete an existing ad hoc task type.</b>
Source Zone	Select the source zone where inventory is available.
Target Zone	Select the target zone where you want to move the inventory.
Container Type	Select the container type to be used to move the inventory from the source zone to the target zone. Typical values are Case and Pallet.
Task Type	Select the Putaway Task Type applicable to this putaway strategy. This field displays the list of existing ad hoc task types that belong to the 'PUTAWAY' activity group.


### 4.5.3.1.2 Setting Up Storage Preferences for Container with Unknown Contents - Cases

To set up storage preferences for container with unknown contents - cases:

1. In the Container with Unknown Contents tab of Storage Preferences window, choose the Case tab. The Case tab window is displayed.




2. In the Case tab window, choose .
3. The Storage Preference Details window appears.
4. Enter information in the applicable fields. Refer [Table 4–14](#) for field value descriptions.

5. Choose .

Storage Preference Details ( DEFAULT / MA03 ) : Container with unknown contents : Case

Description

To View Strategy Click here 

Activity Code

Moving to Storage

Requesting Activity Group

Zone Priorities


	Priority	Zone	Storage Code
*			

Results 0 Of 0

Storage Preferences ( DEFAULT / MA03 )

Storage Preference Details ( DEFAULT / MA03 ) : Container with unknown contents : Case

**Table 4–14 Storage Preference Details : Container with Unknown Contents - Case Tab**


Field	Description
Description	Enter a description for the storage preference.
To View Strategy Click here	<p>Choose  to view or set up Putaway Strategy. For more details on setting up a putaway strategy see <a href="#">Setting Up Putaway Strategy for Containers with Unknown Contents - Cases</a>.</p> <p>Note: Putaway strategy may be specified for the putaway preferences after the preference is saved.</p>
Activity Code	This indicates the activity code for the storage preference.
Requesting Activity Group	Choose the requesting activity group.
<b>Zone Priorities</b>	
Priority	<p>Enter a number to represent the priority.</p> <p>The priority is used to sequence the order in which the zone priorities are evaluated. For example, all storage code level priorities are to be evaluated first before generic priorities.</p> <p>The priority needs to be a positive integer, greater than zero. This is mandatory.</p>
Zone	<p>Choose the relevant zone to be used as the target zone for putaway.</p> <p>This is a mandatory field.</p>
Storage Code	<p>Choose the storage code for the zone, if applicable.</p> <p>This limits the locations being evaluated to the storage code specified. For example, putaway of hazardous items into a zone are restricted to the locations having the appropriate storage code.</p>

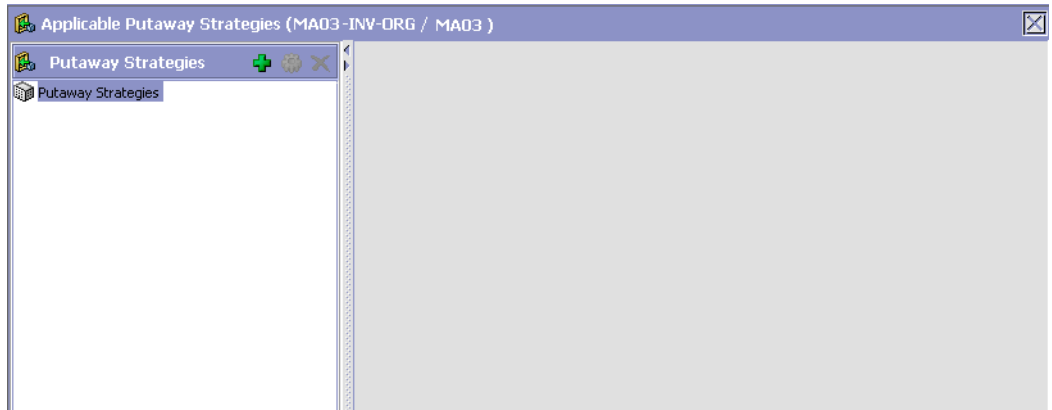
### Setting Up Putaway Strategy for Containers with Unknown Contents - Cases



You can set up putaway strategies to putaway applicable inventory from a source zone to a target zone, based on the strategy specified.



To set up putaway strategy for container with unknown content - cases:

1. In the Storage Preference Details: Container with unknown contents: Case window, choose .
2. The Applicable Putaway Strategies window is displayed.



3. Choose  in the Putaway Strategies panel. The Putaway Strategy Details window appears in the right panel.
4. Enter information in the applicable fields. See the Putaway Strategy Details Window table for field value descriptions.
5. Choose .

Putaway Strategy Details

DescriptionStrategy for DVD-LockAndKey-EACHUOMCASE

Item Classification

Product LineDVD

StorageTypeLockAndKey

Product Line

System Directed Putaway Task Types

	Source Zone	Target Zone	Container Type	Task Type
*				

Results 0 Of 0

Ad Hoc Task Types




	Source Zone	Target Zone	Container Type	Task Type
*				

Results 0 Of 0

Table 4–15 Putaway Strategy Details Window

Field	Description
Description	Enter a description for the Putaway Strategy.
UOM	Select the UOM for the Putaway Strategy, if applicable. Note: The UOM will be defaulted in instances where it has been specified in the Putaway Preference Details screen.



**Table 4–15 Putaway Strategy Details Window**

Field	Description
<b>Item Classification</b>	List of putaway item classifications for the Enterprise are displayed. An example, Product Line is shown below.
Product Line	<p>Choose relevant product line item classification for the putaway activity.</p> <p>Choose . In the Classification Values window, select the applicable product line classification.</p>
<b>System Directed Putaway Task Types</b>	<p><b>Displays the list of existing system directed putaway task types.</b></p> <p><b>You may use  to delete an existing system directed putaway task type.</b></p>
Source Zone	Select the source zone where inventory is available.
Target Zone	Select the target zone where you want to move the inventory.
Container Type	Select the container type to be used to move the inventory from the source zone to the target zone. Typical values are Case and Pallet.
Task Type	Select the Putaway Task Type applicable to this putaway strategy. This field displays the list of existing system directed task types that belong to the 'PUTAWAY' activity group.
<b>Ad hoc Task Types</b>	<p><b>Displays the list of existing ad hoc task types.</b></p> <p><b>You may use  to delete an existing ad hoc task type.</b></p>
Source Zone	Select the source zone where inventory is available.
Target Zone	Select the target zone where you want to move the inventory.
Container Type	Select the container type to be used to move the inventory from the source zone to the target zone. Typical values are Case and Pallet.
Task Type	Select the Putaway Task Type applicable to this putaway strategy. This field displays the list of existing ad hoc task types that belong to the 'PUTAWAY' activity group.

### 4.5.3.2 Modifying a Storage Preference for Container with Unknown Contents


Once an Storage Preference for Container with Unknown Contents has been created, it can be modified.

To modify an storage preference for container with unknown contents:

1. From the tree in the application rules side panel, choose Inventory > Storage Preferences. The Storage Preferences window is displayed.
2. In the Storage Preferences window, choose the Container with Unknown Contents tab. The Container with Unknown Contents tab window for Storage Preferences is displayed.
3. In the Container with Unknown Contents tab window (Pallet or Case tab), choose the Storage Preference that is to be modified.
4. Choose . The Storage Preference Details window is displayed.
5. Enter information in the applicable fields. For more information about modifying the fields, see [Section 4.5.3.1.1, "Setting Up Storage Preferences for Container with Unknown Contents - Pallets"](#) on page 162 and [Section 4.5.3.1.2, "Setting Up Storage Preferences for Container with Unknown Contents - Cases"](#) on page 168.
6. Choose .

### 4.5.3.3 Deleting a Storage Preference for Container with Unknown Contents

To delete a storage preference for container with unknown contents:

1. From the tree in the application rules side panel, choose Inventory > Storage Preferences. The Storage Preferences window is displayed.
2. In the Storage Preferences window, choose the Container with Unknown Contents tab. The Container with Unknown Contents tab window for Storage Preferences is displayed.
3. In the Container with Unknown Contents tab window (Pallet or Case tab), choose the Storage Preference that is to be deleted.
4. Choose .

## 4.6 Defining Replenishment Strategy

When a product is removed from a location in the forward pick zones of the warehouse, the inventory in that location needs to be replenished from bulk zones. In Yantra 7x, demand-based replenishment is initiated during the wave release process.

If there is no inventory available at pick zones that are defined in the PLA rule, system tries to replenish these locations from bulk zones, provided these locations are dedicated or dynamically slotted locations and replenishment strategy is defined to replenish these locations.

Pick tasks are suggested as and when replenishment tasks are completed.

A replenishment strategy can be created for one or more zones to be replenished. The strategy also defines the zones from which inventory is retrieved to fulfill the replenishment requests.

### Example

A dedicated location L1 in active zone A1 has a capacity of 2 pallets. A pallet is made up of 20 cases. Each case is made up of 10 units.

A replenishment request is made for 223 units.

This request can be broken down as follows:

- 1 Pallet
- 2 Cases
- 3 Each

In this scenario you would want to retrieve the pallet from a pallet storage zone (P1) and retrieve the cases and individual units (each) from a case storage zone (C1).

In this example, you can use Yantra 7x to define a replenishment strategy for zone A1. This can be done by specifying Zone C1 to be used for both Each and Case units of measure and Zone P1 to be used for the Pallet unit of measure.



---

**Note:** Within replenishment strategies, the replenishment demand can only be broken down into two sets of units of measure. Further, only two sets of retrieval zones can be defined for each set of units of measure.

---

### 4.6.1 Creating a Replenishment Strategy

To create a replenishment strategy:

1. From the tree in the application rules side panel, choose Inventory > Replenishment Strategy. The Replenishment window is displayed in the work area.
2. From the All Strategies tree, choose . The Replenishment Strategy Details window is displayed in the right frame of the Replenishment window.
3. Enter information in the applicable fields. Refer to [Table 4–16](#) for field value descriptions.
4. Choose .

Replenishment ( MA03 )

Strategies + - >>

All Strategies

Replenishment Strategy Details

Description

Zones to Replenish

When unit of measure is in

Then, first search in

If sufficient inventory is not found, search remainder in

Otherwise, when unit of measure is in

Then, first search in





If sufficient inventory is not found, search remainder in

Replenishment ( MA03 )

**Table 4–16 Replenishment Strategy Details Window**



Field	Description
Description	Enter a description of the replenishment strategy.
Zones to Replenish	<p>You must specify one or more zones that this replenishment rule applies to.</p> <p>Choose . The List of Values pop-up window is displayed. Select the blank line and choose a zone that you want to apply this replenishment strategy to from the drop-down menu. When you have finished adding zones, choose OK.</p>

**Table 4–16 Replenishment Strategy Details Window**

Field	Description
When unit of measure is in	<p>You must specify the unit(s) of measure that you want to be replenished in the specified zones. For example, if there is a zone in which you perform loose picking for the unit of measure of EACH for a particular item, you would want to ensure that the EACH unit of measure is replenished.</p> <p>Choose . The List of Values pop-up window is displayed. Choose the unit of measure you want to replenish for the specified zones from the drop-down menu. When you have finished adding units of measure, choose OK.</p>
Then, first search in	<p>You must specify the retrieval algorithm to be used to retrieve inventory for replenishment. This algorithm is run first and identifies the optimal location to retrieve inventory from.</p> <p>Choose . The Replenish From window is displayed. Refer to <a href="#">Replenish From Pop-Up Window</a> for a description of this window and field value descriptions.</p>
If sufficient inventory is not found, search remainder in	<p>If there was not enough inventory found for replenishment using the first algorithm, you can define another algorithm to be used to locate the remaining inventory.</p> <p>Choose . The Replenish From window is displayed. Refer to <a href="#">Replenish From Pop-Up Window</a> for a description of this window and field value descriptions.</p>
Otherwise, when unit of measure is in	<p>If there are other units of measure in need of replenishing in the specified zones for which you want to use different retrieval algorithms, you can specify them here.</p> <p>Choose . The List of Values pop-up window is displayed. Choose the unit of measure you want to replenish for the specified zones from the drop-down menu. When you have finished adding units of measure, choose OK.</p>



**Table 4–16 Replenishment Strategy Details Window**

Field	Description
Then, first search in	<p>You must specify the retrieval algorithm to be used to retrieve inventory for replenishment. This algorithm is run first and identifies the optimal location to retrieve inventory from.</p> <p>Choose . The Replenish From window is displayed. Refer to <a href="#">Replenish From Pop-Up Window</a> for a description of this window and field value descriptions.</p>
If sufficient inventory is not found, search remainder in	<p>If there was not enough inventory found for replenishment using the first algorithm, you can define another algorithm to be used to locate the remaining inventory.</p> <p>Choose . The Replenish From window is displayed. Refer to <a href="#">Replenish From Pop-Up Window</a> for a description of this window and field value descriptions.</p>

The first step is to determine the quantity to replenish, based on the demand for an item. Yantra 7x WMS replenishment strategy allows you to optimize replenishment based on the item's unit of measure, and the capacity of the location to be replenished. The location to replenish from is determined based on the demand quantity using the strategy specified.

The next step is to determine the quantity to replenish to the location. Using round off, round up the demand quantity to the higher unit of measure specified in the strategy. Also, consider the available capacity of the destination location and the quantity available in the location to replenish.

The above steps optimize the quantity to replenish, allowing for reduced replenishment on subsequent waves.

The number of locations to replenish from are not increased due to excess capacity available at the location to replenish. This is illustrated through the following example:

Let us consider that A1 is a dedicated location with maximum capacity 100, where the current quantity is 5. The demand is 20. A CASE contains 25, while a PALLET contains 50 (2 cases). The round-up level chosen are CASE and PALLET, and the respective zones are configured not to split

the appropriate UOM. The inventory in location L1 is 50, location L2 is 100, and Location L3 is 25.

In this context, Yantra 7x will not select an additional location to satisfy capacity at the location being replenished due to the following constraints:

- Consider that L1, L2, L3 are in the CASE zone. If location L1 is chosen to replenish from, 50 is replenished. If location L2 is chosen to replenish from, 75 is replenished and if location L3 is chosen, 25 is replenished.
- Now consider that Location L1 and L2 are in PALLET zone. If L1 is chosen to replenish from, 50 is replenished. If L2 is chosen, 100 is replenished overflowing the location.


### Replenish From Pop-Up Window

The Replenish From pop-up window is used to define the location picking algorithm. This algorithm is then used to retrieve the applicable inventory for the specified units of measure and replenish inventory in the zones specified in the replenishment strategy.

**Replenish From**

Description


Select locations using following algorithm

Select locations having inventory from these zones 


Optimize retrieval using ☒ Pick to clean ☐ Least number of trips

Round up quantity in a trip when possible to

☐ Case ☐ Each  
☐ Half Pallet ☐ Inner Pack  
☐ Pallet


When inventory is not found, select inbound shipments that are 

Task Creation



Task Type  

OK Cancel

**Table 4–17 Replenish From Pop-Up Window**



Field	Description
Description	Enter a description of the algorithm.
Select locations using following algorithm	
Select locations having inventory from these zones	<p>You can specify zones to look for inventory. If inventory is available, they can be used to replenish from.</p> <p>Choose . The List of Values pop-up window is displayed. Select the blank line and choose a zone from the drop-down menu. When you have finished adding zones, choose OK.</p>
Optimize retrieval using	<p>Choose Least Number of Trips if you want to optimize the algorithm on making the least number of trips while retrieving inventory for replenishment.</p> <p>Choose Pick to Clean if you want the algorithm to locate a source for inventory replenishment and pick from it until there is no inventory available at that location.</p> <p>Here, Pick to Clean is not a literal pick to clean, but a combination of both 'least number of trips' and 'pick to clean' approach.</p>
Round up quantity in a trip when possible to	<p>Select the unit of measure to round up to when retrieving inventory for replenishment. The round up will occur only in instances when there is sufficient inventory.</p> <p>For example, there is an item that is picked by EACH that needs to be replenished. 9 EACH needs to be replenished. 12 EACH make a CASE. If you select Case for this field, the algorithm rounds the unit of measure for this retrieval task from 9 EACH to 1 CASE.</p>

**Table 4–17 Replenish From Pop-Up Window**

Field	Description
When inventory is not found, select inbound shipments that are	<p>If there is no inventory available in the defined zones, the algorithm can be configured to look for inventory in inbound shipments that are in a defined status. The system only looks for inventory in inbound shipments that are in the status(es) you specify.</p> <p>Choose . The List of Values pop-up window is displayed. Select the blank line and choose an inbound shipment status from the drop-down menu. When you have finished adding shipment status, choose OK.</p>
Task Creation	
Task Type	<p>Choose the applicable task type.</p> <p>Choose  to create a new task type. For more information about Task Type, see <a href="#">Section 12.3, "Defining Task Types"</a> on page 887.</p>


### 4.6.2 Modifying a Replenishment Strategy

To modify a replenishment strategy:

1. From the tree in the application rules side panel, choose Inventory > Replenishment Strategy. The Replenishment window appears in the work area.
2. From the All Strategies tree, select the replenishment strategy you want to modify and choose . The Replenishment Strategy Details window is displayed in the right frame of the Replenishment window.
3. Enter information in the applicable fields. Refer to [Table 4–16](#) for field value descriptions.
4. Choose .

### 4.6.3 Deleting a Replenishment Strategy

To delete a replenishment strategy:

1. From the tree in the application rules side panel, choose Inventory > Replenishment Strategy. The Replenishment window appears in the work area.
2. From the All Strategies tree, select the replenishment strategy you want to delete and choose .

## 4.7 Defining Monitoring Rules

Locations in a warehouse need to be monitored for various reasons. For example, a location needs to be replenished based on the demand placed on it and the individual trigger levels for an item dedicated to it.

Location Monitoring Rules are set up to monitor inventory levels at zones for an Enterprise, Product Class, and Item Classification. You can monitor Inventory levels depending on the size of locations and raise alerts based on these rules.

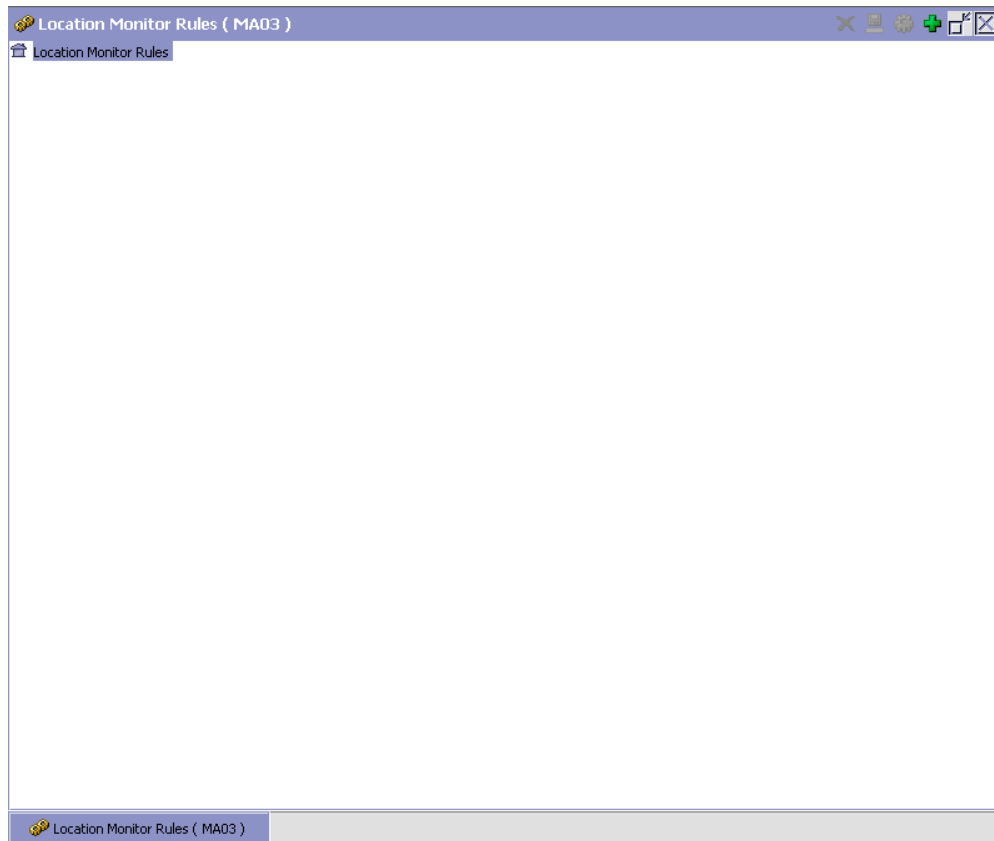
Use Monitoring Rules for:



- [Creating a Monitoring Rule](#)
- [Creating a New Monitoring Rule from an Existing Monitoring Rule](#)
- [Modifying a Monitoring Rule](#)
- [Deleting a Monitoring Rule](#)

### 4.7.1 Creating a Monitoring Rule

To create a monitoring rule:

1. From the tree in the application rules side panel, choose Inventory > Monitoring Rules. The Location Monitor Rules window is displayed.



2. In the Location Monitor Rules window, choose .
3. The Location Monitor Rule Details pop-up window appears.
4. Enter information in the applicable fields. Refer [Table 4–18](#) for field value descriptions.
5. Choose .

**Location Monitor Rule Details**

**Monitor Rule**

Rule ID 
Description

**Zones to Monitor**

**Zones\_To\_Monitor**

	Zone	Location Size Code
*		

Results 0 Of 6

**Products to Monitor**

Enterprise 
Product Class

Item Classification

**Alert Details**

Event to Monitor 
Re-Alert Time Interval

Minimum Trigger Percentage 
Service To Perform

**Table 4–18 Location Monitor Rule Details Pop-up Window**

Field	Description
<b>Monitor Rule</b>	
Rule ID	Enter a name for the location monitor rule being created.
Description	Enter a description for the location monitor rule being created.
<b>Zones to Monitor</b>	
Zone	Choose the Zones to be monitored.
Location Size Code	Choose the Location Size Codes relevant to the zones being monitored.
<b>Products to Monitor</b>	
Enterprise	Choose the enterprise whose products are to be monitored.

**Table 4–18 Location Monitor Rule Details Pop-up Window**

Field	Description
Product Class	Choose the product class relevant to the product to be monitored.
<b>Item Classification</b>	Choose item classifications relevant to the product to be monitored.
<b>Alert Details</b>	
Event to Monitor	Choose the event to be monitored. Choose a valid event from the dropdown list. Refer to <a href="#">Table 4–19</a> for assistance.
Re-Alert Time Interval	Enter the re-alert time interval. Re-alert time intervals may be set in terms of Days, Hours, Minutes, or Seconds.
Minimum Trigger Percentage	Enter the minimum trigger percentage. Minimum Trigger Percentage defines the minimum value of the inventory at which the replenishment trigger is to be launched.
Service to Perform	Choose the service to be performed.



**Table 4–19 List of Valid Events**

Events	Services
Location Empty	<p>GenerateCountRequest</p> <p>For example, when locations become empty, you can configure to create a count request to check whether the location is empty.</p> <p>Note: The Location Empty event is applicable only to non-dedicated locations.</p>
Inventory Below Minimum	<p>GenerateMoveRequest</p> <p>For example, when inventory at dedicated locations falls below the user defined minimum trigger percentage, you can configure to create a move request to replenish inventory for locations that use this service.</p> <p>Note: The Inventory Below Minimum event is applicable only to dedicated locations.</p>
Inventory Below Current Demand	<p>GenerateMoveRequest</p> <p>For example, when inventory at locations in the pick zone fall below the current demand, you can configure to create a move request to replenish inventory for locations using this service.</p>
Inventory Above Current Demand	<p>GenerateMoveRequest</p> <p>For example, when inventory at locations in the pick zone are more than the current demand, you can configure to create a move request to putaway additional inventory from the location.</p>



*Table 4–19 List of Valid Events*

Events	Services
Non Dedicated Item in Dedicated Locations	<p>CallCreateException</p> <p>For example, when dedicating locations to specific items, the existing inventory at the location may conflict with the dedication being made. In such cases, you can configure to create an exception and notify users. Or, you can configure to create a move request to put away items offending the dedication.</p>
Inventory Mix Constraints Violated	<p>CallCreateException</p> <p>For example, when overriding a suggested location during the deposition of inventory, due to an exception, the user may violate the do not mix preferences defined for the Zone. In such cases, you can configure to create an exception to raise an alert or create a move request to put away offending items.</p>
Inventory Below Full Capacity	<p>CallCreateException</p> <p>GenerateMoveRequest</p> <p>For example, when inventory at dedicated locations fall below the full capacity, you can configure to create a move request to replenish inventory in these locations.</p>
Non Zero Inventory	<p>CallCreateException</p> <p>For example, by end of day, if inventory is found at the receiving dock, you can configure to raise an alert.</p>

**Note:** When Location Inventory Monitor agent is run for Inventory Below Minimum event, move requests are created in instances where the minimum quantity is less than the sum of current quantity and pend in quantity.



### 4.7.2 Creating a New Monitoring Rule from an Existing Monitoring Rule

To create a new monitoring rule from an existing monitoring rule:

1. From the tree in the application rules side panel, choose Inventory > Monitoring Rules.
2. The Location Monitor Rules window is displayed with the list of existing Monitoring Rules.
3. Select the Monitoring Rule to be copied from. Choose .
4. The Location Monitor Rule Details pop-up window appears.
5. Enter information in the applicable fields. Refer [Table 4–18](#) for field value descriptions.
6. Choose .

### 4.7.3 Modifying a Monitoring Rule


To modify an existing monitoring rule:

1. From the tree in the application rules side panel, choose Inventory > Monitoring Rules.
2. The Location Monitor Rules window is displayed with the list of existing Monitoring Rules.
3. Select the Monitoring Rule to be modified. Choose .
4. The Location Monitor Rule Details pop-up window appears.
5. Enter information in the applicable fields. Refer [Table 4–18](#) for field value descriptions.
6. Choose .

### 4.7.4 Deleting a Monitoring Rule

To delete an existing monitoring rule:

1. From the tree in the application rules side panel, choose Inventory > Monitoring Rules.
2. The Location Monitor Rules window is displayed with the list of existing Monitoring Rules.

3. Select the Monitoring Rule to be deleted.
4. Choose .

## 4.8 Defining Transaction Repository

A repository is a logical collection of entities that define the business process workflow. Transaction Repository includes the following entities:

- Transactions
- Conditions
- Actions
- Services

Yantra 7x provides a base repository for each of the system defined process types. Some of the entities within a repository are copied when creating a new document type. For more information about creating a new document type, see the *Yantra 7x Platform Configuration Guide*.


For more information about defining process type details, see *Yantra 7x Platform Configuration Guide*.

### 4.8.1 Transactions

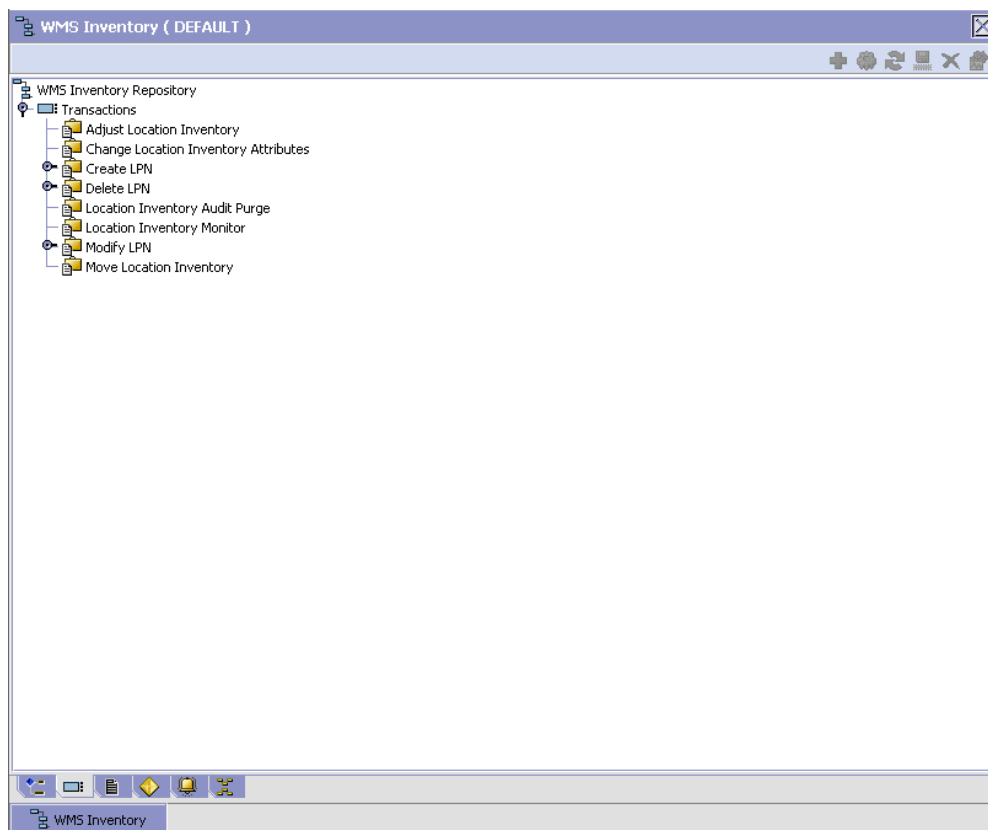
Every process type has a set of base transactions defined for it. A transaction is a logical unit of work that is necessary for performing activity within Yantra 7x. Base transactions are predefined transactions that contain information about how the transaction behaves, such as how many copies of a transaction can be kept in a process type and whether or not it can have configurable base pick and drop statuses. Base transactions can be used to create new transactions. These transactions can be changed within the limits defined in the base transaction.

For more information about Transactions, see *Yantra 7x Platform Configuration Guide*.

To view the transaction repository details for WMS inventory:

1. From the tree in the application rules side panel, choose Inventory > Transaction Repository. The WMS Inventory window is displayed.
2. In the WMS Inventory window, choose .
3. The Transactions tab window is displayed.

For more information about creating and modifying Transactions, see *Yantra 7x Platform Configuration Guide*.



**Table 4–20 WMS Inventory - Transactions Tab Window**

Field	Description
Adjust Location Inventory	This transaction represents the adjustment of location inventory.
Change Location Inventory Attributes	This transaction represents the modification of location inventory attribute.
Create LPN	This transaction represents the creation of an LPN.
Delete LPN	This transaction represents the deletion of an LPN.

**Table 4–20 WMS Inventory - Transactions Tab Window**


Field	Description
Location Inventory Audit Purge	This transaction represents a location inventory audit that may now be purged.
Location Inventory Monitor	This transaction represents the monitoring of the location inventory.
Modify LPN	This transaction represents the modification of an LPN.
Move Location Inventory	This transaction represents the movement of the location inventory.

## 4.8.2 Conditions

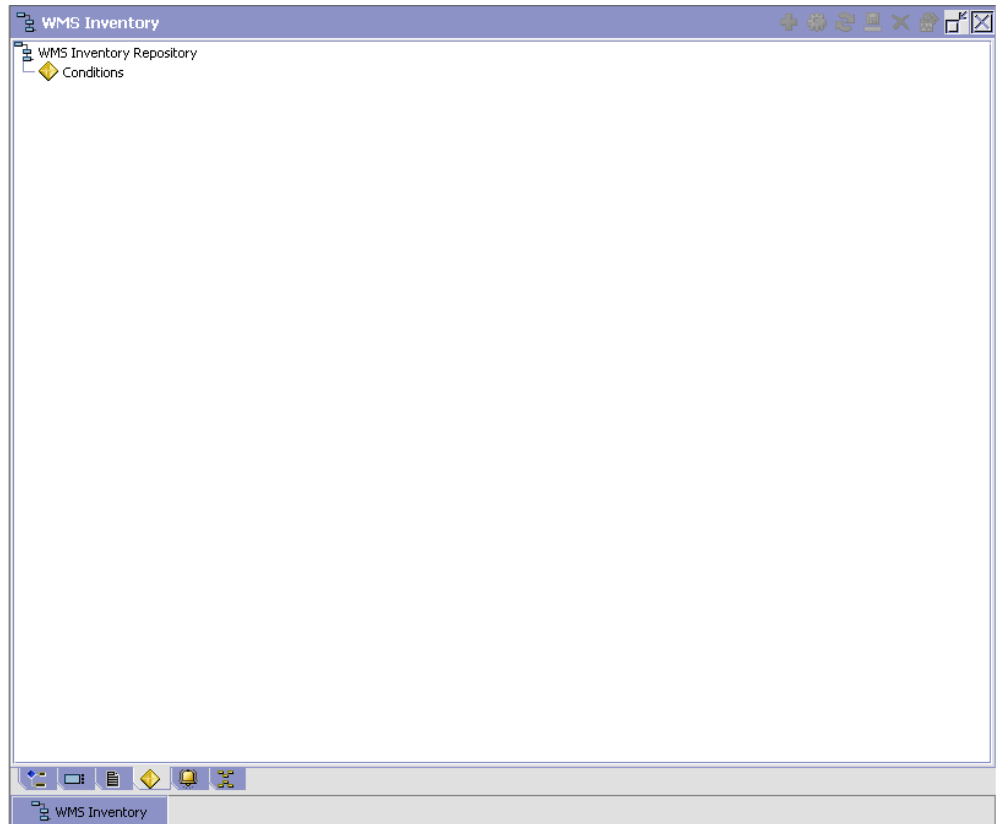
A **condition** matches document type attributes against decision points and routes the documents to different paths based on the specified attribute and value combinations. The document type attributes against which conditions can be created are predefined in Yantra 7x. You can use these attributes in any combination or you can create conditions that execute the appropriate application logic for specific circumstances.

For more information about Conditions, see *Yantra 7x Platform Configuration Guide*.

To view the condition repository details for WMS inventory:

1. From the tree in the application rules side panel, choose Inventory > Transaction Repository. The WMS Inventory window is displayed.
2. In the WMS Inventory window, choose .
3. The Conditions tab window is displayed.

For more information about creating and modifying Conditions, see *Yantra 7x Platform Configuration Guide*.



Yantra 7x WMS default transaction repository does not have any conditions specified.


### 4.8.3 Actions

An **action** is a process or program that is triggered by an event. These processes and programs send user alert notifications and automatically resolve issues.

For example, when a variance task is created (the event), you can set an action to send the enterprise user an e-mail.

For more information about Actions, see *Yantra 7x Platform Configuration Guide*.

To view the action repository details for WMS inventory:

1. From the tree in the application rules side panel, choose Inventory > Transaction Repository. The WMS Inventory window is displayed.
2. In the WMS Inventory window, choose .
3. The Actions tab window is displayed.

For more information about viewing the action repository details, see [Section 3.12.3, "Actions"](#).


For more information about creating and modifying Actions, see *Yantra 7x Platform Configuration Guide*.

### 4.8.4 Service Definitions

Service definitions are a representation of the logic that regulates document workflow services. The Service Builder is a graphical interface that enables you to create a graphical representation of these *services*.

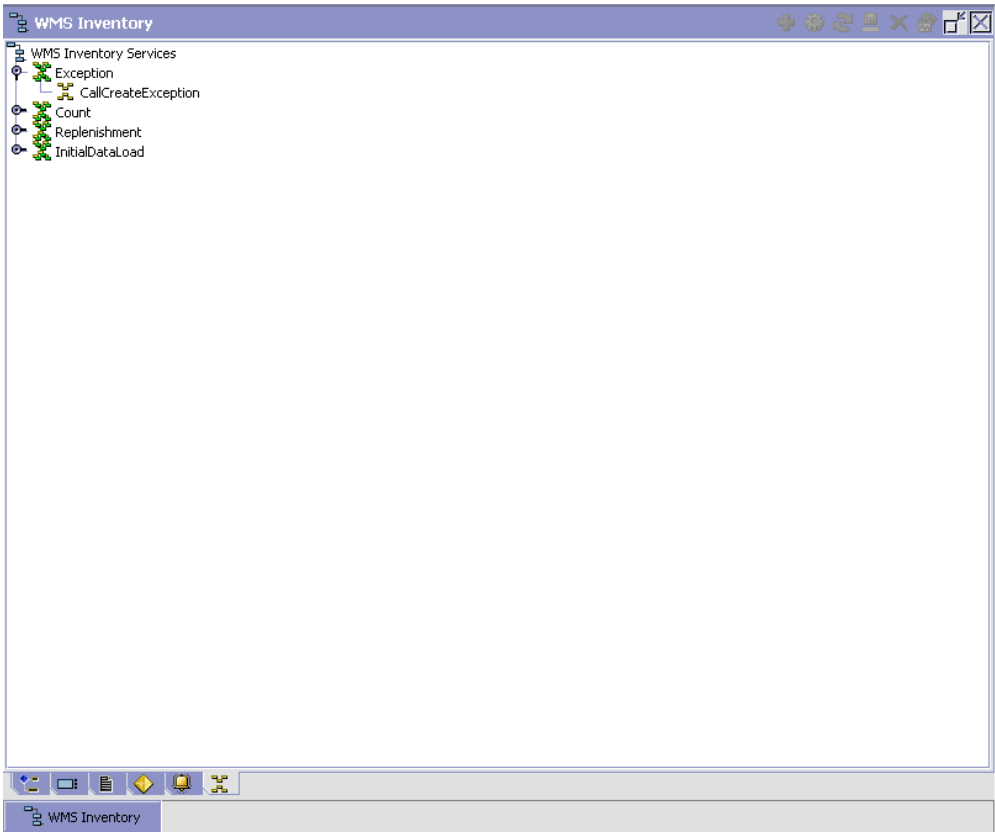
For more information about Service Definitions, see *Yantra 7x Platform Configuration Guide*.

To view the service definition repository details for WMS Inventory:

1. From the tree in the application rules side panel, choose Inventory > Transaction Repository. The WMS Inventory window is displayed.
2. In the WMS Inventory window, choose .
3. The Service Definitions tab window is displayed.

For more information about creating and modifying Service Definitions, see *Yantra 7x Platform Configuration Guide*.





**Table 4–21** *WMS Inventory - Service Definitions Tab Window*

Field	Description
<b>Exception</b>	
CallCreateException	This service is used to create exceptions or alerts for inventory.
<b>Count</b>	
GenerateCountRequest	This service generates the count request for the inventory.
<b>Replenishment</b>	

**Table 4–21 WMS Inventory - Service Definitions Tab Window**

Field	Description
GenerateMoveRequest	This service generates the move request for the inventory.
<b>InitialDataLoad</b>	
Inventory	This service loads inventory information from a flat file to the database. For more information about Initial Data Loading, see <i>Yantra 7x Integration Guide</i> .

## 4.9 Defining Purge Criteria

Transactional data collected by Yantra 7x WMS during execution are periodically removed from the 'live' transactional tables. It is common to retain order related information for extended periods of time. There are history tables provided for relevant transactional tables to move data from the day-to-day 'live' tables to a historical table.



Purge is the process by which old data is removed from the system database. A purge minimizes the number of unused database records to increase search efficiency and reduces the size of the required physical disk.

### 4.9.1 Setting Up Purge Criteria

To set up purge criteria:

1. From the tree in the application rules side panel, choose Inventory > Purge Criteria. The Purge Criteria List window is displayed.

Purge Criteria List ( DEFAULT )		
Purge Code	Purge Description	Retention Days
LOCNINVAUDITPRG	Locn Inv Audit Purge	30
Results 1		
Purge Criteria List ( DEFAULT )		

2. In the Purge Criteria List window, choose . The Purge Criteria Details pop-up window appears.
3. Enter information in the applicable fields. Refer [Table 4–22](#) for field value descriptions.
4. Choose .

**Purge Criteria Details**

Purge Code:  Description:

Rollback Segment:  Retention Days:

☐ Write To Log File Log File Name:

**Table 4–22 Purge Criteria Details Pop-up Window**

Field	Description
Purge Code	Identifies a purge program. This is a system defined code.
Description	Description of the purge.
Rollback Segment	<p>Defines the rollback segment that should be explicitly used for the purge transaction qualified by the purge code.</p> <p>This is useful when there are huge logical data sets that have to be purged. This is optional and used for order related purges.</p>
Retention Days	Enter the number of days of data to be retained in the database (going backwards from the time the program runs). Make sure that your table size takes into account the number of retention days entered here.
Write To Log File	Check this box if you want purged data written to a log. The log can be backed up and used as a journal at a later date.
Log File Name	<p>Enter a log file name. This is applicable only if 'Write To Log File' is checked. This file consists records of the specific table that is purged.</p> <p>The log file is created in the directory specified in the <code>yfs.purge.path</code> of <code>yfs.properties</code>. If a variable is introduced, then <code>yfs.purge.path</code> is ignored. For more information on using variables for the log file directory refer to <i>Yantra 7x Customization Guide</i>.</p> <p>For information about filename limitations related to internationalization, see the <i>Yantra 7x Localization Guide</i>.</p>

## 4.10 Defining Node Item Attributes

Node Item Attributes define the attributes that may be overridden at the Node level. The Item IDs and their respective UOMs that may be set up to be overridden at the node level are defined here.

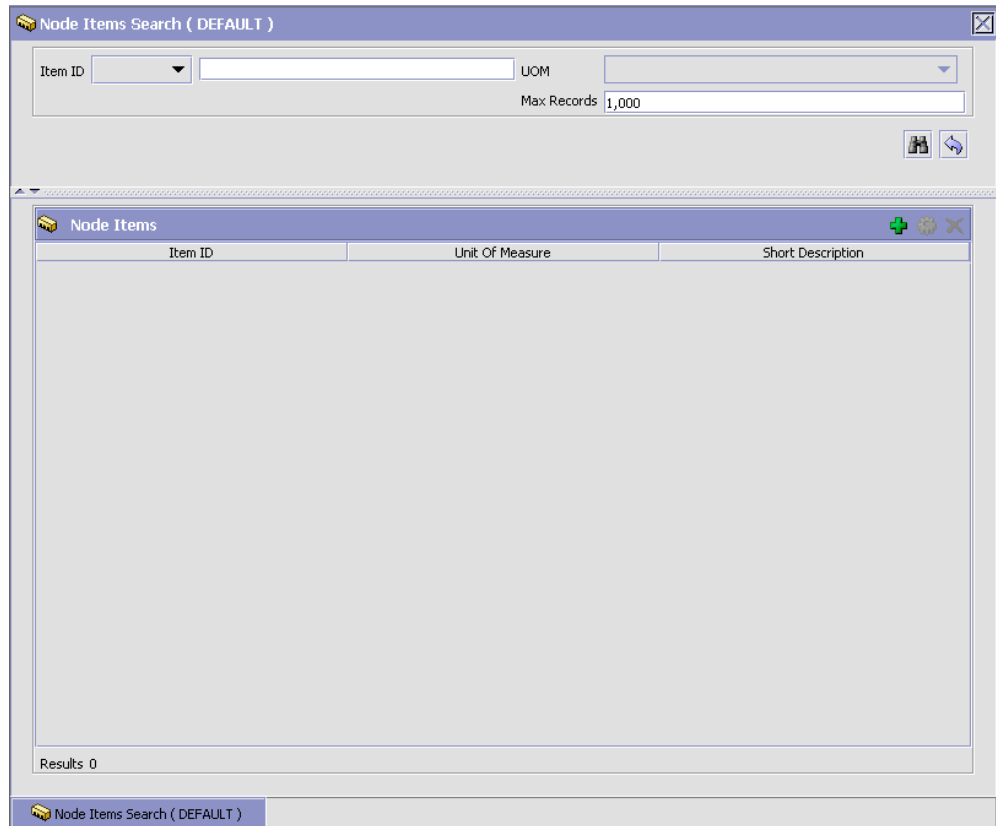
Use Node Item Attributes for:

- [Creating a Node Item Attribute](#)
- [Modifying a Node Item Attribute](#)
- [Deleting a Node Item Attribute](#)



### 4.10.1 Creating a Node Item Attribute

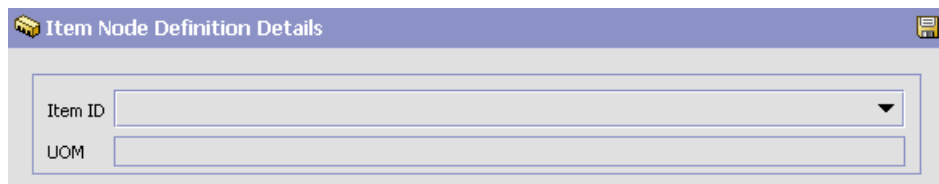
To create a node item attribute:

1. From the tree in the application rules side panel, choose Inventory > Node Item Attributes. The Node Items Search window is displayed.



The screenshot shows the 'Node Items Search (DEFAULT)' window. At the top, there is a search bar with 'Item ID' and 'UOM' dropdown menus, and a 'Max Records' field set to '1,000'. Below the search bar is a large table titled 'Node Items' with columns 'Item ID', 'Unit Of Measure', and 'Short Description'. The table is currently empty, and the status at the bottom left indicates 'Results 0'. A green plus icon is visible in the top right corner of the table area.

2. In the Node Items panel of the Node Items Search window, choose . The Item Node Definition Details pop-up window appears.
3. Enter information in the applicable fields. Refer [Table 4–23](#) for field value descriptions.
4. Choose .



The screenshot shows the 'Item Node Definition Details' window. It contains two input fields: 'Item ID' and 'UOM', each with a dropdown arrow on the right side.





**Table 4–23** *Item Node Definition Details Pop-up Window*

Field	Description
Item ID	Choose the Item ID for the node item definition.
UOM	This indicates the unit of measure for the Item ID selected.  This is automatically populated by the system on selection of the Item ID.

## 4.10.2 Modifying a Node Item Attribute


Once a node item attribute has been created, it may be modified.



To modify a node item attribute:

1. From the tree in the application rules side panel, choose Inventory > Node Item Attributes. The Node Items Search window is displayed.
2. In the Node Items Search panel, enter the applicable search criteria.
3. Choose . The relevant Node Item Attributes are displayed in the Node Items Panel.
4. Choosing  resets the search criteria.
5. Select the Node Item Attribute to be modified. Choose .
6. The Item Node Definition Details pop-up window appears.
7. Enter information in the applicable fields. Refer [Table 4–23](#) for field value descriptions.
8. Choose .

## 4.10.3 Deleting a Node Item Attribute

To delete a node item attribute:

1. From the tree in the application rules side panel, choose Inventory > Node Item Attributes. The Node Items Search window is displayed.
2. In the Node Items Search panel, enter the applicable search criteria.
3. Choose . The relevant Node Item Attributes are displayed in the Node Items Panel.

4. Choosing  resets the search criteria.
5. Select the Node Item Attribute to be deleted. Choose .

## 4.11 Defining Move Request Parameters

Use Move Request for:

- [Defining Move Request Transaction Repository](#)
- [Defining Purge Criteria for Move Request](#)
- [Defining Move Request Cancellation Reasons](#)

### 4.11.1 Defining Move Request Transaction Repository

A repository is a logical collection of entities that define the business process workflow. Transaction Repository includes the following entities:

- Transactions
- Conditions
- Actions
- Services

Yantra 7x provides a base repository for each of the system defined process types. Some of the entities within a repository are copied when creating a new document type. For more information about creating a new document type, see the *Yantra 7x Platform Configuration Guide*.

For more information about defining process type details, see *Yantra 7x Platform Configuration Guide*.


#### 4.11.1.1 Transactions

Every process type has a set of base transactions defined for it. A transaction is a logical unit of work that is necessary for performing activity within Yantra 7x. Base transactions are predefined transactions that contain information about how the transaction behaves, such as how many copies of a transaction can be kept in a process type and whether or not it can have configurable base pick and drop statuses. Base transactions can be used to create new transactions. These transactions can be changed within the limits defined in the base transaction.

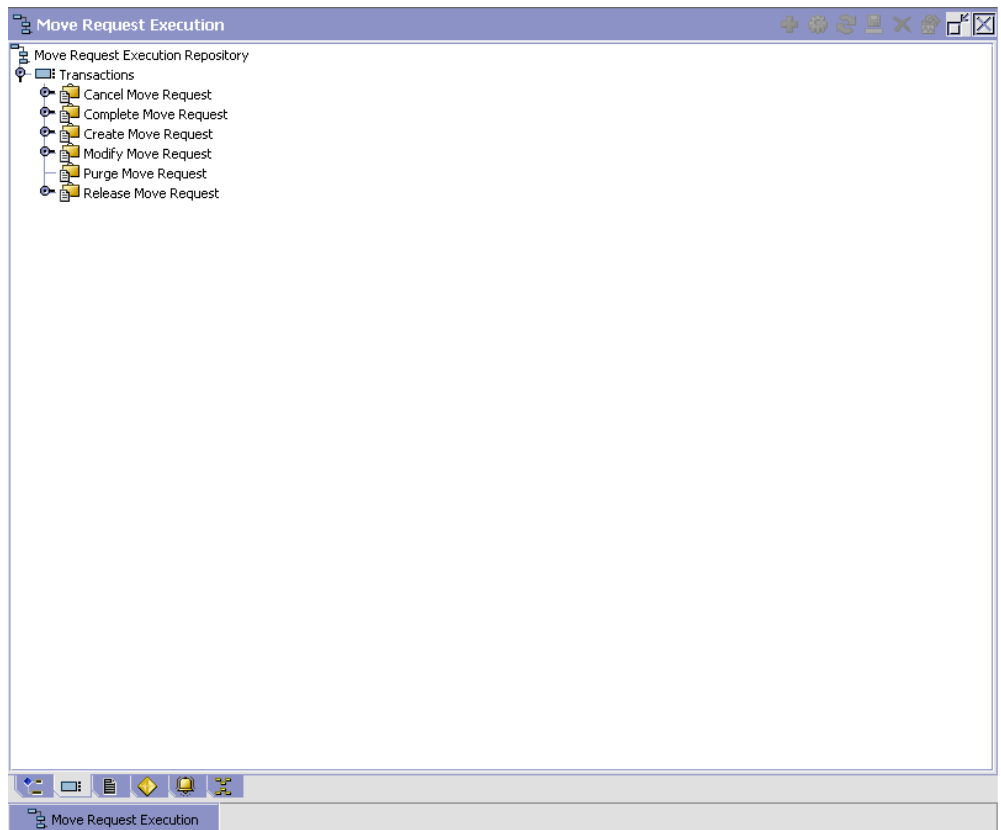


For more information about Transactions, see *Yantra 7x Platform Configuration Guide*.

To view the transaction repository details for move request:

1. From the tree in the application rules side panel, choose Inventory > Move Request > Transaction Repository. The Move Request Execution window is displayed.
2. In the Move Request Execution window, choose .
3. The Transactions tab window is displayed.

For more information about creating and modifying Transactions, see *Yantra 7x Platform Configuration Guide*.



**Table 4–24 Move Request Execution - Transactions Tab Window**


Field	Description
Cancel Move Request	This transaction represents the cancellation of a move request.
Complete Move Request	This transaction represents the completion of a move request.
Create Move Request	This transaction represents the creation of a move request.
Modify Move Request	This transaction represents the modification of a move request.
Purge Move Request	This transaction represents a move request that may now be purged.
Release Move Request	This transaction represents the release of a move request.

### 4.11.1.2 Conditions

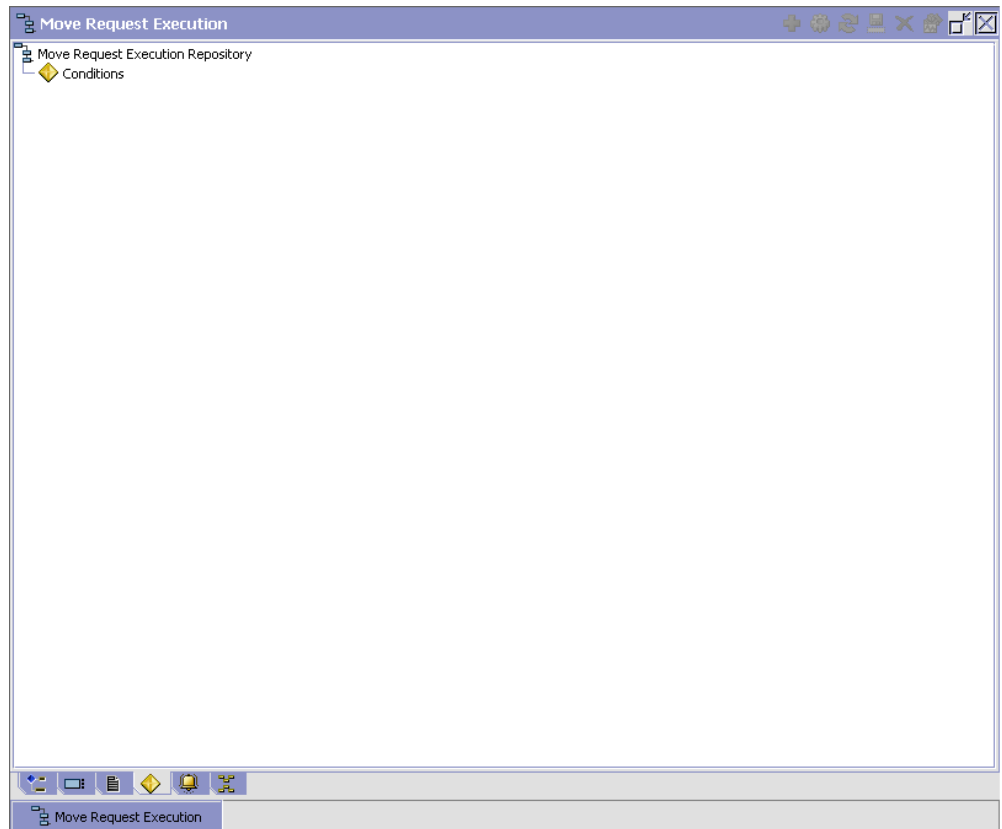
A **condition** matches document type attributes against decision points and routes the documents to different paths based on the specified attribute and value combinations. The document type attributes against which conditions can be created are predefined in Yantra 7x. You can use these attributes in any combination or you can create conditions that execute the appropriate application logic for specific circumstances.

For more information about Conditions, see *Yantra 7x Platform Configuration Guide*.

To view the condition repository details for move request:

1. From the tree in the application rules side panel, choose Inventory > Move Request > Transaction Repository. The Move Request Execution window is displayed.
2. In the Move Request Execution window, choose .
3. The Conditions tab window is displayed.

For more information about creating and modifying Conditions, see *Yantra 7x Platform Configuration Guide*.



Yantra 7x WMS default transaction repository does not have any conditions specified.


#### 4.11.1.3 Actions

An **action** is a process or program that is triggered by an event. These processes and programs send user alert notifications and automatically resolve issues.

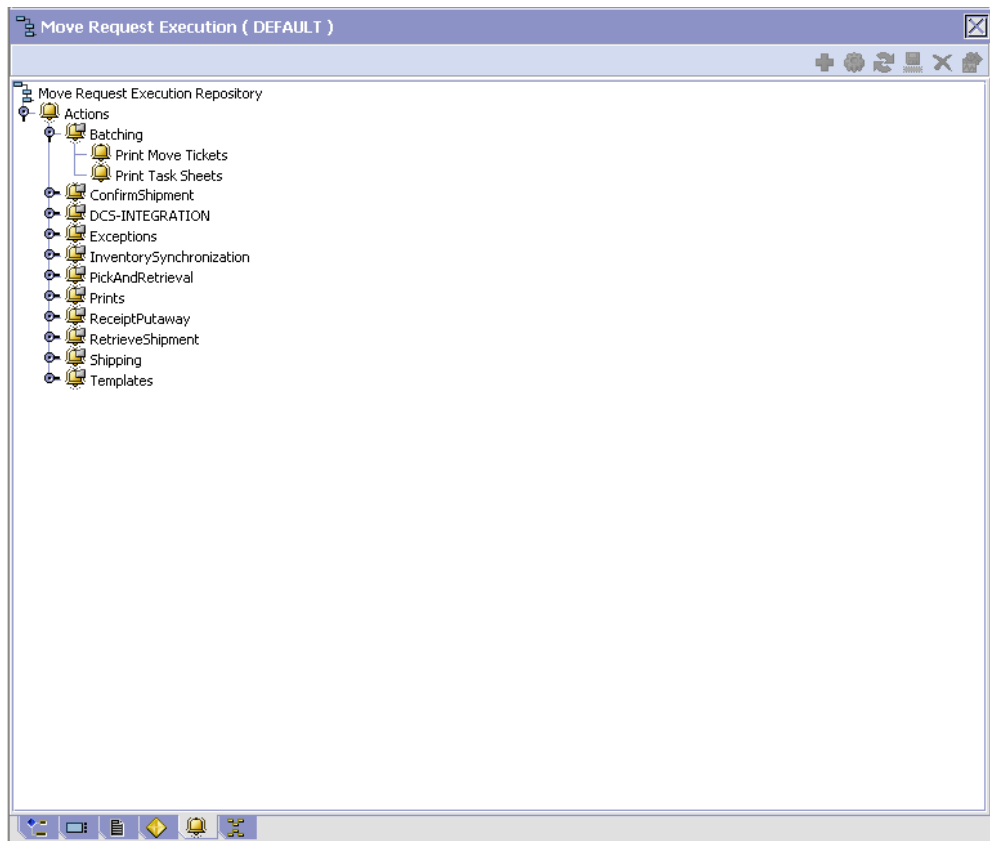
For example, when a variance task is created (the event), you can set an action to send the enterprise user an e-mail.

For more information about Actions, see *Yantra 7x Platform Configuration Guide*.

To view the action repository details for move request:

1. From the tree in the application rules side panel, choose Inventory > Move Request > Transaction Repository. The Move Request Execution window is displayed.
2. In the Move Request Execution window, choose .
3. The Actions tab window is displayed.

For more information about creating and modifying Actions, see *Yantra 7x Platform Configuration Guide*.



**Table 4–25 Move Request Execution - Actions Tab Window**

Field	Description
Batching	<p>Default settings are provided for:</p> <p><b>Print Move Tickets</b> – Invokes the batch printing service for printing the move tickets.</p> <p><b>Print Task Sheets</b> – Invokes the batch print service for printing the task sheets.</p>
ConfirmShipment	<p>Default settings are provided for:</p> <p><b>ConfirmShipment</b> – Invokes the confirmShipment flow to confirm the shipment.</p>
DCS-Integration	<p>Default settings are provided for:</p> <p><b>InventoryDownload</b> – Invokes the YantraWMSInventoryDownloadService service to download the inventory information from Yantra 7x to Yantra DCS.</p> <p><b>PODownload</b> – Invokes the YantraWMSPODownloadService service to download the Purchase Order information from Yantra 7x to Yantra DCS.</p>
Exceptions	<p>Default settings are provided for:</p> <p><b>ShortagesDetected</b> – Invokes the LogWavePlaFailure exception service when shortage of inventory occurs during wave release.</p>
InventorySynchronization	<p>Default settings are provided for:</p> <p><b>CollectInventoryMismatch</b> – This service collects the inventory mismatch information between an external system and Yantra 7x. This is typically caused when some inventory updates at a node or a warehouse are not reported to Yantra 7x.</p>
PickAndRetrieval	<p>Default settings are provided for:</p> <p><b>ConfirmEmptyLocationAfterPick</b> – Invokes the GenerateCountRequest flow which creates a count request.</p>

*Table 4–25 Move Request Execution - Actions Tab Window*

Field	Description
Prints	<p>Default settings are provided for:</p> <p><b>PickList Print</b> – Invokes the print service for printing the Pick List.</p> <p><b>LTL Manifest</b> – Invokes the print service for printing the Less-than Truck Load Manifest.</p> <p><b>Print Load BOL</b> – Invokes the print service for printing the Load Bill of Lading.</p> <p><b>Print PackList</b> – Invokes the print service for printing the Pack List.</p> <p><b>Print Post Pick Container Labels</b> – Invokes the print service for printing UCC-128 container labels for containers, when system defined packing process is used.</p> <p><b>Print Shipment BOL</b> – Invokes the print service for printing the Shipment Bill of Lading.</p> <p><b>Print Shipping Label</b> – Invokes the print service for printing the UCC-128 container labels.</p> <p><b>Print Wave</b> – Invokes the Print service for printing a Wave.</p>
ReceiptPutaway	<b>Putaway products on receipt closure</b> – Indicates the default action provided to automatically initiate putaway of purchase order receipts.
RetrieveShipment	<b>Retrieve Requested Serial</b> – This service invokes the retrieveShipment API to retrieve the requested serials to the specified location.

**Table 4–25 Move Request Execution - Actions Tab Window**


Field	Description
Shipping	<p>Default settings are provided for:</p> <p><b>Load Left Origin</b> – Invokes the doLoadLeftOriginUpdates service to mark that the load has left the origin.</p> <p><b>Stop Shipping</b> – Invokes the RaiseStopShippingAlert service to raise an alert to stop the processing of the shipment.</p>
Templates	<p>Default settings are provided for:</p> <p><b>Log Exception</b> – Logs the reasons due to which a count request could not be created for a Count Program.</p> <p><b>Publish Data</b> – Sends data to external queue or internal tables.</p> <p><b>Raise Exception</b> – Raises an alert using Yantra 7x Event Management from the published information.</p> <p><b>Send Email</b> – Raises an email action to create an email in the template format from the published information.</p> <p><b>Send Email-HTML format</b> – Raises an email action to create an email in HTML format from the published information.</p>

#### 4.11.1.4 Service Definitions

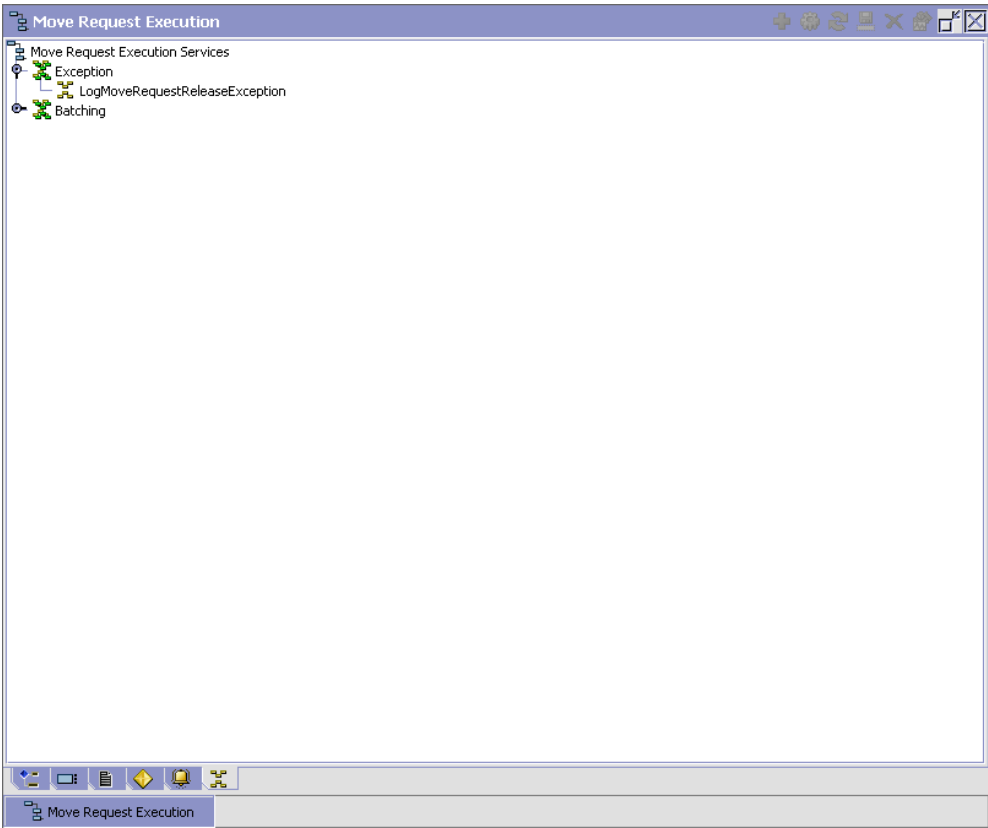
Service definitions are a representation of the logic that regulates document workflow services. The Service Builder is a graphical interface that enables you to create a graphical representation of these *services*.

For more information about Service Definitions, see *Yantra 7x Platform Configuration Guide*.

To view the service definition repository details for move request:

1. From the tree in the application rules side panel, choose Inventory > Move Request > Transaction Repository. The Move Request Execution window is displayed.
2. In the Move Request Execution window, choose .
3. The Service Definitions tab window is displayed.

For more information about creating and modifying Service Definitions, see *Yantra 7x Platform Configuration Guide*.



**Table 4–26** *Move Request Execution - Service Definitions Tab Window*

Field	Description
<b>Exception</b>	
LogMoveRequestReleaseException	This service creates an exception when no request was created during a move request release.
<b>Batching</b>	
PrintMoveTickets	This service prints the move request tasks belonging to the batch.



## 4.11.2 Defining Purge Criteria for Move Request

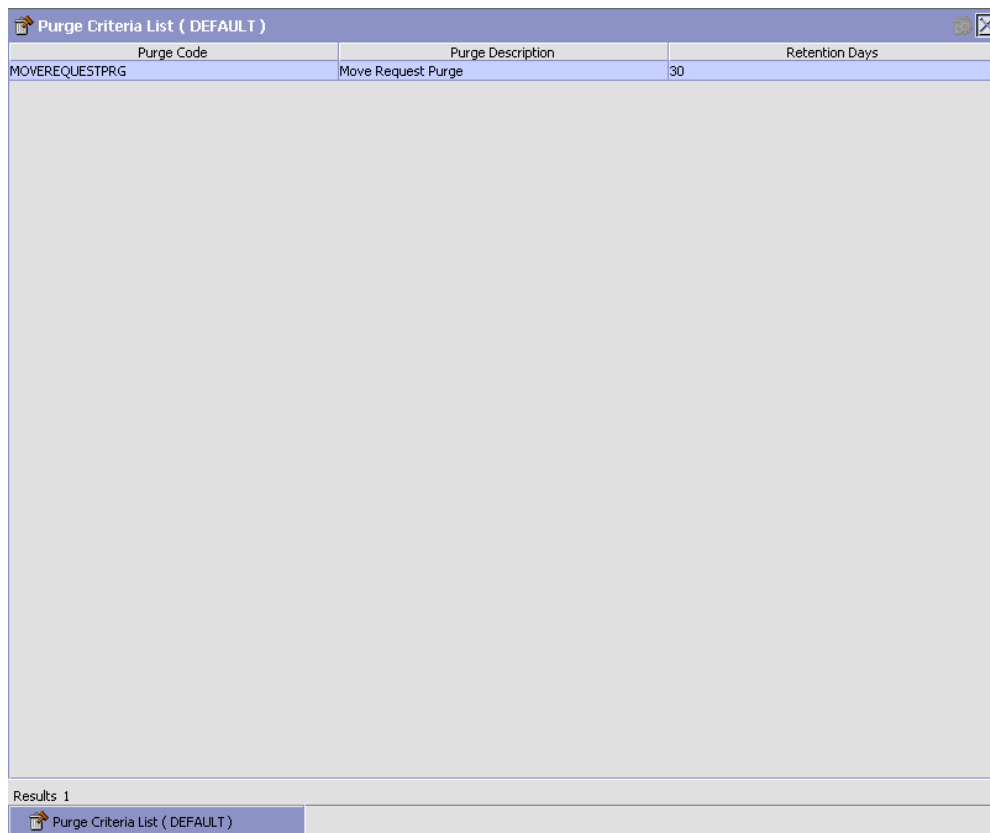
Transactional data collected by Yantra 7x WMS during execution are periodically removed from the 'live' transactional tables. It is common to retain order related information for extended periods of time. There are history tables provided for relevant transactional tables to move data from the day-to-day 'live' tables to a historical table.

Purge is the process by which old data is removed from the system database. A purge minimizes the number of unused database records to increase search efficiency and reduces the size of the required physical disk.

### 4.11.2.1 Setting Up Purge Criteria

To set up purge criteria:



1. From the tree in the application rules side panel, choose Inventory > Move Request > Purge Criteria. The Purge Criteria List window is displayed.



Purge Code	Purge Description	Retention Days
MOVEREQUESTPRG	Move Request Purge	30

Results 1

Purge Criteria List ( DEFAULT )

2. In the Purge Criteria List window, choose . The Purge Criteria Details pop-up window appears.
3. Enter information in the applicable fields. Refer [Table 4–27](#) for field value descriptions.
4. Choose .

**Purge Criteria Details**

Purge Code:  Description:

Rollback Segment:  Retention Days:

☐ Write To Log File Log File Name:

**Table 4–27 Purge Criteria Details Pop-up Window**

Field	Description
Purge Code	Identifies a purge program. This is a system defined code.
Description	Description of the purge.
Rollback Segment	<p>Defines the rollback segment that should be explicitly used for the purge transaction qualified by the purge code.</p> <p>This is useful when there are huge logical data sets that have to be purged. This is optional and used for order related purges.</p>
Retention Days	Enter the number of days of data to be retained in the database (going backwards from the time the program runs). Make sure that your table size takes into account the number of retention days entered here.
Write To Log File	Check this box if you want purged data written to a log. The log can be backed up and used as a journal at a later date.
Log File Name	<p>Enter a log file name. This is applicable only if 'Write To Log File' is checked. This file consists records of the specific table that is purged.</p> <p>The log file is created in the directory specified in the <code>yfs.purge.path</code> of <code>yfs.properties</code>. If a variable is introduced, then <code>yfs.purge.path</code> is ignored. For more information on using variables for the log file directory refer to <i>Yantra 7x Customization Guide</i>.</p> <p>For information about filename limitations related to internationalization, see the <i>Yantra 7x Localization Guide</i>.</p>

### 4.11.3 Defining Move Request Cancellation Reasons

A *Move Request Cancellation Reason* defines the reason code to associate to the cancellation of requests. Reason codes are specific to a warehouse and its processes.

Use Move Request Cancellation Reasons for:

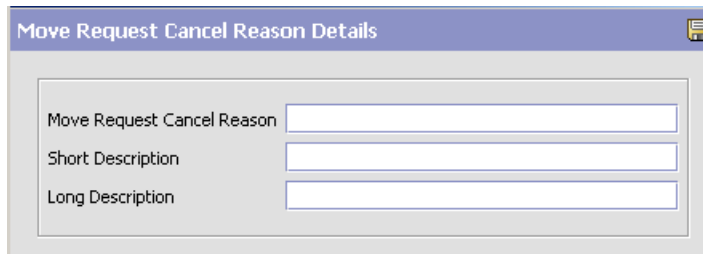
- [Creating a Move Request Cancellation Reason](#)
- [Creating a New Move Request Cancellation Reason from an Existing Move Request Cancellation Reason](#)
- [Modifying a Move Request Cancellation Reason](#)
- [Deleting a Move Request Cancellation Reason](#)

#### 4.11.3.1 Creating a Move Request Cancellation Reason

To create a move request cancellation reason:

1. From the tree in the application rules side panel, choose Inventory > Move Request > Move Request Cancellation Reasons.
2. The Move Request Cancellation Reason window is displayed.







The screenshot shows a software window titled "Move Request Cancel Reason Details". It contains three text input fields stacked vertically, each with a label to its left: "Move Request Cancel Reason", "Short Description", and "Long Description". A small save icon is visible in the top right corner of the window's title bar.

**Table 4–28** *Move Request Cancel Reason Details Pop-up Window*

Field	Description
Move Request Cancel Reason	Enter a name for the move request cancellation reason.
Short Description	Enter a short description for the move request cancellation reason.
Long Description	Enter a long description for the move request cancellation reason.

### 4.11.3.2 Creating a New Move Request Cancellation Reason from an Existing Move Request Cancellation Reason



To create a new move request cancellation reason from an existing move request cancellation reason:

1. From the tree in the application rules side panel, choose Inventory > Move Request > Move Request Cancellation Reasons.
2. The Move Request Cancellation Reason window is displayed with the list of Move Request Cancellation Reasons.
3. Select the Move Request Cancellation Reason to be copied.
4. Choose . The Move Request Cancel Reason Details pop-up window appears.
5. Enter information in the applicable fields. Refer [Table 4–28](#) for field value descriptions.
6. Choose .

### 4.11.3.3 Modifying a Move Request Cancellation Reason


Once a Move Request Cancellation Reason has been created, it can be modified.

To modify a move request cancellation reason:

1. From the tree in the application rules side panel, choose Inventory > Move Request > Move Request Cancellation Reasons.
2. The Move Request Cancellation Reason window is displayed with the list of Move Request Cancellation Reasons.
3. Select the Move Request Cancellation Reason to be modified.
4. Choose . The Move Request Cancel Reason Details pop-up window appears.
5. Enter information in the applicable fields. Refer [Table 4–28](#) for field value descriptions.
6. Choose .

### 4.11.3.4 Deleting a Move Request Cancellation Reason

To delete a move request cancellation reason:

1. From the tree in the application rules side panel, choose Inventory > Move Request > Move Request Cancellation Reasons.
2. The Move Request Cancellation Reason window is displayed with the list of Move Request Cancellation Reasons.
3. Select the Move Request Cancellation Reason to be deleted.
4. Choose .

## 4.12 Defining Count

Yantra 7x WMS allows count requests to be initiated through console on an ad hoc basis. System events like exception being recorded during putaway, retrieval or pick, or location quantity dropping below minimum levels or to zero can be used to initiate a count request. A request also includes date and time parameters indicating the start and end time expected for the task.

For example, a user may request a count for a zone that has slow moving items to start the next day by assigning a low priority.

A count request is also created through Yantra 7x Event Management and inventory monitors, when inventory at a location reaches zero quantity or when minimum or maximum inventory levels are breached.


Use Count set-up to define:

- [Defining Variance Hold Setup](#)
- [Defining Request Type](#)
- [Defining Count Request Cancellation Reasons](#)
- [Defining Count Program](#)
- [Defining Count Modification Rules](#)
- [Defining Count Process Type Details](#)
- [Defining Count Process Model](#)
- [Defining Count Strategy](#)
- [Defining Purge Criteria](#)
- [Defining Corporate Count Request Purge Criteria](#)




### 4.12.1 Defining Variance Hold Setup

During count, if any negative variances are encountered, the location in a zone can be put on variance hold. This automatically blocks the inventory at the location from being allocated or suggested for pick.

To set up a zone's put on variance hold:


1. From the tree in the application rules side panel, choose Inventory > Count > Variance Hold Setup. The Variance Hold Setup window is displayed with the list of Zones.
2. Select the appropriate action at the zone level. Refer [Table 4–29](#) for field value descriptions.
3. Choose .



 **Variance Hold Setup ( MA03 )**  

Zone	Description	Put On Variance Hold
DOCK-ZONE	Dock Zone having floor locations	<input type="checkbox"/>
VAS-ZONE	VAS Zone	<input type="checkbox"/>
PACK-ZONE	Pack Zone having floor locations	<input type="checkbox"/>
ACTIVE-ZONE	Active Zone with case racks and pigeonholes	<input type="checkbox"/>
CASE-RACK-ZONE	Zone with case racks	<input type="checkbox"/>
INFINITE-ZONE	Zone having Infinite locations	<input type="checkbox"/>
VIRTUAL-ZONE	Zone with virtual locations	<input type="checkbox"/>
VIRTUAL-NoLPNTrack	Zone does not track LPN	<input type="checkbox"/>
VIRTUAL-NoTrack	Zone does not track inventory or LPN	<input type="checkbox"/>
VIRTUAL-NoPalletTrack	Zone does not track Pallet	<input type="checkbox"/>
UNTRACK-LPN-ZONE	Zone doesn't track LPNs	<input type="checkbox"/>

Results 13 Of 13

 Variance Hold Setup ( MA03 )

**Table 4–29 Variance Hold Setup Window**

Field	Description
Zone	Indicates the list of existing zones for the node. This is populated automatically by the system, and cannot be modified.

**Table 4–29 Variance Hold Setup Window**

Field	Description
Description	Indicates the zone description. This is populated automatically by the system, and cannot be modified.
Put on Variance Hold	Select if you want the zone to be put on variance hold. This configures the freeze on variance feature for locations belonging to a zone. Only locations belonging to a zone with this flag checked will be put on variance hold if negative variance is found during a Count operation.

## 4.12.2 Defining Request Type

You can define Request Types to be used for a count request. Request Type indicates the type of count requested.

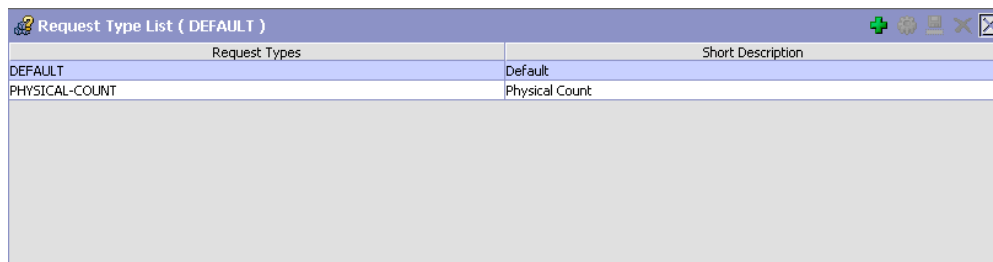
Use Request Types for:

- [Creating a Request Type](#)
- [Creating a New Request Type From an Existing Request Type](#)
- [Modifying a Request Type](#)
- [Deleting a Request Type](#)
- [Setting a Request Type for Create Count Request](#)



### 4.12.2.1 Creating a Request Type

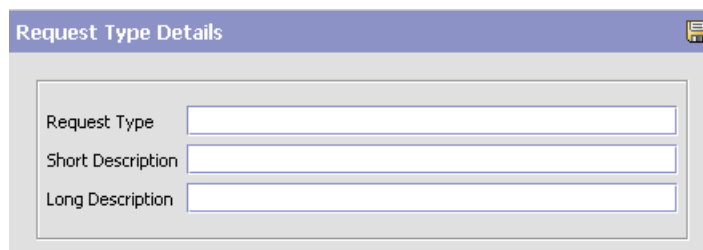
To create a request type:

1. From the tree in the application rules side panel, choose Inventory > Count > Request Types. The Request Type List window is displayed.



Request Types	Short Description
DEFAULT	Default
PHYSICAL-COUNT	Physical Count

- In the Request Type List window, choose . The Request Type Details pop-up window appears.
- Enter information in the applicable fields. Refer [Table 4–30](#) for field value descriptions.
- Choose .





Request Type Details	
Request Type	<input type="text"/>
Short Description	<input type="text"/>
Long Description	<input type="text"/>

**Table 4–30 Request Type Details Pop-up Window**

Field	Description
Request Type	Enter the request type.
Short Description	Enter a brief description for the request type.
Long Description	Enter a more detailed description for the request type.

#### 4.12.2.2 Creating a New Request Type From an Existing Request Type



To create a new request type from an existing request type:

1. From the tree in the application rules side panel, choose Inventory > Count > Request Types. The Request Type List window is displayed with the list of request types.
2. Choose the Request Type to be copied from. Choose . The Request Type Details pop-up window appears.
3. Enter information in the applicable fields. Refer [Table 4–30](#) for field value descriptions.
4. Choose .

### 4.12.2.3 Modifying a Request Type


Once a Request Type has been created, it may be modified.

To modify a request type:

1. From the tree in the application rules side panel, choose Inventory > Count > Request Types. The Request Type List window is displayed with the list of Request Types.
2. Choose the Request Type to be modified. Choose . The Request Type Details pop-up window appears.
3. Enter information in the applicable fields. Refer [Table 4–30](#) for field value descriptions.
4. Choose .

### 4.12.2.4 Deleting a Request Type

To delete a request type:

1. From the tree in the application rules side panel, choose Inventory > Count > Request Types. The Request Type List window is displayed with the list of Request Types.
2. Choose the Request Type to be deleted.
3. Choose .

### 4.12.2.5 Setting a Request Type for Create Count Request

You can set the request type for create count request as cycle count or physical count or manual count. To set the request type, you must enter the resource details for create count request.

- To set cycle count as the default request type:  
In the Application Consoles Detail View panel, in the Java Server Page field, enter `/extn/wms/count/detail/count_request_detail_createanchor.jsp?requestType=CYCLE-COUNT`.
- To set physical count as the default request type:  
In the Application Consoles Detail View panel, in the Java Server Page field, enter `/extn/wms/count/detail/count_request_detail_createanchor.jsp?requestType=PHYSICAL-COUNT`.
- To set manual count as the default request type:  
In the Application Consoles Detail View panel, in the Java Server Page field, enter `/extn/wms/count/detail/count_request_detail_createanchor.jsp?requestType=MANUAL-COUNT`.

For more information about defining resources, see the *Yantra 7x Platform Configuration Guide*.

### 4.12.3 Defining Count Request Cancellation Reasons

A reason code is associated with cancellation of count requests.

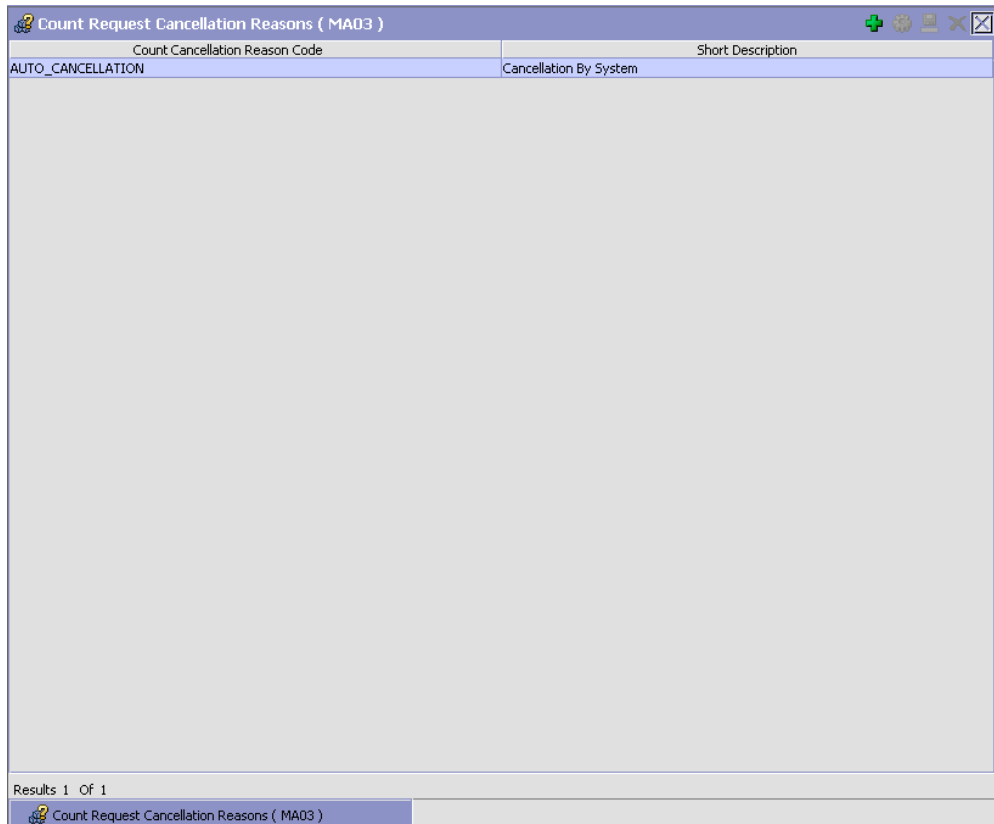
Use Count Request Cancellation Reasons for:

- [Creating a Count Request Cancellation Reason](#)
- [Creating a New Count Request Cancellation Reason from an Existing Count Request Cancellation Reason](#)
- [Modifying a Count Request Cancellation Reason](#)
- [Deleting a Count Request Cancellation Reason](#)

#### 4.12.3.1 Creating a Count Request Cancellation Reason

To create a count request cancellation reason:



1. From the tree in the application rules side panel, choose Inventory > Count > Count Request Cancellation Reasons. The Count Request Cancellation Reasons window is displayed.



Count Request Cancellation Reasons ( MA03 )				
Count Cancellation Reason Code	Short Description			
AUTO_CANCELLATION	Cancellation By System			

Results 1 Of 1

Count Request Cancellation Reasons ( MA03 )

2. In the Count Request Cancellation Reasons window, choose .
3. The Count Cancellation Reason Details pop-up window appears.
4. Enter information in the applicable fields. Refer [Table 4–31](#) for field value descriptions.
5. Choose .


**Table 4–31** *Count Cancellation Reason Details Pop-up Window*


Field	Description
Count Cancellation Reason	Enter a code for the count request cancellation reason.
Short Description	Enter a short description for the count request cancellation reason.
Long Description	Enter a long description for the count request cancellation reason.

**Note:** To cancel a work order that is released, and for which a move request exists, Yantra 7x requires a move request cancellation reason called 'SYSTEM'.

#### 4.12.3.2 Creating a New Count Request Cancellation Reason from an Existing Count Request Cancellation Reason

To create a new Count Request Cancellation Reason from an existing Count Request Cancellation Reason:



1. From the tree in the application rules side panel, choose Inventory > Count > Count Request Cancellation Reasons.
2. The Count Request Cancellation Reasons window is displayed with the list of Count Cancellation Reason Codes.
3. Choose the Count Request Cancellation Reason to be copied.
4. Choose . The Count Cancellation Reason Details pop-up window appears.

5. Enter information in the applicable fields. Refer [Table 4–31](#) for field value descriptions.
6. Choose .

### 4.12.3.3 Modifying a Count Request Cancellation Reason


Once a Count Request Cancellation Reason has been created, it can be modified.

To modify a Count Request Cancellation Reason:

1. From the tree in the application rules side panel, choose Inventory > Count > Count Request Cancellation Reasons.
2. The Count Request Cancellation Reasons window is displayed with the list of Count Request Cancellation Reasons.
3. Choose the Count Request Cancellation Reason to be modified.
4. Choose . The Count Cancellation Reason Details pop-up window appears.
5. Enter information in the applicable fields. Refer [Table 4–31](#) for field value descriptions.
6. Choose .

### 4.12.3.4 Deleting a Count Request Cancellation Reason

To delete a Count Request Cancellation Reason:

1. From the tree in the application rules side panel, choose Inventory > Count > Count Request Cancellation Reasons.
2. The Count Request Cancellation Reasons window is displayed with the list of Count Request Cancellation Reasons.
3. Choose the Count Request Cancellation Reason to be deleted.
4. Choose .

## 4.12.4 Defining Count Program

Yantra 7x WMS is equipped to automatically generate a count request using the Automatic Count Generation functionality at the node level.



The Automatic Count Generation is set up through Count Programs, which define the valid date range of the program, the applicable zones in the warehouse, the products that are to be counted, and the periodicity of the count requests.

The Count Program is associated with a count calendar that would provide information about the list of working days, when the node would perform count for this program.

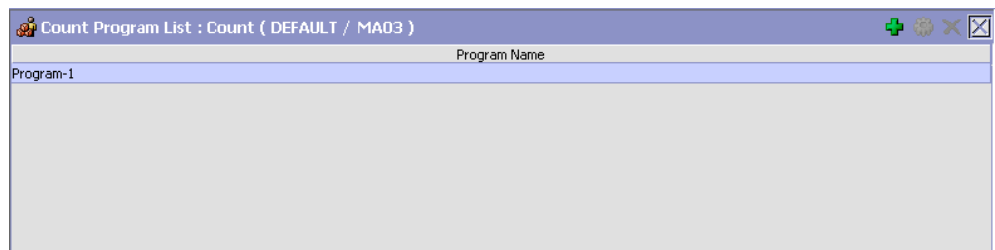
Use Count Program for:


- [Creating a Count Program](#)
- [Modifying a Count Program](#)
- [Deleting a Count Program](#)

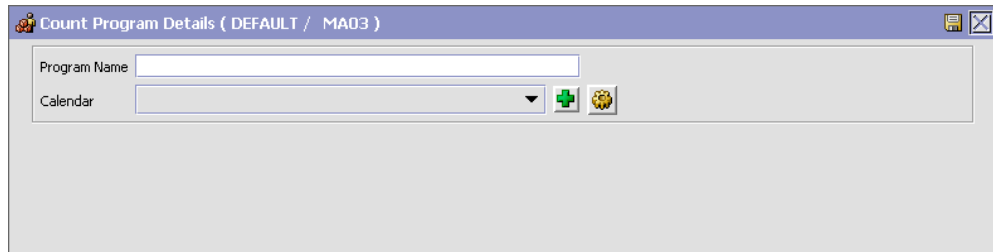
#### 4.12.4.1 Creating a Count Program

To create a count program:



1. From the tree in the application rules side panel, choose Inventory > Count > Count Execution > Count Program. The Count Program List window is displayed.

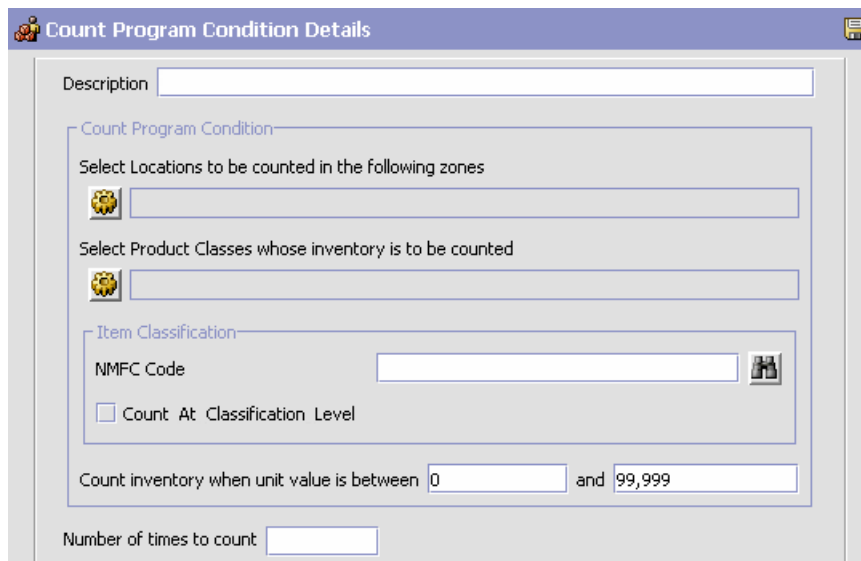


2. In the Count Program List window, choose . The Count Program Details window is displayed.





The screenshot shows a window titled "Count Program Details ( DEFAULT / MA03 )". It contains two input fields: "Program Name" and "Calendar". The "Calendar" field is a dropdown menu. To the right of the "Calendar" field are two icons: a green plus sign and a yellow gear icon.

3. Enter a valid Program Name for the Program being created.
4. Choose the relevant Calendar to be used for the Program, from the Calendar drop-down list. The calendar of the node as well as the calendars of the primary enterprise of the node display in this list. For more information about creating a new calendar, see *Yantra 7x Platform Configuration Guide*.
5. Choose . The Count Program Conditions panel is now displayed in the Count Program Details window.
6. In the Count Program Conditions panel, choose . The Count Program Condition Details Pop-up appears.





The screenshot shows a window titled "Count Program Condition Details". It contains several input fields and sections:

- Description:** A text input field.
- Count Program Condition:** A section containing:
  - Select Locations to be counted in the following zones:** A text input field with a yellow gear icon to its left.
  - Select Product Classes whose inventory is to be counted:** A text input field with a yellow gear icon to its left.
- Item Classification:** A section containing:
  - NMFC Code:** A text input field with a small icon to its right.
  - ☐ Count At Classification Level
- Count inventory when unit value is between:** Two text input fields, one containing "0" and the other containing "99,999", separated by the word "and".
- Number of times to count:** A text input field.

7. Enter information in the applicable fields. Refer [Table 4–32](#) for field value descriptions.
8. Choose . The pop-up window is closed, and you are returned to the Count Program Details window.
9. After setting up all the relevant Count Program Conditions, choose  in the Count Program Details window.

**Table 4–32 Count Program Condition Details Pop-up Window**

Field	Description
Description	Enter a description for the count program condition.
<b>Count Program Condition</b>	
Select locations to be counted in the following zones	Choose  . In the List of Values pop-up, choose the zones that are to be counted.
Select Product Classes whose inventory is to be counted	Choose  . In the List of Values pop-up, choose the product classes that are to be counted.
Item Classification	Displays the item classifications that are available to be counted.
Count at Classification Level	Select if the counting is to be done at the item classification level.
Count inventory when unit value is between	Enter the minimum unit value to be counted. This defaults to 0 if no value is provided.
and	Enter the maximum unit value to be counted. This defaults to 99,999 if no value is provided.
Number of times to count	Enter the number of times to count.

### Example for Count Program

Consider that a count program has to be set up to count a certain item classification four times during a year, where:

- The count period dictated by the auditing organization is a year,
- The number of working days is 200 days, and
- The specific item classification is ProductLine being 'HighValue'.

In this instance, the steps to configure the count program is as follows:



- Set up the Count Program with calendar that reflects the count period and the number of working days
- Specify number of times to count, zones and item classification where ProductLine='HighValue' in the count strategy.

It is recommended that the Count Program is scheduled for all working days.

The Count Program determines the number of count requests based on # of working days remaining in Program Calendar with the number of items that meet the criteria specified by the count strategy and the number of times to count the classification.


### 4.12.4.2 Modifying a Count Program

To modify a Count Program:

1. From the tree in the application rules side panel, choose Inventory > Count > Count Execution > Count Program. The Count Program List window is displayed with the list of existing programs.
2. Choose the Count Program that is to be modified. Choose .
3. The Count Program Details window is displayed. Modify the entries as necessary.
4. Choose .

### 4.12.4.3 Deleting a Count Program

To delete a count program:

1. From the tree in the application rules side panel, choose Inventory > Count > Count Execution > Count Program. The Count Program List window is displayed with the list of existing programs.
2. Choose the Count Program that is to be deleted.
3. Choose .

## 4.12.5 Defining Count Modification Rules

Yantra 7x WMS executes tasks based on a blind count methodology initially. This methodology does not show the user the current system

quantity. This methodology is the most accurate and exhaustive method to ensure that all users perform counts accurately.

These count tasks are executed through RF, which allows for online inventory updates and the ability to interleave count tasks during the process of a regular workday.

In some warehouses, inventory is tracked at a tag number or serial number level. The count at these granular levels is cumbersome and requires opening of packages. In such situations, Yantra 7x WMS allows for counting without specifying these granular attributes. However, variance resolution of these tasks has to be done at the granular level.

Yantra 7x supports modifications through the Yantra 7x Application Consoles and APIs. It is critical for you to decide which modifications are allowed for each modification type, modification level, and status combination.

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**Important:** Contemplate business and system integration implications before allowing a modification that is disallowed as part of the system defaults.

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

#### 4.12.5.1 Setting Up Count Modification Rules

To set up count modification rules:

1. From the tree in the application rules side panel, choose Inventory > Count > Count Execution > Count Modification Rules. The Modification Rules : Count Execution window is displayed.
2. In the Modification Rules : Count Execution window, select the Status of the Count Request whose Count Modification Rule is to be set. Refer [Table 4–33](#) for field value descriptions.
3. Choose  to allow count modification. Choose  to disallow count modification. Choose  to ignore count modification.

For more information about defining and changing modification rules, see *Yantra 7x Distributed Order Management Configuration Guide*.

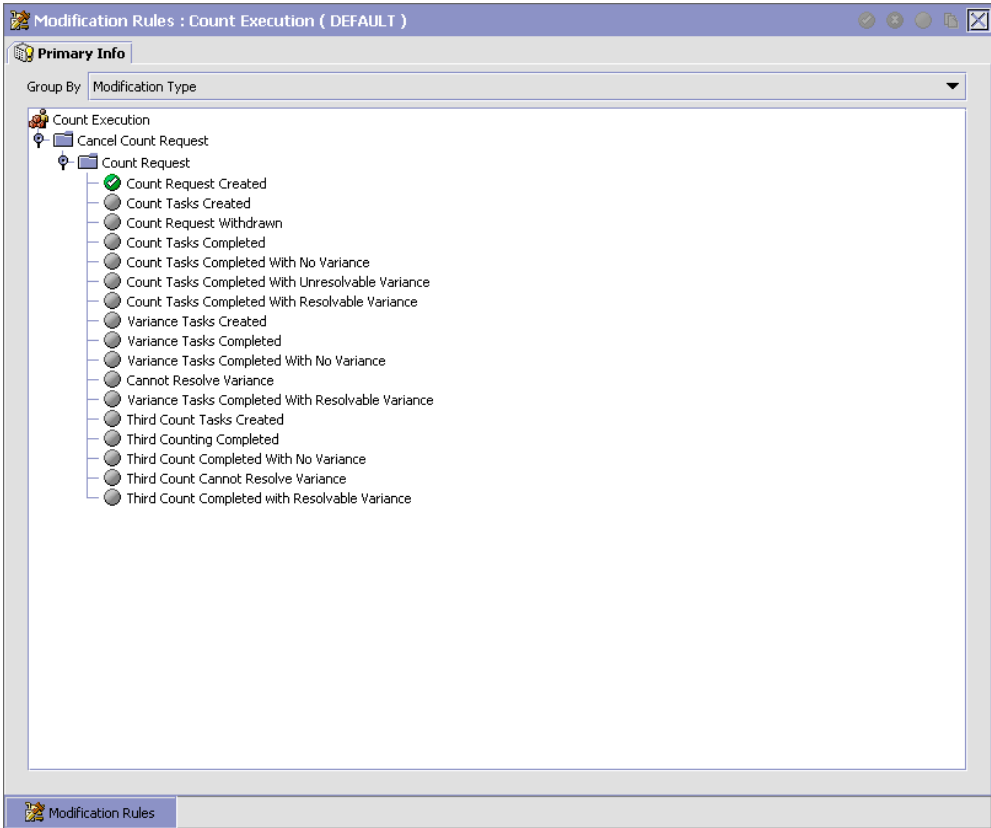


Table 4–33 Modification Rules : Count Execution Window

Field	Description
Primary Info	
Group by	View the Count Modification Rules grouped by Modification Type, Modification Level, or by Status.
Modification Type	<b>Count Modification Rules grouped by Modification Type. Statuses are displayed grouped by Modification Level for each Modification Type.</b>
Cancel Count Request	Allow, Disallow, or Ignore cancellation of count request appropriately.

**Table 4–33 Modification Rules : Count Execution Window**

Field	Description
Modification Level	<b>Count Modification Rules grouped by Modification Level. Statuses are displayed grouped by Modification Type for each Modification Level.</b>
Count Request	Allow or Disallow or Ignore modification types at the count request level appropriately.
Status	<b>Count Modification Rules grouped by Status. Modification Types are displayed grouped by Modification Level for each Status.</b>  For more information about group by status, see <a href="#">Section 4.12.7.6, "Statuses"</a> on page 243.

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

## 4.12.6 Defining Count Process Type Details

Count Process Type Details define parameters and templates that distinguish a process type.

A process type pipeline is a series of transactions and statuses that guide document types, such as Count, through a predefined process. A pipeline consists of the different statuses a document goes through during execution. You can also set up transactions consisting of events, actions, and conditions, as they pertain to the pipeline you are configuring.

### Repositories

A repository is a logical collection of entities that define the business process workflow.

The following entities are included in a repository:

- Pipelines
- Transactions
- Statuses
- Conditions
- Actions

- Services

Yantra 7x provides a base repository for each of the system defined process types. Some of the entities within a repository are copied when creating a new document type. For more information about creating a new document type, see the *Yantra 7x Platform Configuration Guide*.

For more information about defining process type details, see *Yantra 7x Platform Configuration Guide*.

### 4.12.6.1 Viewing Count Process Type Details

To view count process type details:

1. From the tree in the application rules side panel, choose Inventory > Count > Count Execution > Count Process Type Details. The Count Process Type Details : Count window is displayed.
2. Primary information of the Process Type is displayed in the applicable fields. Refer [Table 4–34](#) for field value descriptions.

For more information about defining the primary information for process type details, see *Yantra 7x Platform Configuration Guide*.



Process Type Details : Count ( DEFAULT )

**Primary Info**

Process Type: COUNT\_EXECUTION      Process Type Name: Count Execution

Description: Count Execution

Process Type Details : Count

**Table 4–34 Process Type Details: Count Window**

Field	Description
<b>Primary Info</b>	
Process Type	This is automatically populated by the system as "COUNT_EXECUTION".
Process Type Name	This indicates the name of the process type.
Description	This provides a brief description for the process type.

## 4.12.7 Defining Count Process Model

Process Modeling is the set up of business process workflow through a pipeline. A pipeline is a series of transactions and statuses that guide document types, such as Count, through a predefined process. A pipeline consists of different statuses a document goes through during count, variance processes. You can also setup transactions consisting of events, actions and conditions, as they pertain to the pipeline you are configuring.

### 4.12.7.1 Pipeline Determination

**Pipeline determination** is used to set up conditions that affect which pipeline is used during the start of the business process workflow. For example, a 3PL organization with multiple enterprises, one of which requires all count tasks with variance to be counted once more before variance is resolved. This organization is uniquely identified to an individual pipeline.

For more information about Pipeline Determination, see *Yantra 7x Platform Configuration Guide*.

### 4.12.7.2 Hub Rule

When you expand the Pipeline Determination branch, the components displayed depends on what role you are logged in as. If you are logged in as a Hub role, the Hub Rule is displayed. If you are logged in as an Enterprise role, both the Hub Rule and all user created determination rules (For example, My Rule) components are displayed. Double-click on the applicable rule to display the pipeline determination rules.

**Note:** If you are logged in as an Enterprise role, the Hub Rule screen is grayed out and cannot be modified.

Drag conditions and pipelines into the work area to construct pipeline determination rules. A single pipeline or condition must be the root. Conditions cannot link back to an earlier component in the chain and a pipeline cannot be linked to twice.

#### 4.12.7.3 Condition Variables for Pipeline Determination

When using conditions for pipeline determination, the following condition variables can be used:

- Enterprise Code
- Request Type
- Count Program Name
- Node Key
- Zone ID
- Location Size Code
- Is LPN Level
- Is Case Level
- Is Pallet Level
- Is Item Level
- Is Resolvable
- Product Class
- Unit of Measure
- Item Classification 1
- Item Classification 2
- Item Classification 3
- Has Variance
- Has Absolute Variance
- Variance Quantity
- Absolute Variance Quantity
- Variance Value
- Absolute Variance Value
- Has Variance With Previous Count
- {Enter Your Own Attribute}

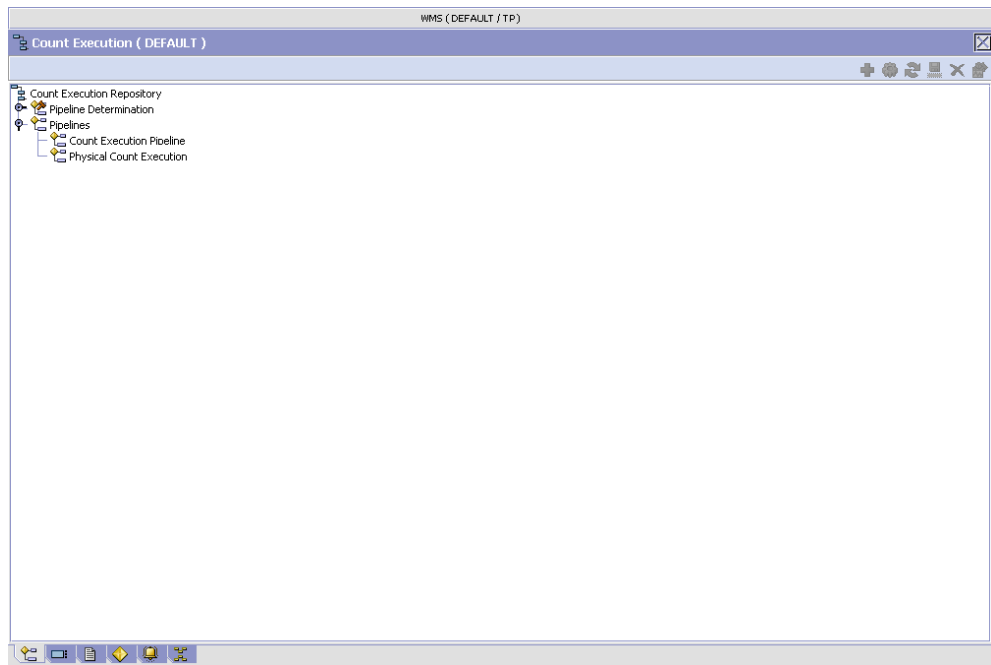
For more information about Pipeline Determination and Hub Rule, see *Yantra 7x Platform Configuration Guide*.

### 4.12.7.4 Pipelines

For more information about Pipelines, see *Yantra 7x Platform Configuration Guide*.

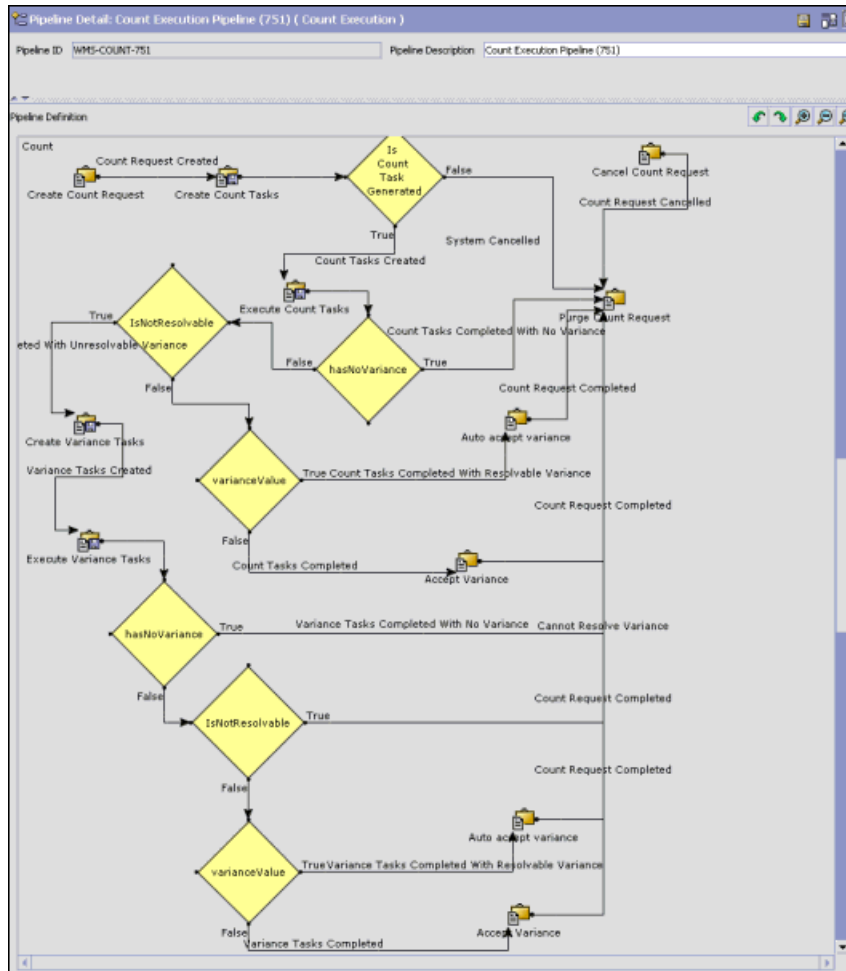
To view the count pipeline details:

1. From the tree in the application rules side panel, choose Inventory > Count > Count Execution > Count Process Model. The Count Execution window is displayed.



2. In the Count Execution window, choose Count Execution Repository > Pipelines > Count Execution Pipeline.
3. The Pipeline Detail: Count Execution Pipeline (Count Execution) window is displayed.

For more information about creating and modifying a pipeline, see the *Yantra 7x Platform Configuration Guide*.




#### 4.12.7.5 Transactions

Every process type has a set of base transactions defined for it. A transaction is a logical unit of work that is necessary for performing activity within Yantra 7x. Base transactions are predefined transactions that contain information about how the transaction behaves, such as how

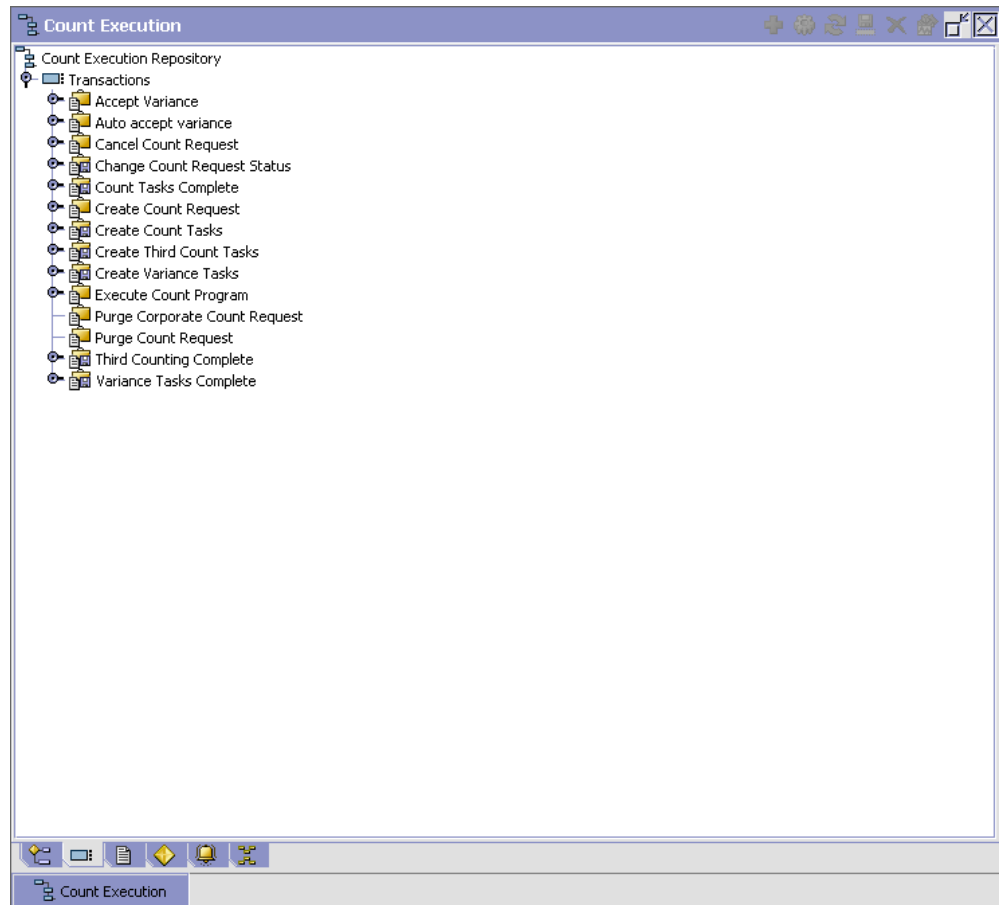
many copies of a transaction can be kept in a process type and whether or not it can have configurable base pick and drop statuses. Base transactions can be used to create new transactions. These transactions can be changed within the limits defined in the base transaction.

For more information about Transactions, see *Yantra 7x Platform Configuration Guide*.

To view the transaction details for a count pipeline:

1. From the tree in the application rules side panel, choose Inventory > Count > Count Execution > Count Process Model. The Count Execution window is displayed.
2. In the Count Execution window, choose .
3. The Transactions tab window is displayed.

For more information about creating and modifying Transactions, see *Yantra 7x Platform Configuration Guide*.



**Table 4–35 Count Execution Pipeline - Transactions Tab Window**

Field	Description
Accept Variance	This transaction represents the acceptance of the variance. Variance is accepted manually through the console.
Auto Accept Variance	This transaction represents the automatic acceptance of a variance based on attributes of the variance.  For example, a warehouse allows variances to be automatically resolved when the variance value is below specific value or when variance quantity is below specific quantity for an item classification.
Cancel Count Request	This transaction represents the cancellation of a count request.
Change Count Request Status	This transaction represents the change of the count request status. The change is done either through other transactions, through console or RF.
Count Tasks Complete	This transaction represents the completion of all count tasks for a count request.
Create Count Request	This transaction represents the creation of a count request.
Create Count Tasks	This transaction represents the creation of count tasks for a count request.
Create Third Count Tasks	This transaction represents the creation of third count tasks for a count request.
Create Variance Tasks	This transaction represents the creation of variance tasks after count has been completed at a location.
Execute Count Program	This transaction represents the execution of a count program.
Purge Corporate Count Request	This transaction represents the purging of one or more corporate count requests based on their status.  For more information about corporate count request purge criteria, see <a href="#">Section 4.12.10, "Defining Corporate Count Request Purge Criteria"</a> on page 262.
Purge Count Request	This transaction represents the purging of one or more count requests based on their status.  For more information about purge criteria, see <a href="#">Section 4.12.9, "Defining Purge Criteria"</a> on page 259.



**Table 4–35 Count Execution Pipeline - Transactions Tab Window**


Field	Description
Third Counting Complete	This transaction represents the completion of all third count tasks for a count request.
Variance Tasks Complete	This transaction represents the completion of all variance tasks for a count request.

#### 4.12.7.6 Statuses

**Statuses** are the actual states that a document moves through in the pipeline. A transaction can contain two types of statuses, a drop status and a pickup status. A document is moved into a **drop status** when the events and conditions of a transaction have been completed. A **pickup status** takes the document from the previous drop status and moves it through the next transaction. Created and Completed are examples of statuses.

For more information about Statuses, see *Yantra 7x Platform Configuration Guide*.

To view the status details of a count pipeline:

1. From the tree in the application rules side panel, choose Inventory > Count > Count Execution > Count Process Model. The Count Execution window is displayed.
2. In the Count Execution window, choose .
3. The Statuses tab window is displayed.

For more information about creating and modifying a Status, see *Yantra 7x Platform Configuration Guide*.

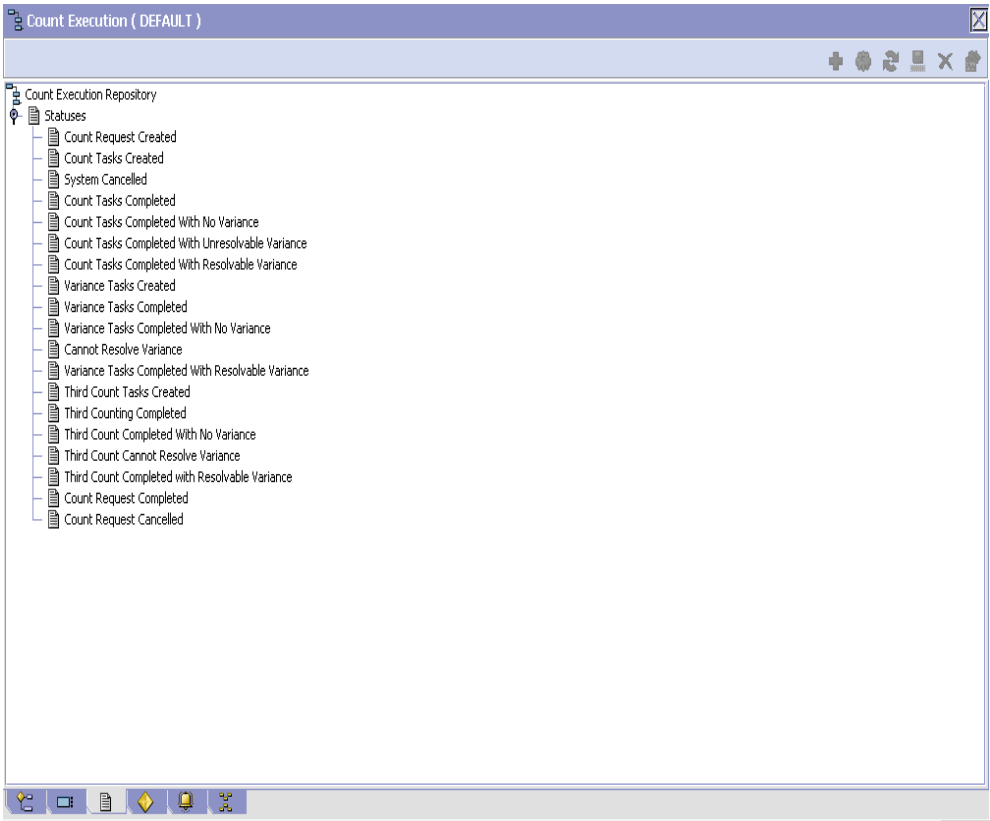


Table 4–36 Count Execution Pipeline - Statuses Tab Window

Field	Description
Count Request Created	This indicates that count request has been created. This corresponds to 'Create Count Request' transaction.
Count Tasks Created	This indicates that count tasks are created for the request. This corresponds to 'Create Count Tasks' transaction.

**Table 4–36 Count Execution Pipeline - Statuses Tab Window**

Field	Description
System Cancelled	This indicates that the count task generation has failed. This corresponds to 'Create Count Task' transaction.
Count Tasks Completed	This indicates that all count tasks for a count request are complete. This corresponds to 'Count Tasks Complete' transaction.
Count Tasks Completed With No Variance	This indicates that all count tasks for a count request are complete with no variance. This corresponds to 'Count Tasks Complete' transaction and 'HasNoVariance' condition.
Count Tasks Completed With Unresolvable Variance	This indicates that all count tasks for a count request are complete with unresolvable variance. This corresponds to 'Count Tasks Complete' transaction and 'IsNotResolvable' condition.
Count Tasks Completed With Resolvable Variance	This indicates that all count tasks for a count request are complete with resolvable variance. This corresponds to 'Count Tasks Complete' transaction and 'varianceValue' condition.
Variance Task Created	This indicates that variance tasks are created for the count request. This corresponds to 'Create Variance Tasks' transaction.
Variance Tasks Completed	This indicates that all variance tasks for a count request are complete. This corresponds to 'Variance Tasks Complete' transaction.
Variance Tasks Completed With No Variance	This indicates that all variance tasks for a count request are complete with no variance value. This corresponds to 'Variance Tasks Complete' transaction and 'HasNoVariance' condition.
Cannot Resolve Variance	This indicates that variance tasks are marked as not resolvable. This corresponds to 'IsNotResolvable' condition being True.

**Table 4–36 Count Execution Pipeline - Statuses Tab Window**

Field	Description
Variance Tasks Completed With Resolvable Variance	This indicates that all variance tasks for a count request are complete with resolvable variance. This corresponds to 'Variance Tasks Complete' transaction and 'varianceValue' condition.
Third Count Tasks Created	This indicates that third count tasks are created for the request. This corresponds to 'Create Third Count Tasks' transaction.
Third Counting Completed	This indicates that all third count tasks for a count request are complete. This corresponds to 'Third Counting Complete' transaction.
Third Counting Completed With No Variance	This indicates that all third count tasks for a count request are complete with no variance. This corresponds to 'Third Counting Complete' transaction and 'HasNoVariance' condition.
Third Count Cannot Resolve Variance	This indicates that all third count tasks for a count request are complete with unresolvable variance. This corresponds to 'Third Counting Complete' transaction and 'IsNotResolvable' condition.
Third Count Completed With Resolvable Variance	This indicates that all third count tasks for a count request are complete with resolvable variance. This corresponds to 'Third Counting Complete' transaction and 'varianceValue' condition.
Count Request Completed	This indicates that all count and variance tasks for the count request are complete. This corresponds to 'Accept Variance', 'Auto Accept Variance' transactions and 'HasNoVariance' condition.
Count Request Cancelled	This indicates that count request is cancelled. This corresponds to 'Cancel Count Request' transaction.


#### 4.12.7.7 Conditions

A **condition** matches document type attributes against decision points and routes the documents to different paths based on the specified

attribute and value combinations. The document type attributes against which conditions can be created are predefined in Yantra 7x. You can use these attributes in any combination or you can create conditions that execute the appropriate application logic for specific circumstances.

For more information about Conditions, see *Yantra 7x Platform Configuration Guide*.

To view the condition details of a count pipeline:

1. From the tree in the application rules side panel, choose Inventory > Count > Count Execution > Count Process Model. The Count Execution window is displayed.
2. In the Count Execution window, choose .
3. The Conditions tab window is displayed.

For more information about creating and modifying Conditions, see *Yantra 7x Platform Configuration Guide*.

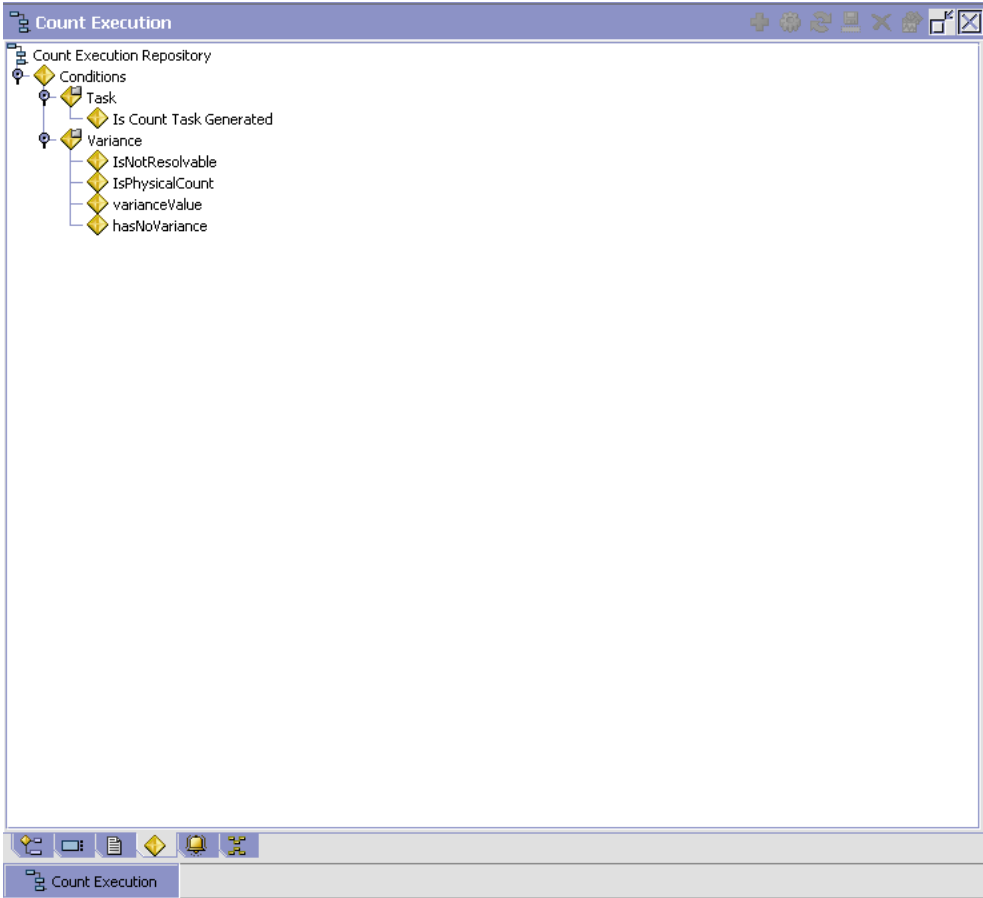


Table 4–37 Count Execution Pipeline - Conditions Tab Window

Field	Description
Task	
Is Count Task Generated	Condition that evaluates if the number of tasks for the count is greater than zero.
Variance	
IsNotResolvable	Condition that evaluates if the 'IsResolvable' field is 'N' for a count task.

**Table 4–37 Count Execution Pipeline - Conditions Tab Window**

Field	Description
IsPhysicalCount	Condition that evaluates if the Request Type is 'PHYSICAL-COUNT'.
VarianceValue	Condition that evaluates if the 'VarianceValue' field is less than 50 for the variance recorded.
HasNoVariance	Condition that evaluates if there is any variance.


#### 4.12.7.8 Actions

An **action** is a process or program that is triggered by an event. These processes and programs send user alert notifications and automatically resolve issues.

For example, when a variance task is created (the event), you can set an action to send the enterprise user an e-mail.

For more information about Actions, see *Yantra 7x Platform Configuration Guide*.

To view the action details of a count pipeline:

1. From the tree in the application rules side panel, choose Inventory > Count > Count Execution > Count Process Model. The Count Execution window is displayed.
2. In the Count Execution window, choose .
3. The Actions tab window is displayed.

For more information about creating and modifying Actions, see *Yantra 7x Platform Configuration Guide*.

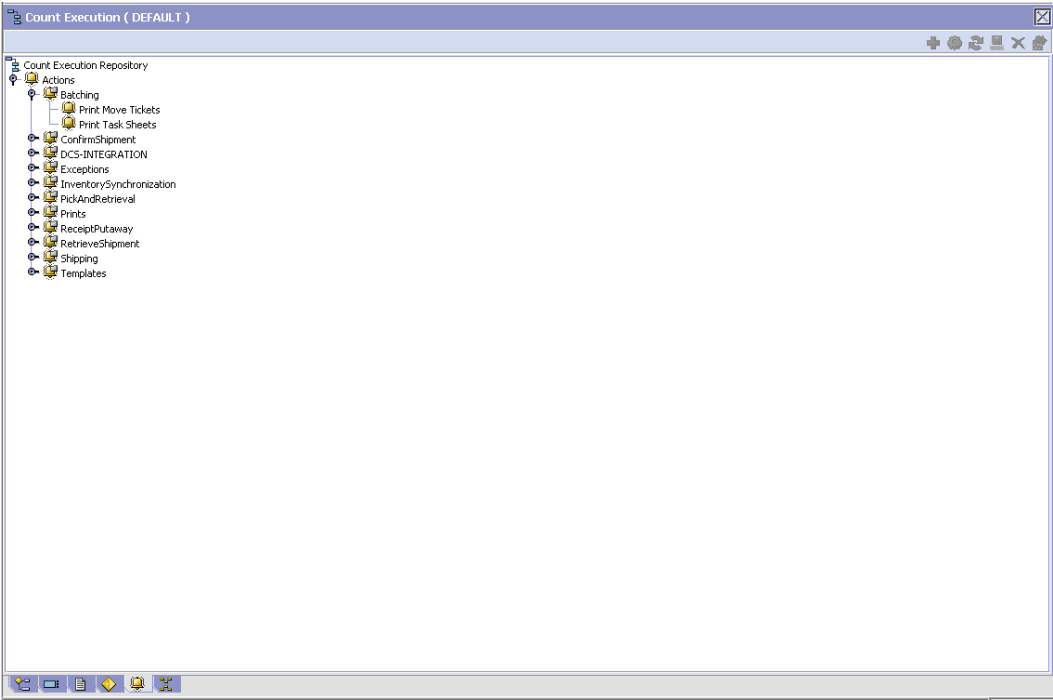


Table 4–38 Count Execution Pipeline - Actions Tab Window

Field	Description
Batching	Default settings are provided for: <b>Print Move Tickets</b> – Invokes the batch printing service for printing the move tickets. <b>Print Task Sheets</b> – Invokes the batch print service for printing the task sheets.
ConfirmShipment	Default settings are provided for: <b>ConfirmShipment</b> – Invokes the confirmShipment flow to confirm the shipment.



**Table 4–38 Count Execution Pipeline - Actions Tab Window**

Field	Description
DCS-Integration	<p>Default settings are provided for:</p> <p><b>InventoryDownload</b> – Invokes the YantraWMSInventoryDownloadService service to download the inventory information from Yantra 7x to Yantra DCS.</p> <p><b>PODownload</b> – Invokes the YantraWMSPODownloadService service to download the Purchase Order information from Yantra 7x to Yantra DCS.</p>
Exceptions	<p>Default settings are provided for:</p> <p><b>ShortagesDetected</b> – Invokes the LogWavePlaFailure exception service when shortage of inventory occurs during wave release.</p>
InventorySynchronization	<p>Default settings are provided for:</p> <p><b>CollectInventoryMismatch</b> – This service collects the inventory mismatch information between an external system and Yantra 7x. This is typically caused when some inventory updates at a node or a warehouse are not reported to Yantra 7x.</p>
PickAndRetrieval	<p>Default settings are provided for:</p> <p><b>ConfirmEmptyLocationAfterPick</b> – Invokes the GenerateCountRequest flow which creates a count request.</p>

*Table 4–38 Count Execution Pipeline - Actions Tab Window*

Field	Description
Prints	<p>Default settings are provided for:</p> <p><b>PickList Print</b> – Invokes the print service for printing the Pick List.</p> <p><b>LTl Manifest</b> – Invokes the print service for printing the Less-than Truck Load Manifest.</p> <p><b>Print Load BOL</b> – Invokes the print service for printing the Load Bill of Lading.</p> <p><b>Print PackList</b> – Invokes the print service for printing the Pack List.</p> <p><b>Print Post Pick Container Labels</b> – Invokes the print service for printing UCC-128 container labels for containers, when system defined packing process is used.</p> <p><b>Print Shipment BOL</b> – Invokes the print service for printing the Shipment Bill of Lading.</p> <p><b>Print Shipping Label</b> – Invokes the print service for printing the UCC-128 container labels.</p> <p><b>Print Wave</b> – Invokes the Print service for printing a Wave.</p>
ReceiptPutaway	<b>Putaway products on receipt closure</b> – Indicates the default action provided to automatically initiate putaway of purchase order receipts.
RetrieveShipment	<b>Retrieve Requested Serial</b> – This service invokes the retrieveShipment API to retrieve the requested serials to the specified location.

**Table 4–38 Count Execution Pipeline - Actions Tab Window**


Field	Description
Shipping	<p>Default settings are provided for:</p> <p><b>Load Left Origin</b> – Invokes the doLoadLeftOriginUpdates service to mark that the load has left the origin.</p> <p><b>Stop Shipping</b> – Invokes the RaiseStopShippingAlert service to raise an alert to stop the processing of the shipment.</p>
Templates	<p>Default settings are provided for:</p> <p><b>Log Exception</b> – Logs the reasons due to which a count request could not be created for a Count Program.</p> <p><b>Publish Data</b> – Sends data to external queue or internal tables.</p> <p><b>Raise Exception</b> – Raises an alert using Yantra 7x Event Management from the published information.</p> <p><b>Send Email</b> – Raises an email action to create an email in the template format from the published information.</p> <p><b>Send Email-HTML format</b> – Raises an email action to create an email in HTML format from the published information.</p>

#### 4.12.7.9 Service Definitions

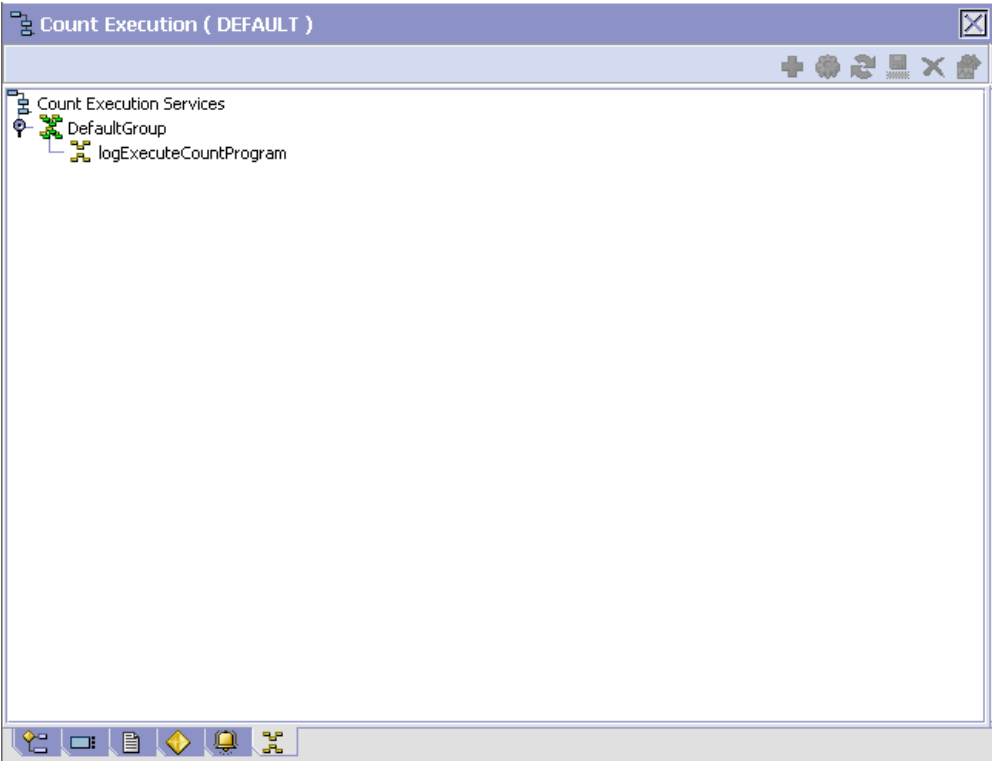
Service definitions are a representation of the logic that regulates document workflow services. The Service Builder is a graphical interface that enables you to create a graphical representation of these *services*.

For more information about Service Definitions, see *Yantra 7x Platform Configuration Guide*.

To view the service definition details of a count pipeline:

1. From the tree in the application rules side panel, choose Inventory > Count > Count Execution > Count Process Model. The Count Execution window is displayed.
2. In the Count Execution window, choose .
3. The Service Definitions tab window is displayed.

For more information about creating and modifying Service Definitions, see *Yantra 7x Platform Configuration Guide*.



**Table 4–39** *Count Execution Pipeline - Service Definitions Tab Window*

Field	Description
logExecuteCountProgram	This service creates an exception when no request is created during the execution of a count program.

4.12.8 Defining Count Strategy

Count Strategy defines the methodology to be followed while determining task type for count. The criteria used include zone, location size code, item classification, and the type of transaction requesting the task. A strategy uniquely defines each such combination.

For example, different task types can be configured to count hazardous zones and regular zones.

Use Count Strategy set-up for:



- [Setting Up a Count Strategy](#)
- [Modifying a Count Strategy](#)
- [Deleting a Count Strategy](#)

#### **4.12.8.1 Setting Up a Count Strategy**

To create a count strategy:

1. From the tree in the application rules side panel, choose Inventory > Count > Count Execution > Count Strategy. The Count Strategy Search window is displayed.

The screenshot shows two overlapping windows from a software application. The top window, titled "Count Strategy Search : Count ( DEFAULT / MA03 )", contains several input fields: "Activity Group" (set to "COUNT"), "Location Size Code" (a dropdown), "Request Type" (a dropdown), "Max Records" (set to "200"), "Zone" (a dropdown), "Transaction Id" (a dropdown), "Task Granularity" (a dropdown), and "Item Classification" (a section containing an "NMFC Code" field and a small icon). The bottom window, titled "Count Strategies", features a table with two columns: "Count Strategy Description" and "Task Type". The table is currently empty. At the bottom of this window, it displays "Results: 0 Of 0". Both windows have a status bar at the bottom that reads "Count Strategy Search : Count ( DEFAULT / MA03 )".

2. In the Count Strategy Search window, choose . The Count Strategy Details pop-up window appears.
3. Enter information in the applicable fields. Refer [Table 4–40](#) for field value descriptions.
4. Choose .

**Count Strategy Details**

Activity Group Id: COUNT

Count Strategy Description:

Zone:

Location Size Code:

Transaction Id:

Task Granularity:

Request Type:

Item Classification

NMFC Code:


Task Type:

☐ Put Location on count even if No Inventory

**Table 4–40 Count Strategy Details Pop-up Window**

Field	Description
Activity Group ID	Activity group id is populated automatically by the system.  This indicates the system defined activity group that the task type belongs to. Every task type belongs to an activity group.
Count Strategy Description	Enter a description for the count strategy.
Zone	Choose the zone for the count strategy.  This defines the zone for which the count request is created.
Location Size Code	Choose the location size code for the count strategy.  This defines the capacity of the location for which the count strategy is created.
Transaction ID	Choose the transaction id for the count strategy.  This defines the transaction id of the count request.

*Table 4–40 Count Strategy Details Pop-up Window*

Field	Description
Task Granularity	Choose the task granularity for the count strategy. This defines the task granularity for which the count strategy is created. Valid values are REQUEST and VARIANCE.
Request Type	<b>This defines the request type for the count. Typical values are Cycle Count, Physical Count and Manual Count.</b>
Item Classification	<b>This defines the item classification attributes for determining the count strategy.</b> <b>A maximum of three item classifications can be defined.</b> An example, Product Line is shown below.
Product Line	Choose relevant product line item classification for the count.  Choose  . In the Classification window, select the applicable product line classification.
Task Type	Choose the task type for the Count Strategy. The task types listed here belong to the 'COUNT' activity group. A task type defines the method of execution and productivity reasons. See <a href="#">Chapter 12, "Configuring Task Management"</a> on page 879.
<b>Put Location on count even if No Inventory</b>	<b>Select if</b> locations in a zone are eligible for count even though the system does not have inventory in those locations.  Note: This would be used for locations that are big and inventory movement from and to such locations are being done offline through paper. For example, sales floor location in a store.




#### 4.12.8.2 Modifying a Count Strategy

Once a count strategy has been created, it can be modified.

To modify a count strategy:

1. From the tree in the application rules side panel, choose Inventory > Count > Count Execution > Count Strategy. The Count Strategy Search window is displayed.





2. Enter applicable search criteria, and choose . Refer [Table 4–40](#) for field value descriptions.
3. A list of Count Strategies appears in the Count Strategies panel.
4. Select the Count Strategy to be modified. Choose .
5. The Count Strategy Details pop-up window is displayed. Refer [Table 4–40](#) for field value descriptions.
6. Enter information in the applicable fields.
7. Choose .

All modifications are effective for future transactions only.

#### 4.12.8.3 Deleting a Count Strategy

To delete a count strategy:

1. From the tree in the application rules side panel, choose Inventory > Count > Count Execution > Count Strategy. The Count Strategy Search window is displayed.
2. Enter applicable search criteria, and choose . Refer [Table 4–40](#) for field value descriptions.
3. A list of Count Strategies appears in the Count Strategies panel.
4. Select the Count Strategy to be deleted.
5. Choose .

### 4.12.9 Defining Purge Criteria

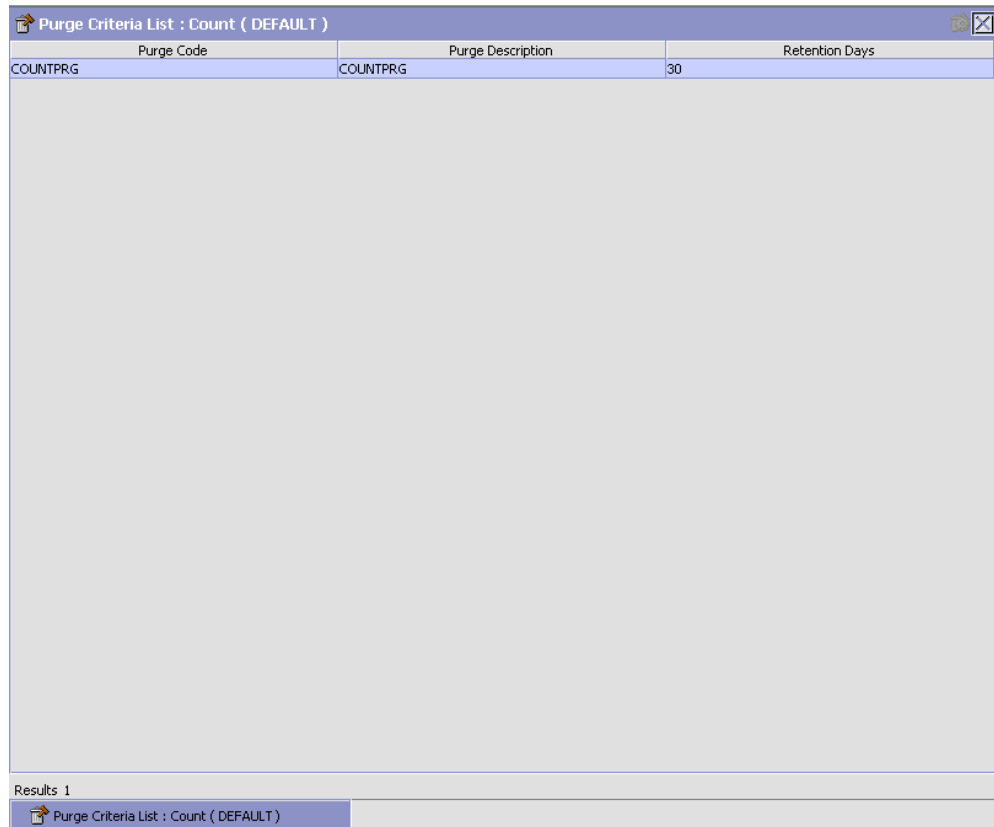
Transactional data collected by Yantra 7x WMS during execution are periodically removed from the 'live' transactional tables. It is common to retain order related information for extended periods of time. There are history tables provided for relevant transactional tables to move data from the day-to-day 'live' tables to a historical table.

Purge is the process by which old data is removed from the system database. A purge minimizes the number of unused database records to increase search efficiency and reduces the size of the required physical disk.

#### 4.12.9.1 Setting Up Purge Criteria

To set up purge criteria:

1. From the tree in the application rules side panel, choose Inventory > Count > Count Execution > Purge Criteria. The Purge Criteria List window is displayed.



2. In the Purge Criteria List window, choose . The Purge Criteria Details pop-up window appears.
3. Enter information in the applicable fields. Refer [Table 4–41](#) for field value descriptions.
4. Choose .

**Purge Criteria Details**

Purge Code:  Description:

Rollback Segment:  Retention Days:

☐ Write To Log File Log File Name:

**Table 4–41 Purge Criteria Details Pop-up Window**

Field	Description
Purge Code	Identifies a purge program. This is a system defined code.
Description	Description of the purge.
Rollback Segment	<p>Defines the rollback segment that should be explicitly used for the purge transaction qualified by the purge code.</p> <p>This is useful when there are huge logical data sets that have to be purged. This is optional and used for order related purges.</p>
Retention Days	Enter the number of days of data to be retained in the database (going backwards from the time the program runs). Make sure that your table size takes into account the number of retention days entered here.
Write To Log File	Check this box if you want purged data written to a log. The log can be backed up and used as a journal at a later date.
Log File Name	<p>Enter a log file name. This is applicable only if 'Write To Log File' is checked. This file consists records of the specific table that is purged.</p> <p>The log file is created in the directory specified in the <code>yfs.purge.path</code> of <code>yfs.properties</code>. If a variable is introduced, then <code>yfs.purge.path</code> is ignored. For more information on using variables for the log file directory refer to <i>Yantra 7x Customization Guide</i>.</p> <p>For information about filename limitations related to internationalization, see the <i>Yantra 7x Localization Guide</i>.</p>

### 4.12.10 Defining Corporate Count Request Purge Criteria

Transactional data collected by Yantra 7x WMS during the execution are periodically removed from the 'live' transactional tables. It is common to retain order related information for extended periods of time. There are history tables provided for relevant transactional tables to move data from the day-to-day 'live' tables to a historical table.



Purge is the process by which old data is removed from the system database. A purge minimizes the number of unused database records to increase search efficiency and reduces the size of the required physical disk.

#### 4.12.10.1 Setting Up Corporate Count Request Purge Criteria

To set up purge criteria:

1. From the tree in the application rules side panel, choose Inventory > Count > Count Execution > Corporate Count Request Purge Criteria. The Purge Criteria List window is displayed.

Purge Criteria List : Count ( DEFAULT )		
Purge Code	Purge Description	Retention Days
COUNTPROGPRG	Corporate Count Request Purge	30
Results 1		
Purge Criteria List : Count ( DEFAULT )		

2. In the Purge Criteria List window, choose . The Purge Criteria Details pop-up window appears.
3. Enter information in the applicable fields. Refer [Table 4–41](#) for field value descriptions.
4. Choose .



## Configuring Receiving

---

The process of receiving a product in the warehouse is based on the attributes of the shipment. The rules and activities expected to be performed for inventory being received is configured here.

Inventory is received in the warehouse either through a Purchase Order, Transfer Order or due to a Return. Typically, a transfer order is placed from another warehouse in the network, while purchase orders are received from outside vendors. The process of receiving product from diverse sources such as these differs in a warehouse.

The receiving configuration in a warehouse is broken up into the activities that are performed upon receipt, the method of putaway by utilizing warehouse, zone and item constraints.

The business processes to be followed are specified individually for Purchase Order, Transfer Order and Return Order. The process definitions include pipeline to be used, modification rules for orders and disposition codes.

Use Receiving for:

- [Defining Activities](#)
- [Defining Putaway Preferences](#)
- [Defining Purchase Order](#)
- [Defining Transfer Order](#)
- [Defining Return Order](#)
- [Defining Vendors](#)
- [Defining Location Storage Codes](#)
- [Defining Zone Constraints](#)

## 5.1 Defining Activities

Activities in the warehouse are grouped into Activity Groups. Yantra 7x WMS provides a pre-defined set of activity groups for a warehouse. Examples of activity groups include Receiving, VAS, Picking and Packing.

Each activity group is associated with activity codes that define each activity that is performed. For example, receiving activity group has pre-receiving, Packing and receiving activities.

The list here is specific to the Receiving process.

---

---

**Note:** Activity Codes may be defined only when the WMS tree is loaded for Node / Hub combination.

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Use Activities for:

- [Creating an Activity Code](#)
- [Modifying an Activity Code](#)
- [Deleting an Activity Code](#)

### 5.1.1 Creating an Activity Code

To create an activity code:

1. From the tree in the application rules side panel, choose Receiving > Activities. The Activities window is displayed.
2. Enter information in the applicable fields. Refer [Table 5–1](#) for field value descriptions.
3. Choose .



**Activities ( DEFAULT )**

Activity Group:

Activity Code	Description
RECEIVE	Receive
PRE-RECV	Pre-Receive
RECEIVE-RETURN	Receive-Return
TRAILER-UNLOAD	Trailer Unloading
QC	Quality Check - Receipt
DEFAULT	Default - Receipt
*	

Results 6 Of 6

**Activities ( DEFAULT )**


**Table 5–1 Activities Window**

Field	Description
Activity Group	This is automatically populated by the system as 'RECEIPT'.
<b>Activity List</b>	
Activity Code	Enter a name for the activity code. Activity code is the unique identity of the activity.
Description	Enter a brief description for the activity code.

### 5.1.2 Modifying an Activity Code

Once an activity code has been created, it can be modified.


To modify an activity code:

1. From the tree in the application rules side panel, choose Receiving > Activities. The Activities window is displayed, with the list of activities.
2. Enter information in the applicable fields. Refer [Table 5–1](#) for field value descriptions.
3. Choose .

*It is recommended that the Yantra 7x WMS provided list of activity codes are not modified.*

### 5.1.3 Deleting an Activity Code

To delete an activity code:

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

*It is recommended that the Yantra 7x WMS provided list of activity codes are not deleted.*

## 5.2 Defining Putaway Preferences

Inventory being received at the dock require to be putaway to appropriate locations, based on shipment attributes, item classifications and location attributes.

The preferences for putting away of inventory is specified by zone and location storage attributes, for the SKU and container attributes.

---

**Note:** When configuring Putaway and Retrieval Preferences, do not select Zones containing "VIRTUAL" and "INTRANSIT" location type. However, you can select Zones containing "STAGING" location type only if it is associated with a station.

---

Use Putaway Preferences for:

- [Setting Up Putaway Preference for Single SKU](#)
- [Setting Up Putaway Preference for Multi-SKU/Multi-Level Container](#)
- [Setting Up Putaway Preference for Container with Unknown Contents](#)

## 5.2.1 Setting Up Putaway Preference for Single SKU

The preferences for the putaway of a single SKU are specified here.


For example, the putaway preference for a CASE, PALLET and loose quantity of a single SKU being putaway are specified here.

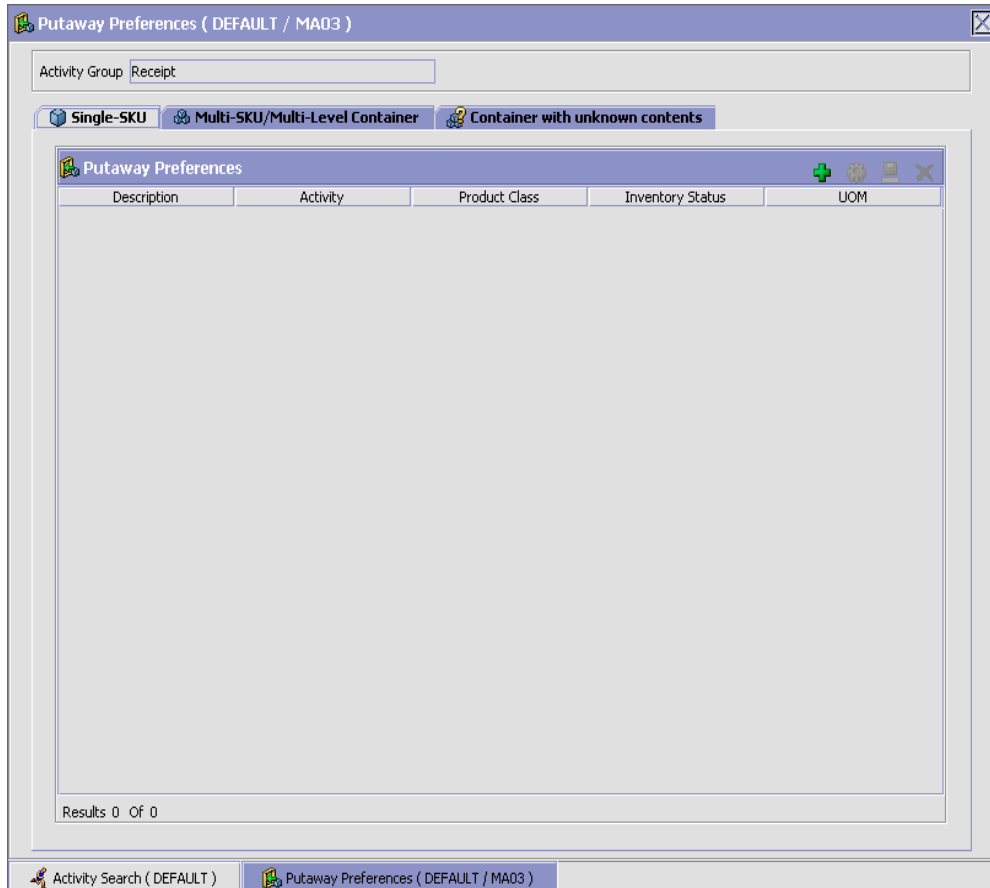
Use Putaway Preference for Single SKU set-up for:



- [Creating a Putaway Preference for Single SKU](#)
- [Creating a New Putaway Preference for Single SKU from an Existing Putaway Preference](#)
- [Modifying a Putaway Preference for Single SKU](#)
- [Deleting a Putaway Preference for Single SKU](#)

### 5.2.1.1 Creating a Putaway Preference for Single SKU

To create a putaway preference for single SKU:

1. From the tree in the application rules side panel, choose Receiving > Putaway Preferences. The Putaway Preferences window is displayed.
2. Alternatively, choose  in the Activity Search window to access Putaway Preferences window.
3. In the Putaway Preferences window, choose the Single-SKU tab. The Single-SKU tab window is displayed.



4. In the Single-SKU tab window, choose .
5. The Putaway Preference Details window appears.
6. Enter information in the applicable fields. Refer [Table 5–2](#) for field value descriptions.
7. Choose .

Putaway Preference Details ( SS-INV-ORG / FZ ) : Single-SKU

Activity Group

Receipt

To View Strategy Click here

Description

Activity Code

Packing

Inventory Status

Normal

Segment

Container Type

Pallet

Product Class

SFC

Segment Type

MTO

UOM

PALLET

Allow Split Pallet

Item Classification

Product Line

StorageType

Product Line


Zone Priorities

	Priority	Zone	Storage Code
*			


Results 0 Of 0

Configuring Receiving 281

**Table 5–2 Putaway Preference Details Window (Single SKU)**

Field	Description
Activity Group	This is automatically populated by the system as 'RECEIPT'.
To View Strategy Click here	Choose  to view or set up Putaway Strategy. For more details about Setting Up Putaway Strategy, see <a href="#">Setting Up Putaway Strategy for Single-SKUs</a> . Note: Putaway strategy may be specified for the putaway preferences after the preference is saved.
Description	Enter a brief description for the putaway preference.
Activity Code	Choose the Activity Code for the putaway preference. This is a mandatory field. Putaway looks for locations defined for "Moving to storage" or "On Close Receipt".
Product Class	Choose the product class for the preference, if applicable. Product class is the inventory classification of an item based on product's characteristics. Typical values are FQ - First Quality, SQ - Second Quality, etc.
Inventory Status	Choose the inventory status for the preference, if applicable. Inventory status refers to an inventory sub classification based on the results of the inventory control processes within the warehouse.
Segment Type	Enter the segment type for the preference, if applicable. This indicates an inventory category. Typical values are MTC – Made to Customer, and MTO - Made to Order.
Segment	Enter the segment number for the preference, if applicable. A segment holds either the specific buyer or specific order number that requires dedication.
UOM	Choose the UOM for the preference, if applicable. UOM points to the unit of measure of the item.

**Table 5–2 Putaway Preference Details Window (Single SKU)**


Field	Description
Container Type	The container type associated with the UOM selected is displayed. If the UOM is not selected, you can choose the container type for the preference, if applicable. Typical values are "Pallet" and "Case".
Allow Split Pallet	Select this to split the pallet and move items to multiple locations.  This box is automatically checked when you choose a pallet container type.  The Zone Priorities panel will not display if you choose pallet container type and UOM is not selected.
Item Classification	<b>List of putaway item classifications for the Enterprise are displayed. An example, Product Line is shown below.</b>
Product Line	Choose relevant product line item classification for the putaway activity.  Choose  . In the Classification window, select the applicable product line classification.
<b>Zone Priorities</b>	
Priority	Enter a number to represent the priority.  The priority is used to sequence the order in which the zone priorities are evaluated. For example, all storage code level priorities are to be evaluated first before generic priorities.  The priority needs to be a positive integer, greater than zero. This is mandatory.
Zone	Choose the relevant zone to be used as the target zone for putaway.  This is a mandatory field.
Storage Code	Choose the storage code for the zone, if applicable.  This limits the locations being evaluated to the storage code specified. For example, putaway of hazardous items into a zone are restricted to the locations having the appropriate storage code.

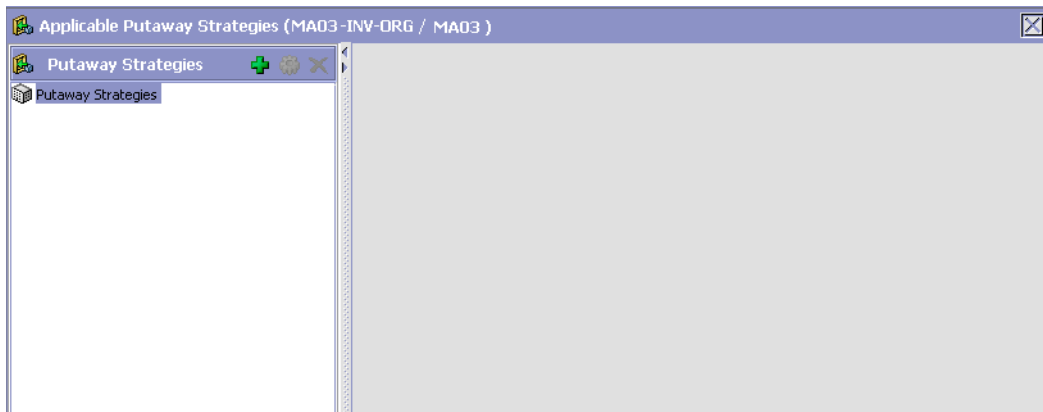
*Putaway strategy may be specified for the putaway preferences after the preference is saved. This is specified at an item classification and UOM level, if applicable.*



### Setting Up Putaway Strategy for Single-SKUs

You can set up putaway strategies to putaway applicable inventory received from a source zone to a target zone, based on the strategy specified.

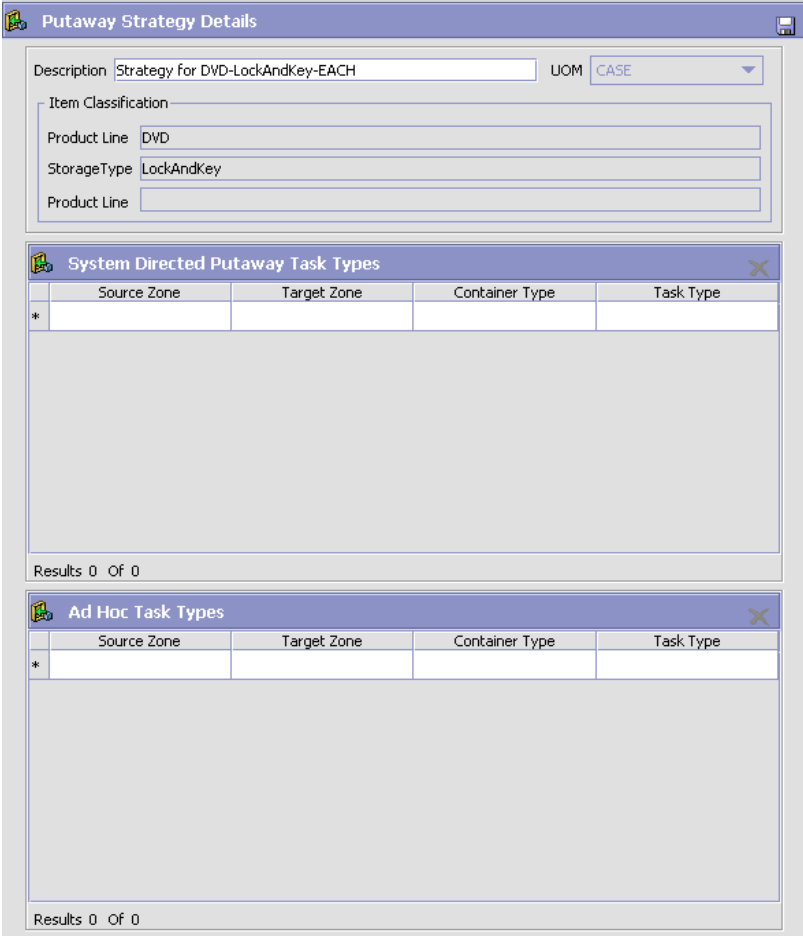
To set up putaway strategy for single-SKUs:

1. In the Putaway Preference Details : Single SKU window, choose .
2. The Applicable Putaway Strategies window is displayed.



3. Choose  in the Putaway Strategies panel. The Putaway Strategy Details window appears in the right panel.
4. Enter information in the applicable fields. See the Putaway Strategy Details Window table for field value descriptions.
5. Choose .





**Putaway Strategy Details**

Description: Strategy for DVD-LockAndKey-EACH UOM: CASE

Item Classification

Product Line: DVD

StorageType: LockAndKey

Product Line:

**System Directed Putaway Task Types**

	Source Zone	Target Zone	Container Type	Task Type
*				

Results 0 Of 0

**Ad Hoc Task Types**




	Source Zone	Target Zone	Container Type	Task Type
*				

Results 0 Of 0

**Table 5–3 Putaway Strategy Details Window**

Field	Description
Description	Enter a description for the Putaway Strategy.
UOM	Select the UOM for the Putaway Strategy, if applicable. Note: The UOM will be defaulted in instances where it has been specified in the Putaway Preference Details screen.

**Table 5–3 Putaway Strategy Details Window**




Field	Description
<b>Item Classification</b>	List of putaway item classifications for the Enterprise are displayed. An example, Product Line is shown below.
Product Line	Choose relevant product line item classification for the putaway activity.  Choose  . In the Classification Values window, select the applicable product line classification.
<b>System Directed Putaway Task Types</b>	<b>Displays the list of existing system directed putaway task types.</b>  <b>You may use  to delete an existing system directed putaway task type.</b>
Source Zone	Select the source zone where inventory is available.
Target Zone	Select the target zone where you want to move the inventory.
Container Type	Select the container type to be used to move the inventory from the source zone to the target zone. Typical values are Case and Pallet.
Task Type	Select the Putaway Task Type applicable to this putaway strategy. This field displays the list of existing system directed task types that belong to the 'PUTAWAY' activity group.
<b>Ad hoc Task Types</b>	<b>Displays the list of existing ad hoc task types.</b>  <b>You may use  to delete an existing ad hoc task type.</b>
Source Zone	Select the source zone where inventory is available.
Target Zone	Select the target zone where you want to move the inventory.

**Table 5–3 Putaway Strategy Details Window**

Field	Description
Container Type	Select the container type to be used to move the inventory from the source zone to the target zone. Typical values are Case and Pallet.
Task Type	Select the Putaway Task Type applicable to this putaway strategy. This field displays the list of existing ad hoc task types that belong to the 'PUTAWAY' activity group.

### 5.2.1.2 Creating a New Putaway Preference for Single SKU from an Existing Putaway Preference

To create a new putaway preference for single SKU from an existing putaway preference:




1. From the tree in the application rules side panel, choose Receiving > Putaway Preferences. The Putaway Preferences window is displayed.
2. Alternatively, choose  in the Activity Search window to access Putaway Preferences window.
3. In the Putaway Preferences window, choose the Single-SKU tab.
4. The Single-SKU tab window is displayed, with the list of putaway preferences.
5. Select the putaway preference to be copied from. Choose .
6. The Putaway Preference Details window is displayed.
7. Enter information in the applicable fields. Refer [Table 5–2](#) for field value descriptions.
8. Choose .

### 5.2.1.3 Modifying a Putaway Preference for Single SKU

Once a Putaway Preference for Single SKU has been created, it can be modified.

To modify a putaway preference for single SKU:



1. From the tree in the application rules side panel, choose Receiving > Putaway Preferences. The Putaway Preferences window is displayed.

2. Alternatively, choose  in the Activity Search window to access Putaway Preferences window.
3. In the Putaway Preferences window, choose the Single-SKU tab.
4. The Single-SKU tab window is displayed, with the list of putaway preferences.
5. Select the putaway preference to be modified. Choose .
6. The Putaway Preference Details window is displayed.
7. Enter information in the applicable fields. Refer [Table 5–2](#) for field value descriptions.
8. Choose .

Only the description and item classification values not previously used may be specified. Additional zone priorities may also be specified. For all other changes, the preference must be deleted.

### 5.2.1.4 Deleting a Putaway Preference for Single SKU

To delete a putaway preference for single SKU:

1. From the tree in the application rules side panel, choose Receiving > Putaway Preferences. The Putaway Preferences window is displayed.
2. Alternatively, choose  in the Activity Search window to access Putaway Preferences window.
3. In the Putaway Preferences window, choose the Single-SKU tab.
4. The Single-SKU tab window is displayed, with the list of putaway preferences.
5. Select the putaway preference to be deleted.
6. Choose .

### 5.2.2 Setting Up Putaway Preference for Multi-SKU/Multi-Level Container


The preferences for the putaway of a multi-level case or pallet are specified here. This also applies to multi-SKU CASE with LPN and PALLET with LPN.

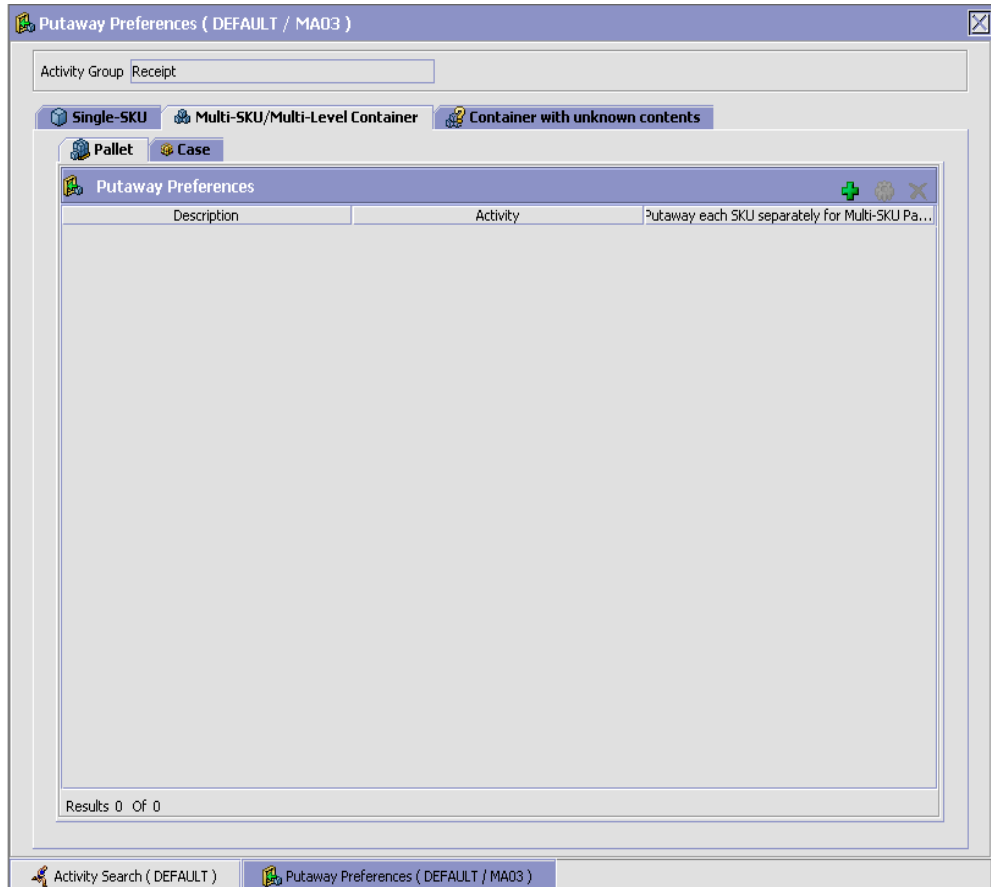
Use the Putaway Preference for Multi-SKU/Multi-Level Container set-up for:

- [Creating a Putaway Preference for Multi-SKU/Multi-Level Container](#)
- [Creating a New Putaway Preference for Multi-SKU/Multi-Level Container from an Existing Putaway Preference](#)
- [Modifying a Putaway Preference for Multi-SKU/Multi-Level Container](#)
- [Deleting a Putaway Preference for Multi-SKU/Multi-Level Container](#)

### **5.2.2.1 Creating a Putaway Preference for Multi-SKU/Multi-Level Container**

To create a putaway preference for multi-SKU/multi-level container:

1. From the tree in the application rules side panel, choose Receiving > Putaway Preferences. The Putaway Preferences window is displayed.
2. Alternatively, choose  in the Activity Search window to access Putaway Preferences window.
3. In the Putaway Preferences window, choose the Multi-SKU/Multi-Level Container tab. The Multi-SKU/Multi-Level Container tab window is displayed.





Putaway preferences for multi-level cases or pallets are specified separately:


- [Setting Up Putaway Preference for a Multi-Level Pallet](#)
- [Setting Up Putaway Preference for a Multi-Level Case](#)

### 5.2.2.1.1 Setting Up Putaway Preference for a Multi-Level Pallet


To set up putaway preference for a multi-level pallet:

1. In the Multi-SKU/Multi-Level Container tab of Putaway Preferences window, choose the Pallet tab. The Pallet tab window is displayed.
2. In the Pallet tab window, choose .
3. The Putaway Preference Details window appears.
4. Enter information in the applicable fields. Refer [Table 5–4](#) for field value descriptions.
5. Choose .


**Putaway Preference Details ( DEFAULT / MA03 ) : Multi-SKU/Multi-Level Container : Pallet**

Activity Group: Receipt To View Strategy Click here 

Description:

Activity Code:  

☐ Putaway each SKU separately for Multi-SKU Pallets


**Zone Priorities** 

	Priority	Zone	Storage Code
*			

Results 0 Of 0

Activity Search ( DEFAULT ) Putaway Preferences ( DEFAULT / MA03 ) Putaway Preference Details ( DEFAULT / ...

**Table 5–4 Putaway Preference Details Window (Multi-Level Pallet)**

Field	Description
Activity Group	This is automatically populated by the system as 'RECEIPT'.
To View Strategy Click here	<p>Choose  to view or set up Putaway Strategy. For more details about Setting Up Putaway Strategy, see <a href="#">Setting Up Putaway Strategy for Multi-SKU/Multi-Level Containers - Pallets</a>.</p> <p>Note: Putaway strategy may be specified for the putaway preferences after the preference is saved.</p>
Description	Enter a brief description for the putaway preference.
Activity Code	Choose the Activity Code for the putaway preference. This is a mandatory field.
Put away each SKU separately for Multi-SKU Pallets	<p>Select if each SKU on the multi-SKU pallet is evaluated individually.</p> <p>If selected, the putaway preferences for a single SKU are evaluated for the multi-SKU pallet. The Zone Priorities Panel is removed on this selection.</p>
<b>Zone Priorities</b>	
Priority	<p>Enter a number to represent the priority.</p> <p>The priority is used to sequence the order in which the zone priorities are evaluated. For example, all storage code level priorities are to be evaluated first before generic priorities.</p> <p>The priority needs to be a positive integer, greater than zero. This is mandatory.</p>
Zone	<p>Choose the relevant zone for putaway.</p> <p>This is a mandatory field.</p>
Storage Code	<p>Choose the storage code for the zone, if applicable.</p> <p>This limits the locations being evaluated to the storage code specified. For example, putaway of hazardous items into a zone are restricted to the locations having the appropriate storage code.</p>




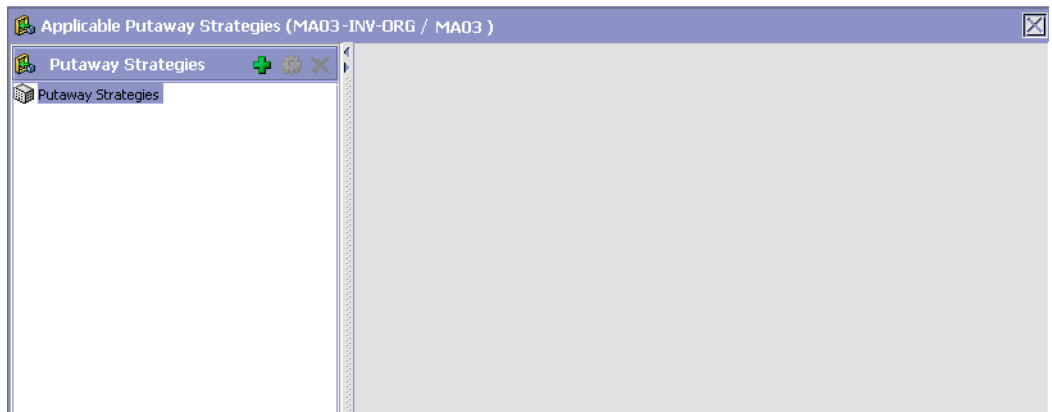
*Putaway strategy may be specified for the putaway preferences after the preference is saved. This is specified at an item classification and UOM level, if applicable.*



### Setting Up Putaway Strategy for Multi-SKU/Multi-Level Containers - Pallets

You can set up putaway strategies to putaway applicable inventory from a source zone to a target zone, based on the strategy specified.

To set up putaway strategy for multi-SKU/multi-level container pallets:

1. In the Putaway Preference Details : Multi-SKU/multi-level Containers : Pallet window, choose .
2. The Applicable Putaway Strategies window is displayed.



3. Choose  in the Putaway Strategies panel. The Putaway Strategy Details window appears in the right panel.
4. Enter information in the applicable fields. See the Putaway Strategy Details Window table for field value descriptions.
5. Choose .

Putaway Strategy Details

DescriptionStrategy for DVD-LockAndKey-EACHUOMCASE

Item Classification

Product LineDVD

StorageTypeLockAndKey

Product Line

System Directed Putaway Task Types

	Source Zone	Target Zone	Container Type	Task Type
*				

Results 0 Of 0

Ad Hoc Task Types




	Source Zone	Target Zone	Container Type	Task Type
*				

Results 0 Of 0

Table 5–5 Putaway Strategy Details Window

Field	Description
Description	Enter a description for the Putaway Strategy.
UOM	Select the UOM for the Putaway Strategy, if applicable. Note: The UOM will be defaulted in instances where it has been specified in the Putaway Preference Details screen.

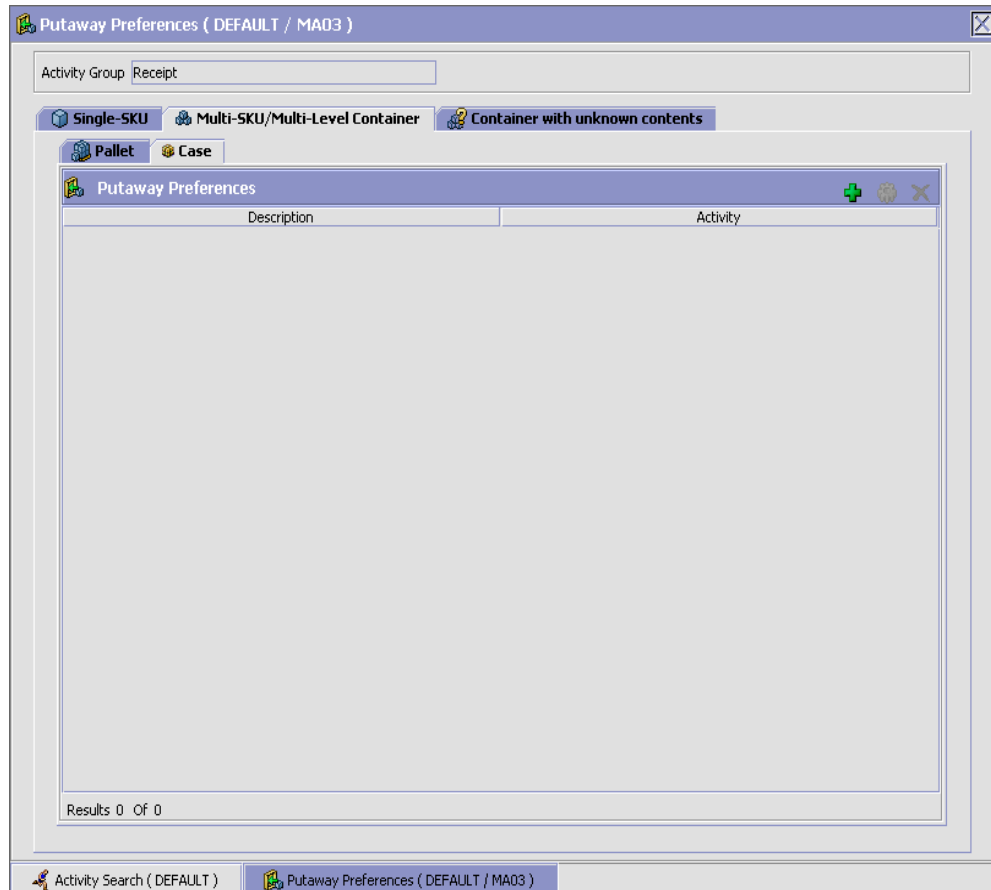
**Table 5–5 Putaway Strategy Details Window**


Field	Description
<b>Item Classification</b>	List of putaway item classifications for the Enterprise are displayed. An example, Product Line is shown below.
Product Line	Choose relevant product line item classification for the putaway activity.  Choose  . In the Classification Values window, select the applicable product line classification.
<b>System Directed Putaway Task Types</b>	<b>Displays the list of existing system directed putaway task types.</b>  <b>You may use  to delete an existing system directed putaway task type.</b>
Source Zone	Select the source zone where inventory is available.
Target Zone	Select the target zone where you want to move the inventory.
Container Type	Select the container type to be used to move the inventory from the source zone to the target zone. Typical values are Case and Pallet.
Task Type	Select the Putaway Task Type applicable to this putaway strategy. This field displays the list of existing system directed task types that belong to the 'PUTAWAY' activity group.
<b>Ad hoc Task Types</b>	<b>Displays the list of existing ad hoc task types.</b>  <b>You may use  to delete an existing ad hoc task type.</b>
Source Zone	Select the source zone where inventory is available.
Target Zone	Select the target zone where you want to move the inventory.
Container Type	Select the container type to be used to move the inventory from the source zone to the target zone. Typical values are Case and Pallet.
Task Type	Select the Putaway Task Type applicable to this putaway strategy. This field displays the list of existing ad hoc task types that belong to the 'PUTAWAY' activity group.


### 5.2.2.1.2 Setting Up Putaway Preference for a Multi-Level Case


To set up putaway preference for a multi-level case:


1. In the Multi-SKU/Multi-Level Container tab of Putaway Preferences window, choose the Case tab. The Case tab window is displayed.




2. In the Case tab window, choose .
3. The Putaway Preference Details window appears.
4. Enter information in the applicable fields. Refer [Table 5–6](#) for field value descriptions.



5. Choose .

 Putaway Preference Details ( DEFAULT / MA03 ) : Multi-SKU/Multi-Level Container : Case

Activity Group  To View Strategy Click here 




Description

Activity Code  


 Zone Priorities 

	Priority	Zone	Storage Code
*			

Results 0 Of 0

 Activity Search ( DEFAULT )    Putaway Preferences ( DEFAULT / MA03 )    Putaway Preference Details ( DEFAULT / ...

**Table 5–6 Putaway Preference Details Window (Multi-Level Case)**


Field	Description
Activity Group	This is automatically populated by the system as 'RECEIPT'.
To View Strategy Click here	<p>Choose  to view or set up Putaway Strategy. For more details about Setting Up Putaway Strategy, see <a href="#">Setting Up Putaway Strategy for Multi-SKU/Multi-Level Containers - Cases</a>.</p> <p>Note: Putaway strategy may be specified for the putaway preferences after the preference is saved.</p>
Description	Enter a brief description for the putaway preference.
Activity Code	Choose the Activity Code for the putaway preference. This is a mandatory field.
<b>Zone Priorities</b>	
Priority	<p>Enter a number to represent the priority.</p> <p>The priority is used to sequence the order in which the zone priorities are evaluated. For example, all storage code level priorities are to be evaluated first before generic priorities.</p> <p>The priority needs to be a positive integer, greater than zero. This is mandatory.</p>
Zone	Choose the relevant zone for putaway. This is a mandatory field.
Storage Code	<p>Choose the storage code for the zone, if applicable.</p> <p>This limits the locations being evaluated to the storage code specified. For example, putaway of hazardous items into a zone are restricted to the locations having the appropriate storage code.</p>

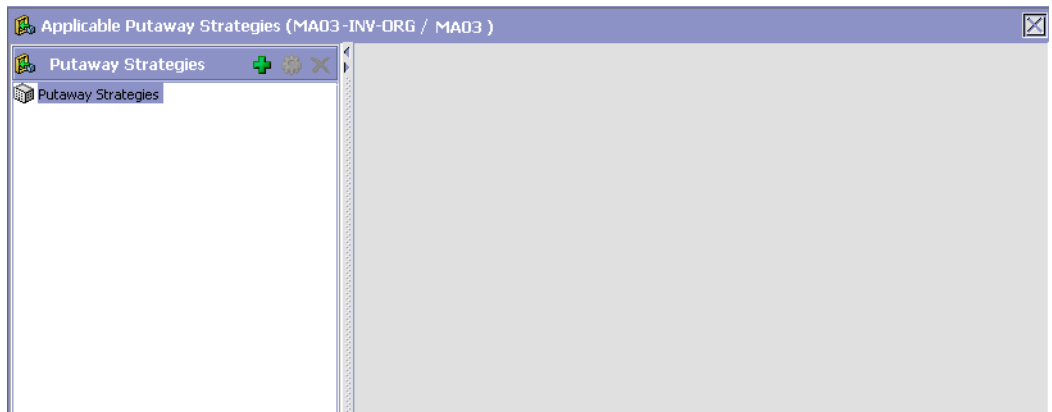
*Putaway strategy may be specified for the putaway preferences after the preference is saved. This is specified at an item classification and UOM level, if applicable.*



## Setting Up Putaway Strategy for Multi-SKU/Multi-Level Containers - Cases

You can set up putaway strategies to putaway applicable inventory from a source zone to a target zone, based on the strategy specified.

To set up putaway strategy for multi-SKU/multi-level container cases:

1. In the Putaway Preference Details : Multi-SKU/multi-level Containers : Case window, choose .
2. The Applicable Putaway Strategies window is displayed.



3. Choose  in the Putaway Strategies panel. The Putaway Strategy Details window appears in the right panel.
4. Enter information in the applicable fields. See the Putaway Strategy Details Window table for field value descriptions.
5. Choose .

Putaway Strategy Details

DescriptionStrategy for DVD-LockAndKey-EACHUOMCASE

Item Classification

Product LineDVD

StorageTypeLockAndKey

Product Line

System Directed Putaway Task Types

	Source Zone	Target Zone	Container Type	Task Type
*				

Results 0 Of 0

Ad Hoc Task Types

	Source Zone	Target Zone	Container Type	Task Type
*				




Results 0 Of 0

Table 5–7 Putaway Strategy Details Window

Field	Description
Description	Enter a description for the Putaway Strategy.
UOM	Select the UOM for the Putaway Strategy, if applicable. Note: The UOM will be defaulted in instances where it has been specified in the Putaway Preference Details screen.






**Table 5–7 Putaway Strategy Details Window**

Field	Description
<b>Item Classification</b>	List of putaway item classifications for the Enterprise are displayed. An example, Product Line is shown below.
Product Line	Choose relevant product line item classification for the putaway activity.  Choose  . In the Classification Values window, select the applicable product line classification.
<b>System Directed Putaway Task Types</b>	<b>Displays the list of existing system directed putaway task types.</b>  <b>You may use  to delete an existing system directed putaway task type.</b>
Source Zone	Select the source zone where inventory is available.
Target Zone	Select the target zone where you want to move the inventory.
Container Type	Select the container type to be used to move the inventory from the source zone to the target zone. Typical values are Case and Pallet.
Task Type	Select the Putaway Task Type applicable to this putaway strategy. This field displays the list of existing system directed task types that belong to the 'PUTAWAY' activity group.
<b>Ad hoc Task Types</b>	<b>Displays the list of existing ad hoc task types.</b>  <b>You may use  to delete an existing ad hoc task type.</b>
Source Zone	Select the source zone where inventory is available.
Target Zone	Select the target zone where you want to move the inventory.
Container Type	Select the container type to be used to move the inventory from the source zone to the target zone. Typical values are Case and Pallet.
Task Type	Select the Putaway Task Type applicable to this putaway strategy. This field displays the list of existing ad hoc task types that belong to the 'PUTAWAY' activity group.

### 5.2.2.2 Creating a New Putaway Preference for Multi-SKU/Multi-Level Container from an Existing Putaway Preference


To create a new putaway preference for multi-SKU/multi-level container from an existing putaway preference:



1. From the tree in the application rules side panel, choose Receiving > Putaway Preferences. The Putaway Preferences window is displayed.
2. Alternatively, choose  in the Activity Search window to access Putaway Preferences window.
3. In the Putaway Preferences window, choose the Multi-SKU/Multi-Level Container tab.
4. The Multi-SKU/Multi-Level Container tab window is displayed, with the list of putaway preferences.
5. Select the putaway preference to be copied. Choose .
6. The Putaway Preference Details window is displayed.
7. Enter information in the applicable fields. For more information about modifying the fields, refer to [Section 5.2.2.1.1, "Setting Up Putaway Preference for a Multi-Level Pallet"](#) on page 290 and [Section 5.2.2.1.2, "Setting Up Putaway Preference for a Multi-Level Case"](#) on page 296.
8. Choose .

### 5.2.2.3 Modifying a Putaway Preference for Multi-SKU/Multi-Level Container

Once a Putaway Preference for Multi-SKU/Multi-Level Container has been created, it can be modified.

To modify a putaway preference for multi-SKU/multi-level container:



1. From the tree in the application rules side panel, choose Receiving > Putaway Preferences. The Putaway Preferences window is displayed.
2. Alternatively, choose  in the Activity Search window to access Putaway Preferences window.
3. In the Putaway Preferences window, choose the Multi-SKU/Multi-Level Container tab.

4. The Multi-SKU/Multi-Level Container tab window is displayed, with the list of putaway preferences.
5. Select the putaway preference to be modified. Choose .
6. The Putaway Preference Details window is displayed.
7. Enter information in the applicable fields. For more information about modifying the fields, refer to [Section 5.2.2.1.1, "Setting Up Putaway Preference for a Multi-Level Pallet"](#) on page 290 and [Section 5.2.2.1.2, "Setting Up Putaway Preference for a Multi-Level Case"](#) on page 296.
8. Choose .

The activity code corresponding to the preference cannot be modified. The preference must be deleted and recreated.

#### 5.2.2.4 Deleting a Putaway Preference for Multi-SKU/Multi-Level Container

To delete a putaway preference for multi-SKU/multi-level container:

1. From the tree in the application rules side panel, choose Receiving > Putaway Preferences. The Putaway Preferences window is displayed.
2. Alternatively, choose  in the Activity Search window to access Putaway Preferences window.
3. In the Putaway Preferences window, choose the Multi-SKU/Multi-Level Container tab.
4. The Multi-SKU/Multi-Level Container tab window is displayed, with the list of putaway preferences.
5. Select the putaway preference to be deleted.
6. Choose .

### 5.2.3 Setting Up Putaway Preference for Container with Unknown Contents

The preferences for the putaway of container with unknown contents are specified here. This applies to case and pallet with LPN where contents are not known.


For example, pre-receipt steps during receiving or returns where LPN labels may be scanned. Also, this applies to containers that are cross-docked to shipping lane upon receipt in merge in-transit centers.

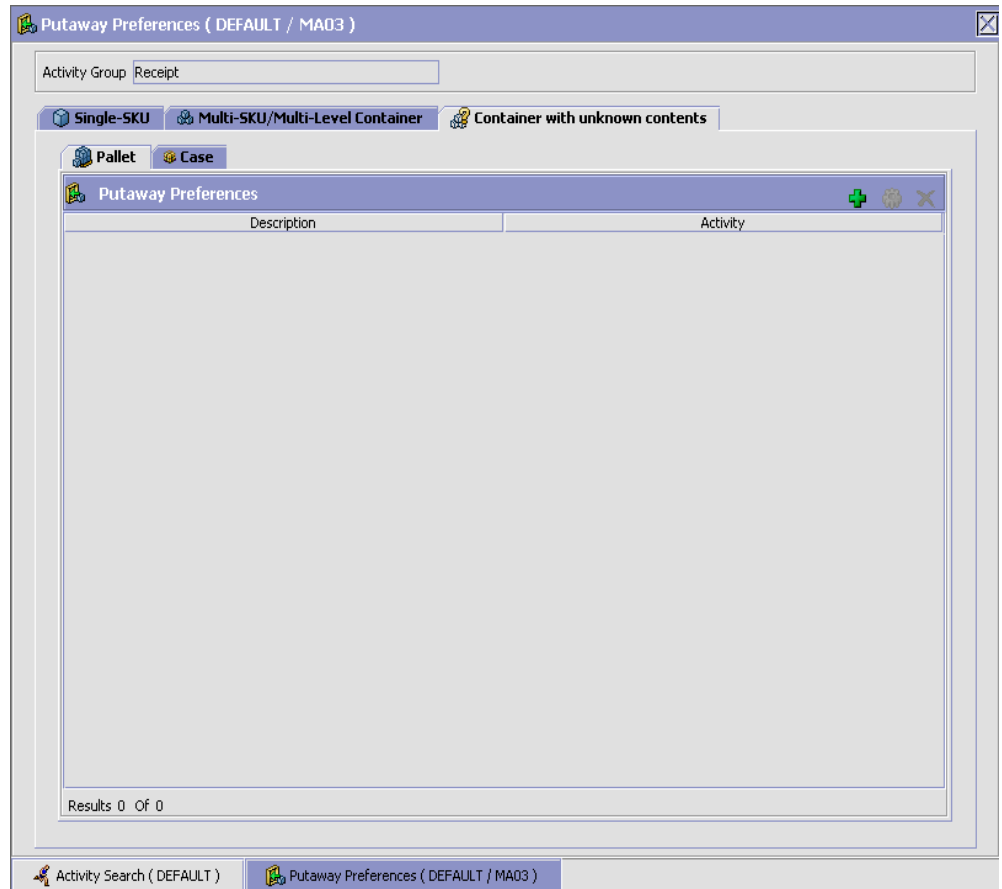
Use Putaway Preference for Container with Unknown Contents set-up for:

- [Creating a Putaway Preference for Container with Unknown Contents](#)
- [Creating a New Putaway Preference for Container with Unknown Contents from an Existing Putaway Preference](#)
- [Modifying a Putaway Preference for Container with Unknown Contents](#)
- [Deleting a Putaway Preference for Container with Unknown Contents](#)

### 5.2.3.1 Creating a Putaway Preference for Container with Unknown Contents

To create a putaway preference for container with unknown contents:

1. From the tree in the application rules side panel, choose Receiving > Putaway Preferences. The Putaway Preferences window is displayed.
2. Alternatively, choose  in the Activity Search window to access Putaway Preferences window.
3. In the Putaway Preferences window, choose the Container with Unknown Contents tab. The Container with Unknown Contents tab window is displayed.





Putaway preferences are separately specified for a pallet and case:

- [Setting Up Putaway Preference for a Pallet](#)
- [Setting Up Putaway Preference for a Case](#)

#### 5.2.3.1.1 Setting Up Putaway Preference for a Pallet

To set up putaway preference for a pallet:

1. In the Container with Unknown Contents tab of Putaway Preferences window, choose the Pallet tab. The Pallet tab window is displayed.
2. In the Pallet tab window, choose .

3. The Putaway Preference Details window appears.
4. Enter information in the applicable fields. Refer [Table 5–8](#) for field value descriptions.
5. Choose .



Putaway Preference Details ( DEFAULT / MA03 ) : Container with unknown contents : Pallet

Activity Group: Receipt To View Strategy Click here

Description:

Activity Code:


**Zone Priorities**

	Priority	Zone	Storage Code
	2	ZZ1	To store DVD Writers
	3	Bulk	To store DVD Writers
*			

Results 2 Of 2

Activity Search ( DEFAULT ) Putaway Preferences ( DEFAULT / MA03 ) Putaway Preference Details ( DEFAULT / ...

**Table 5–8 Putaway Preference Details Window - Container with Unknown Contents Pallet Tab**


Field	Description
Activity Group	This is automatically populated by the system as 'RECEIPT'.
To View Strategy Click here	<p>Choose  to view or set up Putaway Strategy. For more details about Setting Up Putaway Strategy, see <a href="#">Setting Up Putaway Strategy for Containers with Unknown Contents - Pallets</a>.</p> <p>Note: Putaway strategy may be specified for the putaway preferences after the preference is saved.</p>
Description	Enter a description for the activity constraint.
Activity Code	Choose the Activity Code for the putaway preference. This is a mandatory field.
<b>Zone Priorities</b>	
Priority	<p>Enter a number to represent the priority.</p> <p>The priority is used to sequence the order in which the zone priorities are evaluated. For example, all storage code level priorities are to be evaluated first before generic priorities.</p> <p>The priority needs to be a positive integer, greater than zero. This is mandatory.</p>
Zone	Choose the relevant zone for putaway. This is a mandatory field.
Storage Code	<p>Choose the storage code for the zone, if applicable.</p> <p>This limits the locations being evaluated to the storage code specified. For example, putaway of hazardous items into a zone are restricted to the locations having the appropriate storage code.</p>

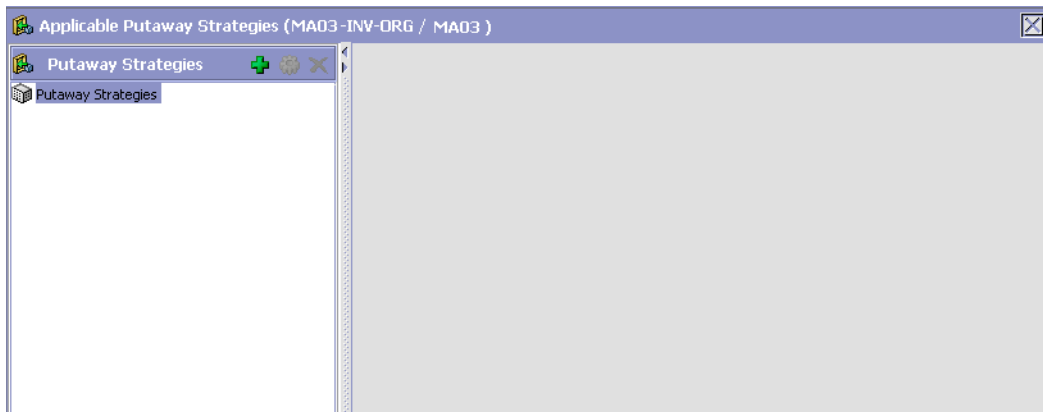
For example, pre-received pallets, when putaway is automatically sorted by shipment, SCAC utilizing the above fields.



### Setting Up Putaway Strategy for Containers with Unknown Contents - Pallets

You can set up putaway strategies to putaway applicable inventory from a source zone to a target zone, based on the strategy specified.

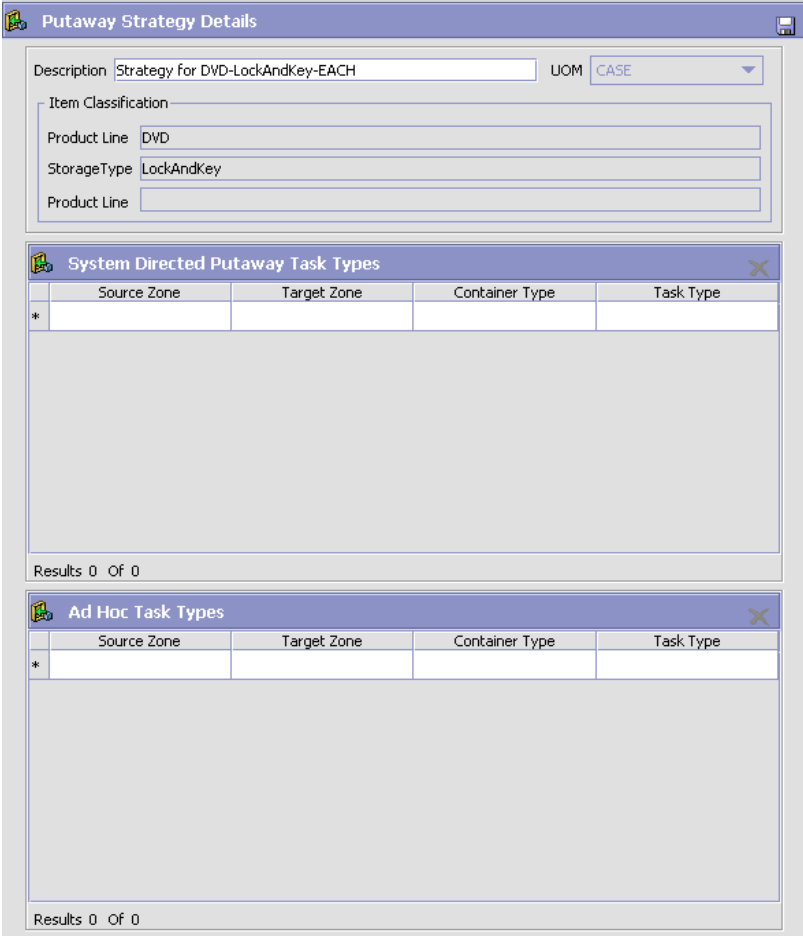
To set up putaway strategy for container with unknown content pallets:

1. In the Putaway Preference Details : Container with unknown contents : Pallet window, choose .
2. The Applicable Putaway Strategies window is displayed.



3. Choose  in the Putaway Strategies panel. The Putaway Strategy Details window appears in the right panel.
4. Enter information in the applicable fields. See the Putaway Strategy Details Window table for field value descriptions.
5. Choose .





**Putaway Strategy Details**

Description: Strategy for DVD-LockAndKey-EACH UOM: CASE

Item Classification

Product Line: DVD

StorageType: LockAndKey

Product Line:

**System Directed Putaway Task Types**

	Source Zone	Target Zone	Container Type	Task Type
*				

Results 0 Of 0

**Ad Hoc Task Types**




	Source Zone	Target Zone	Container Type	Task Type
*				

Results 0 Of 0

**Table 5–9 Putaway Strategy Details Window**

Field	Description
Description	Enter a description for the Putaway Strategy.
UOM	Select the UOM for the Putaway Strategy, if applicable. Note: The UOM will be defaulted in instances where it has been specified in the Putaway Preference Details screen.

**Table 5–9 Putaway Strategy Details Window**

Field	Description
<b>Item Classification</b>	List of putaway item classifications for the Enterprise are displayed. An example, Product Line is shown below.
Product Line	Choose relevant product line item classification for the putaway activity.  Choose  . In the Classification Values window, select the applicable product line classification.
<b>System Directed Putaway Task Types</b>	<b>Displays the list of existing system directed putaway task types.</b>  <b>You may use  to delete an existing system directed putaway task type.</b>
Source Zone	Select the source zone where inventory is available.
Target Zone	Select the target zone where you want to move the inventory.
Container Type	Select the container type to be used to move the inventory from the source zone to the target zone. Typical values are Case and Pallet.
Task Type	Select the Putaway Task Type applicable to this putaway strategy. This field displays the list of existing system directed task types that belong to the 'PUTAWAY' activity group.
<b>Ad hoc Task Types</b>	<b>Displays the list of existing ad hoc task types.</b>  <b>You may use  to delete an existing ad hoc task type.</b>
Source Zone	Select the source zone where inventory is available.
Target Zone	Select the target zone where you want to move the inventory.

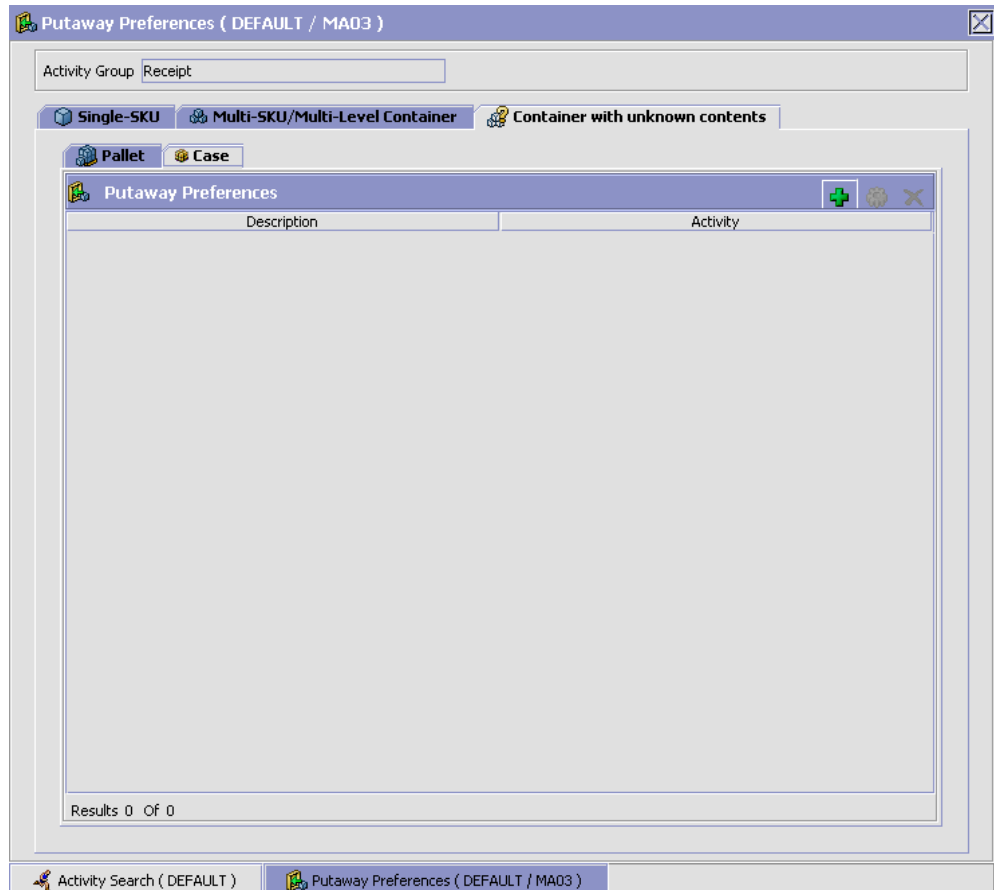
**Table 5–9 Putaway Strategy Details Window**



Field	Description
Container Type	Select the container type to be used to move the inventory from the source zone to the target zone. Typical values are Case and Pallet.
Task Type	Select the Putaway Task Type applicable to this putaway strategy. This field displays the list of existing ad hoc task types that belong to the 'PUTAWAY' activity group.

#### 5.2.3.1.2 Setting Up Putaway Preference for a Case

To set up putaway preference for a case:

1. In the Container with Unknown Contents tab of Putaway Preferences window, choose the Case tab. The Case tab window is displayed.



2. In the Case tab window, choose .
3. The Putaway Preference Details window appears.
4. Enter information in the applicable fields. Refer [Table 5–10](#) for field value descriptions.
5. Choose .

**Putaway Preference Details ( DEFAULT / MA03 ) : Container with unknown contents : Case**

Activity Group:  To View Strategy Click here

Description:

Activity Code:


**Zone Priorities**

	Priority	Zone	Storage Code
	1	Bulk	To store DVD Writers
*			

Results 1 Of 1

Activity Search ( DEFAULT )   Putaway Preferences ( DEFAULT / M...   Putaway Preference Details ( DEFAU...


**Table 5–10 Putaway Preference Details Window - Container with Unknown Contents Case Tab**

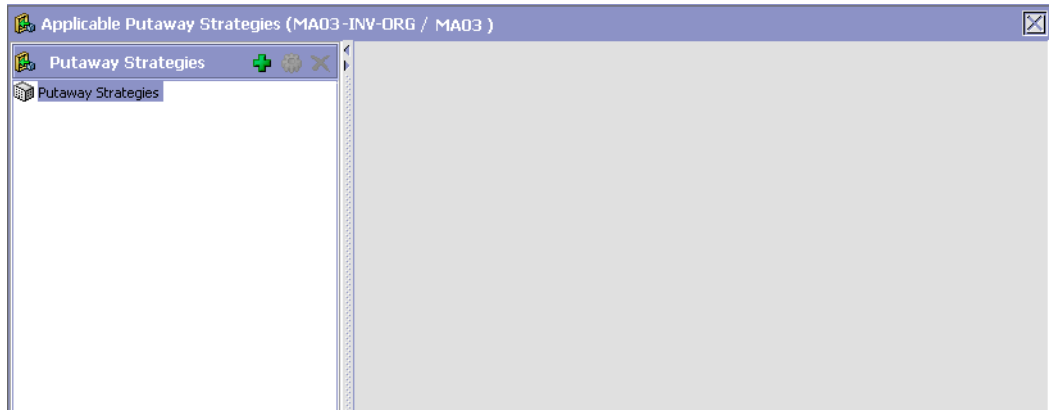
Field	Description
Activity Group	This is automatically populated by the system as 'RECEIPT'.
To View Strategy Click here	<p>Choose  to view or set up Putaway Strategy. For more details about Setting Up Putaway Strategy, see <a href="#">Setting Up Putaway Strategy for Containers with Unknown Contents - Cases</a>.</p> <p>Note: Putaway strategy may be specified for the putaway preferences after the preference is saved.</p>
Description	Enter a description for the activity constraint.
Activity Code	Choose the Activity Code for the putaway preference. This is a mandatory field.
<b>Zone Priorities</b>	
Priority	<p>Enter a number to represent the priority.</p> <p>The priority is used to sequence the order in which the zone priorities are evaluated. For example, all storage code level priorities are to be evaluated first before generic priorities.</p> <p>The priority needs to be a positive integer, greater than zero. This is mandatory.</p>
Zone	Choose the relevant zone for putaway. This is a mandatory field.
Storage Code	<p>Choose the storage code for the zone, if applicable.</p> <p>This limits the locations being evaluated to the storage code specified. For example, putaway of hazardous items into a zone are restricted to the locations having the appropriate storage code.</p>



### Setting Up Putaway Strategy for Containers with Unknown Contents - Cases

You can set up putaway strategies to putaway applicable inventory from a source zone to a target zone, based on the strategy specified.

To set up putaway strategy for container with unknown content cases:

1. In the Putaway Preference Details : Container with unknown contents : Case window, choose .
2. The Applicable Putaway Strategies window is displayed.



3. Choose  in the Putaway Strategies panel. The Putaway Strategy Details window appears in the right panel.
4. Enter information in the applicable fields. See the Putaway Strategy Details Window table for field value descriptions.
5. Choose .

Putaway Strategy Details

DescriptionStrategy for DVD-LockAndKey-EACHUOMCASE

Item Classification

Product LineDVD

StorageTypeLockAndKey

Product Line

System Directed Putaway Task Types

	Source Zone	Target Zone	Container Type	Task Type
*				

Results 0 Of 0

Ad Hoc Task Types

	Source Zone	Target Zone	Container Type	Task Type
*				




Results 0 Of 0

Table 5–11 Putaway Strategy Details Window

Field	Description
Description	Enter a description for the Putaway Strategy.
UOM	Select the UOM for the Putaway Strategy, if applicable. Note: The UOM will be defaulted in instances where it has been specified in the Putaway Preference Details screen.






**Table 5–11 Putaway Strategy Details Window**

Field	Description
<b>Item Classification</b>	List of putaway item classifications for the Enterprise are displayed. An example, Product Line is shown below.
Product Line	<p>Choose relevant product line item classification for the putaway activity.</p> <p>Choose . In the Classification Values window, select the applicable product line classification.</p>
<b>System Directed Putaway Task Types</b>	<p><b>Displays the list of existing system directed putaway task types.</b></p> <p><b>You may use  to delete an existing system directed putaway task type.</b></p>
Source Zone	Select the source zone where inventory is available.
Target Zone	Select the target zone where you want to move the inventory.
Container Type	Select the container type to be used to move the inventory from the source zone to the target zone. Typical values are Case and Pallet.
Task Type	Select the Putaway Task Type applicable to this putaway strategy. This field displays the list of existing system directed task types that belong to the 'PUTAWAY' activity group.
<b>Ad hoc Task Types</b>	<p><b>Displays the list of existing ad hoc task types.</b></p> <p><b>You may use  to delete an existing ad hoc task type.</b></p>
Source Zone	Select the source zone where inventory is available.
Target Zone	Select the target zone where you want to move the inventory.
Container Type	Select the container type to be used to move the inventory from the source zone to the target zone. Typical values are Case and Pallet.
Task Type	Select the Putaway Task Type applicable to this putaway strategy. This field displays the list of existing ad hoc task types that belong to the 'PUTAWAY' activity group.

### 5.2.3.2 Creating a New Putaway Preference for Container with Unknown Contents from an Existing Putaway Preference

To create a new putaway preference for container with unknown contents from an existing putaway preference:


1. From the tree in the application rules side panel, choose Receiving > Putaway Preferences. The Putaway Preferences window is displayed.
2. Alternatively, choose  in the Activity Search window to access Putaway Preferences window.
3. In the Putaway Preferences window, choose the Container with Unknown Contents tab.
4. The Container with Unknown Contents tab window is displayed, with the list of putaway preferences.
5. Select the putaway preference to be copied. Choose .
6. The Putaway Preference Details window is displayed.
7. Enter information in the applicable fields. For more information about modifying the fields, refer to [Section 5.2.3.1.1, "Setting Up Putaway Preference for a Pallet"](#) on page 305 and [Section 5.2.3.1.2, "Setting Up Putaway Preference for a Case"](#) on page 311.
8. Choose .



*The activity code corresponding to the preference cannot be modified.  
The preference must be deleted and recreated.*

### 5.2.3.3 Modifying a Putaway Preference for Container with Unknown Contents

Once a Putaway Preference for Container with Unknown Contents has been created, it can be modified.

To modify a putaway preference for container with unknown contents :



1. From the tree in the application rules side panel, choose Receiving > Putaway Preferences. The Putaway Preferences window is displayed.
2. Alternatively, choose  in the Activity Search window to access Putaway Preferences window.
3. In the Putaway Preferences window, choose the Container with Unknown Contents tab.

4. The Container with Unknown Contents tab window is displayed, with the list of putaway preferences.
5. Select the putaway preference to be modified. Choose .
6. The Putaway Preference Details window is displayed.
7. Enter information in the applicable fields. For more information about modifying the fields, refer to [Section 5.2.3.1.1, "Setting Up Putaway Preference for a Pallet"](#) on page 305 and [Section 5.2.3.1.2, "Setting Up Putaway Preference for a Case"](#) on page 311.
8. Choose .

*The activity code corresponding to the preference cannot be modified. The preference must be deleted and recreated.*

#### 5.2.3.4 Deleting a Putaway Preference for Container with Unknown Contents

To delete a putaway preference for container with unknown contents :

1. From the tree in the application rules side panel, choose Receiving > Putaway Preferences. The Putaway Preferences window is displayed.
2. Alternatively, choose  in the Activity Search window to access Putaway Preferences window.
3. In the Putaway Preferences window, choose the Container with Unknown Contents tab.
4. The Container with Unknown Contents tab window is displayed, with the list of putaway preferences.
5. Select the putaway preference to be deleted.
6. Choose .

## 5.3 Defining Purchase Order

A purchase order consists of a list of items to be purchased from a vendor. The vendor may ship a purchase order in multiple shipments. Also, a shipment may consist of multiple purchase orders from the same vendor.

The ability to configure receiving processes for a purchase order in the warehouse is detailed here.

Use Purchase Order set-up for:

- [Defining Receipt Modification Rules](#)
- [Defining Receipt Process Type Details](#)
- [Defining Receipt Process Model](#)
- [Defining Receiving Preferences](#)
- [Defining Receiving Disposition](#)
- [Defining Disposition Codes](#)

### 5.3.1 Defining Receipt Modification Rules

Most order document types flow through a pipeline without requiring any intervention by a customer service representative. However, there are times when modifications are required, such as changing credit card information or quantity. Yantra 7x supports modifications through the Yantra 7x Application Consoles and APIs. It is critical for you to decide which modifications are allowed for each modification type, modification level, and status combination.

---

**Important:** Contemplate business and system integration implications before allowing a modification that is disallowed as part of the system defaults. For example, adding instructions to a purchase order document type is disallowed after the release has been sent to the node.




---

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

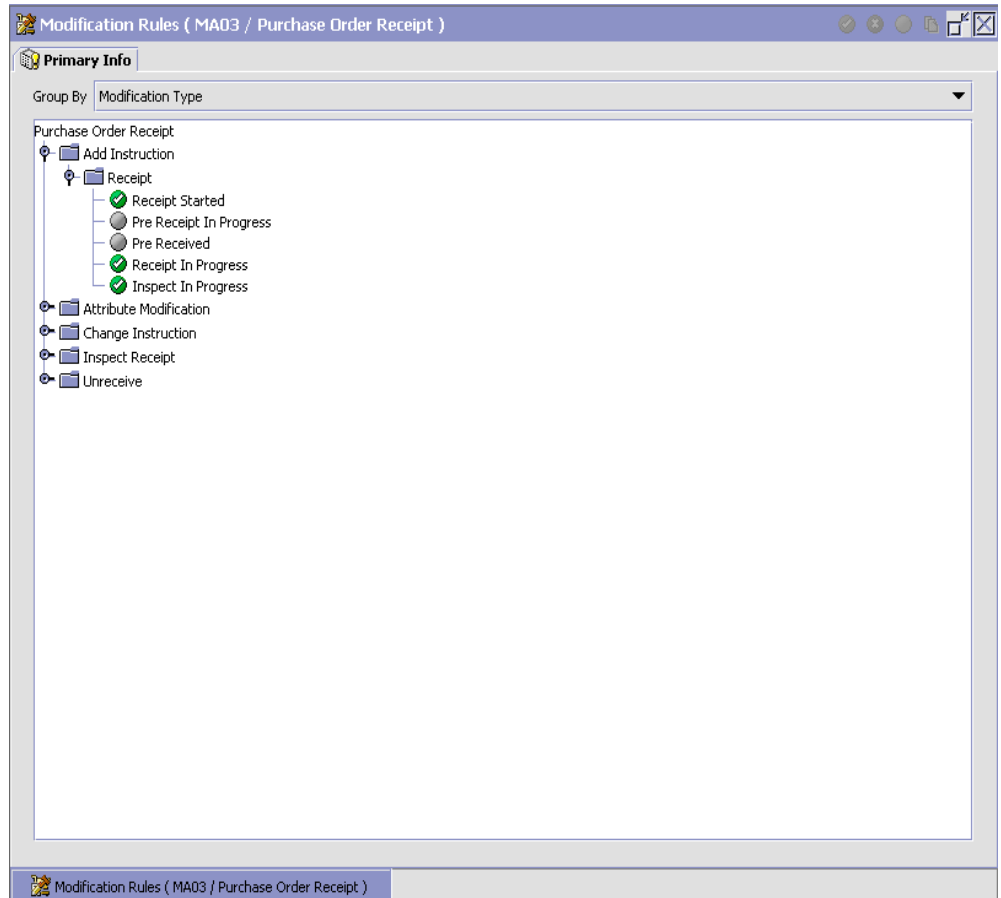
### 5.3.2 Setting Up Receipt Modification Rules

To set up receipt modification rules:

1. From the tree in the application rules side panel, choose Receiving > Document Specific > Purchase Order > Receipt Modification Rules. The Modification Rules window is displayed.
2. In the Modification Rules window, select the Purchase Order Receipt whose Modification Rule is to be set. Refer [Table 5–12](#) for field value descriptions.

3. Choose  to allow order modification.
4. Choose  to disallow order modification.
5. Choose  to ignore order modification.

For more information about defining modification rules, see *Yantra 7x Distributed Order Management Configuration Guide*.



**Table 5–12 Modification Rules Window**

Field	Description
<b>Primary Info</b>	
Group by	View the Purchase Order Receipt Modification Rules grouped by Modification Type, Modification Level, or by Status.
Modification Type	<b>Purchase Order Receipt Modification Rules grouped by Modification Type. Statuses are displayed grouped by Modification Level for each Modification Type.</b>
Add Instruction	Allow or Disallow or Ignore addition of instruction appropriately.
Attribute Modification	Allow or Disallow or Ignore modifications to an attribute appropriately.
Change Instruction	Allow or Disallow or Ignore change of instruction appropriately.
Receipt Complete	Allow or Disallow or Ignore completion of a receipt appropriately.
Unreceive	Allow or Disallow or Ignore un-receiving of a return order appropriately.
Modification Level	<b>Purchase Order Receipt Modification Rules grouped by Modification Level. Statuses are displayed grouped by Modification Type for each Modification Level.</b>
Receipt	Allow or Disallow or Ignore modification types at receipt level appropriately.
Receipt Line	Allow or Disallow or Ignore modification types at receipt line level appropriately.
Status	<b>Purchase Order Receipt Modification Rules grouped by Status. Modification Types are displayed grouped by Modification Level for each Status.</b>  For more information about group by status, see <a href="#">Section 5.3.4.6, "Statuses"</a> on page 332.

For more information about defining or changing Modification Rules, see *Yantra 7x Distributed Order Management Configuration Guide*.

### 5.3.3 Defining Receipt Process Type Details

Receipt Process Type Details define parameters and templates that distinguish a process type.

A **process type pipeline** is a series of transactions and statuses that guide document types, such as a Return Order, through a predefined process. A pipeline consists of the different statuses a document goes through during fulfillment, negotiation, shipment, or receipt. You can also set up transactions consisting of events, actions, and conditions, as they pertain to the pipeline you are configuring.

#### Repositories

A repository is a logical collection of entities that define the business process workflow.

The following entities are included in a repository:


- Pipelines
- Transactions
- Statuses
- Conditions
- Actions
- Services

Yantra 7x provides a base repository for each of the system defined process types. Some of the entities within a repository are copied when creating a new document type. For more information about creating a new document type, see the *Yantra 7x Platform Configuration Guide*.

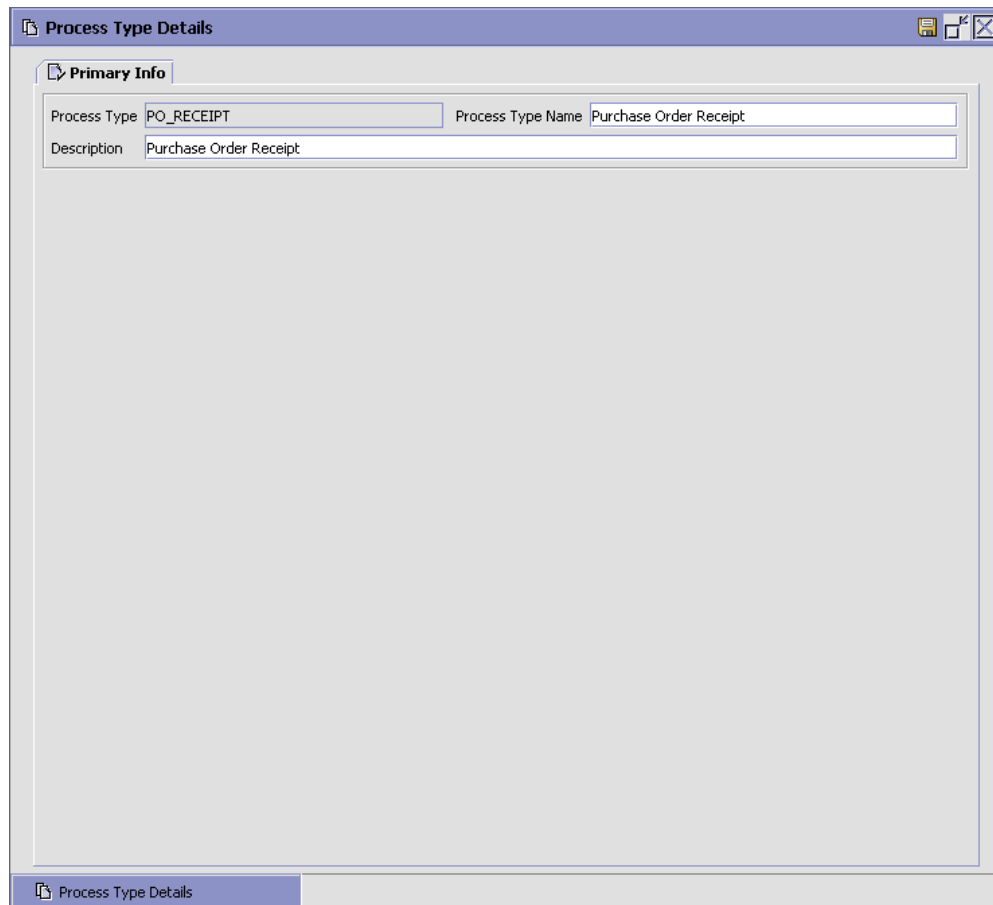
For more information about defining process type details, see *Yantra 7x Platform Configuration Guide*.

To view purchase order receipt process type details:

1. From the tree in the application rules side panel, choose Receiving > Document Specific > Purchase Order > Receipt Process Type Details. The Process Type Details : Purchase Order window is displayed.

2. Primary information of the Process Type is displayed in the applicable fields. Refer [Table 5–13](#) for field value descriptions.
3. Choose .

For more information about defining the primary information for process type details, see *Yantra 7x Platform Configuration Guide*.



The screenshot shows a software window titled "Process Type Details". Inside, there is a tab labeled "Primary Info". Below the tab, there are three input fields: "Process Type" with the value "PO\_RECEIPT", "Process Type Name" with the value "Purchase Order Receipt", and "Description" with the value "Purchase Order Receipt". The window has a standard Windows-style title bar with minimize, maximize, and close buttons. At the bottom, there is a status bar with the text "Process Type Details".



**Table 5–13 Process Type Details Window**

Field	Description
<b>Primary Info</b>	
Process Type	This is populated by the system, and reads "PO_RECEIPT".
Process Type Name	Enter a name for the process type.
Description	Enter a brief description for the process type.

### 5.3.4 Defining Receipt Process Model

The process of receiving is modeled through a pipeline. This represents the process configuration that is unique to a warehouse. A warehouse may also specify unique processes for each participating enterprise.

For example, a warehouse that performs re-packaging (VAS) for certain items in the warehouse or a warehouse that always palletizes all receipts before putaway to storage area.

#### 5.3.4.1 Pipeline Determination

**Pipeline determination** is used to set up conditions that affect which pipeline is used during the start of the business process workflow. For example, an organization deals with sales orders that sometimes contain hazardous materials. They have two separate pipelines, one in which orders with order lines without any hazardous materials go through and one in which orders with order lines containing hazardous materials must go through for inspection before continuing through the order process. The organization uses pipeline determination to set up a condition that determines whether or not order lines contain hazardous materials and sends the order line down the correct pipeline.

For more information about Pipeline Determination, see *Yantra 7x Platform Configuration Guide*.

#### 5.3.4.2 Hub Rule

When you expand the Pipeline Determination branch, the components displayed depends on what role you are logged in as. If you are logged in as a Hub role, the Hub Rule is displayed. If you are logged in as an Enterprise role, both the Hub Rule and all user created determination

rules (For example, My Rule) components are displayed. Double-click on the applicable rule to display the pipeline determination rules.

---

---

**Note:** If you are logged in as an Enterprise role, the Hub Rule screen is grayed out and cannot be modified.

---

---

Drag conditions and pipelines into the work area to construct pipeline determination rules. A single pipeline or condition must be the root. Conditions cannot link back to an earlier component in the chain and a pipeline cannot be linked to twice.

---

---

**Note:** When configuring pipeline determination for an order document type pipeline, please note that pipeline determination is only considered when adding a line or creating an order. When changes are made to draft orders pipeline determination does not occur.

---

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### 5.3.4.3 Condition Variables for Pipeline Determination

When using conditions for pipeline determination, the following condition variables can be used:

- Document Type
- Enterprise Code
- Seller Organization Code
- Ship Node
- Buyer Organization Code
- Receiving Node
- Receiving Node Interface Type
- Ship Mode
- Freight Terms
- Carrier Type
- Is Hazardous Material
- Is Inspection Pending

- Is Receiving Node Integrated Real Time

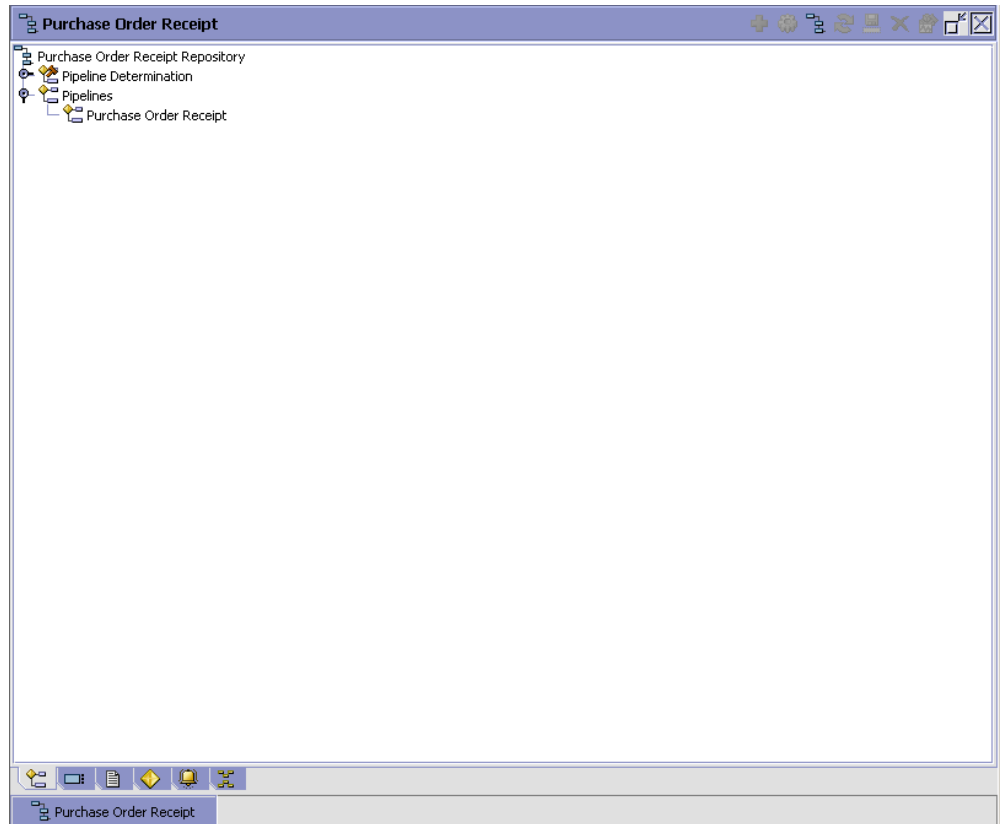
For more information about Pipeline Determination and Hub Rule, see *Yantra 7x Platform Configuration Guide*.

#### 5.3.4.4 Pipelines

For more information about Pipelines, see *Yantra 7x Platform Configuration Guide*.

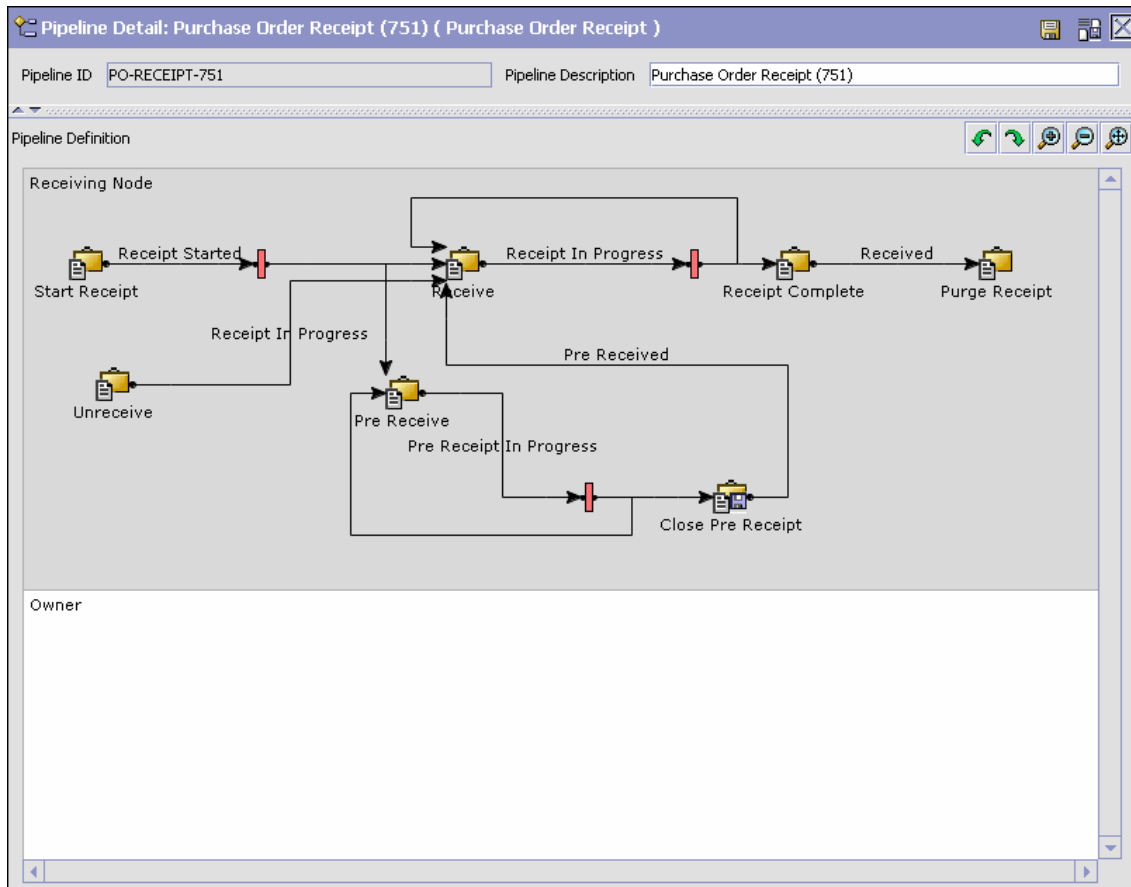
To view the purchase order receipt pipeline details:

1. From the tree in the application rules side panel, choose Receiving > Document Specific > Purchase Order > Receipt Process Model. The Purchase Order Receipt window is displayed.



2. In the Purchase Order Receipt window, choose Purchase Order Receipt Repository > Pipelines > Purchase Order Receipt.
3. The Pipeline Detail: Purchase Order Receipt (Purchase Order Receipt) window is displayed.

For more information about creating and modifying a pipeline, see the *Yantra 7x Platform Configuration Guide*.




### 5.3.4.5 Transactions

Every process type has a set of base transactions defined for it. A transaction is a logical unit of work that is necessary for performing

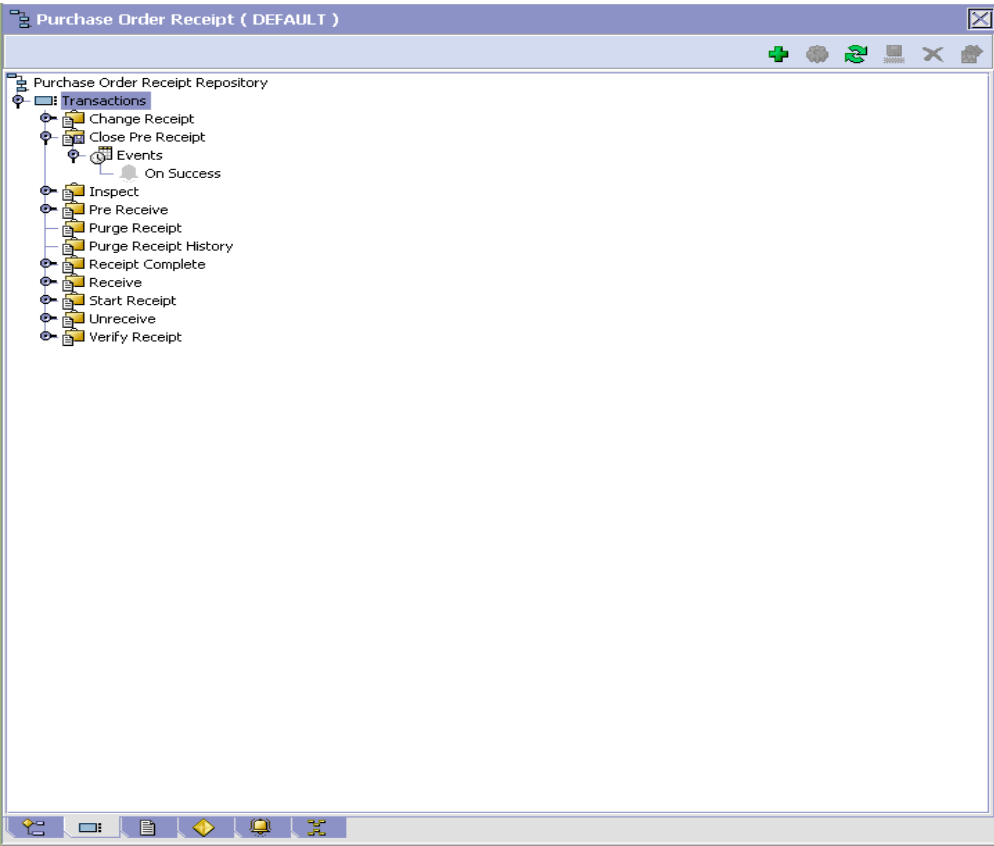
activity within Yantra 7x. Base transactions are predefined transactions that contain information about how the transaction behaves, such as how many copies of a transaction can be kept in a process type and whether or not it can have configurable base pick and drop statuses. Base transactions can be used to create new transactions. These transactions can be changed within the limits defined in the base transaction.

For more information about Transactions, see *Yantra 7x Platform Configuration Guide*.

To view the transaction details for a purchase order receipt pipeline:

1. From the tree in the application rules side panel, choose Receiving > Document Specific > Purchase Order > Receipt Process Model. The Purchase Order Receipt window is displayed.
2. In the Purchase Order Receipt window, choose .
3. The Transactions tab window is displayed.

For more information about creating and modifying Transactions, see *Yantra 7x Platform Configuration Guide*.



**Table 5–14 Purchase Order Receipt Pipeline - Transactions Tab Window**

Field	Description
Change Receipt	This transaction represents the receipt details being modified after a receipt for a shipment is recorded.
Close Pre Receipt	<p>This transaction represents the closure of pre-receipts for a shipment.</p> <p>Pre-receipt allows a warehouse to indicate the receipt of containers for a shipment. The visibility provided to the other departments allows for exception handling. For example, during item shortage in the pick areas, supervisors monitor incoming shipments to request for emergency receipt of a particular shipment.</p>
Inspect	This transaction represents the step of inspecting a shipment. This is required to complete the disposition of product received.
Pre Receive	This transaction represents a shipment that may be pre-received before it is actually received in the warehouse.
Purge Receipt	<p>This transaction represents a receipt that may be purged (moved out of) from primary transactional tables to the history tables.</p> <p>For more information about purge criteria, see <a href="#">Section 12.8, "Defining Purge Criteria"</a> on page 930.</p>
Purge Receipt History	<p>This transaction represents a receipt that may now be purged (moved out of) from the history tables.</p> <p>For more information about purge criteria, see <a href="#">Section 12.8, "Defining Purge Criteria"</a> on page 930.</p>
Receipt Complete	This transaction represents the completion of receipt of a shipment. It is invoked automatically from receipt screens or manually from a console or through the close receipt agent.
Receive	This transaction represents receipt of product on a shipment.
Start Receipt	This transaction represents the opening of a receipt for shipment. This is invoked either manually from a console or automatically invoked from consoles or RF.

**Table 5–14 Purchase Order Receipt Pipeline - Transactions Tab Window**


Field	Description
Unreceive	This transaction represents the removal of excess container, if any, of received quantity against a shipment.
Verify Receipt	This transaction checks whether an under or over receipt discrepancy is found in the received inventory, and raises an ON_SUCCESS event.

#### 5.3.4.6 Statuses

**Statuses** are the actual states that a document moves through in the pipeline. A transaction can contain two types of statuses, a drop status and a pickup status. A document is moved into a **drop status** when the events and conditions of a transaction have been completed. A **pickup status** takes the document from the previous drop status and moves it through the next transaction. Created and Scheduled are examples of statuses.

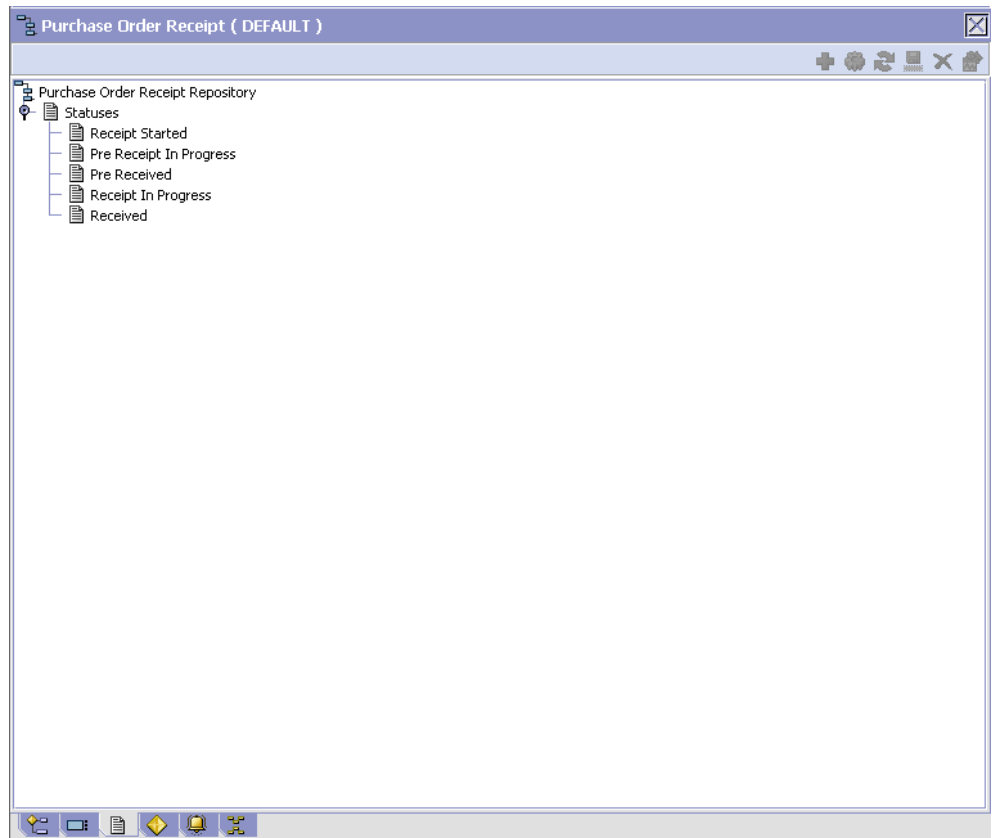
For more information about Statuses, see *Yantra 7x Platform Configuration Guide*.

To view the status details of a purchase order receipt pipeline:

1. From the tree in the application rules side panel, choose Receiving > Document Specific > Purchase Order > Receipt Process Model. The Purchase Order Receipt window is displayed.
2. In the Purchase Order Receipt window, choose .
3. The Statuses tab window is displayed.

For more information about creating and modifying Statuses, see *Yantra 7x Platform Configuration Guide*.





**Table 5–15 Purchase Order Receipt Pipeline - Statuses Tab Window**

Field	Description
Receipt Started	This indicates that the receipt is opened to receive the shipment. This corresponds to 'Start Receipt' transaction.
Pre Receipt In Progress	This indicates that pre-receipt for the shipment is in progress. This corresponds to 'Pre-receive' transaction.

**Table 5–15 Purchase Order Receipt Pipeline - Statuses Tab Window**


Field	Description
Pre Received	This indicates that pre-receipt process for the shipment is completed. This corresponds to 'Close Pre-receipt' transaction.
Receipt In Progress	This indicates that receiving for the shipment is in progress. This corresponds to 'Receive' or 'Un-Receive' transactions.
Received	This indicates that receiving for the shipment is complete. This corresponds to 'Receipt Complete' transaction.

### 5.3.4.7 Conditions

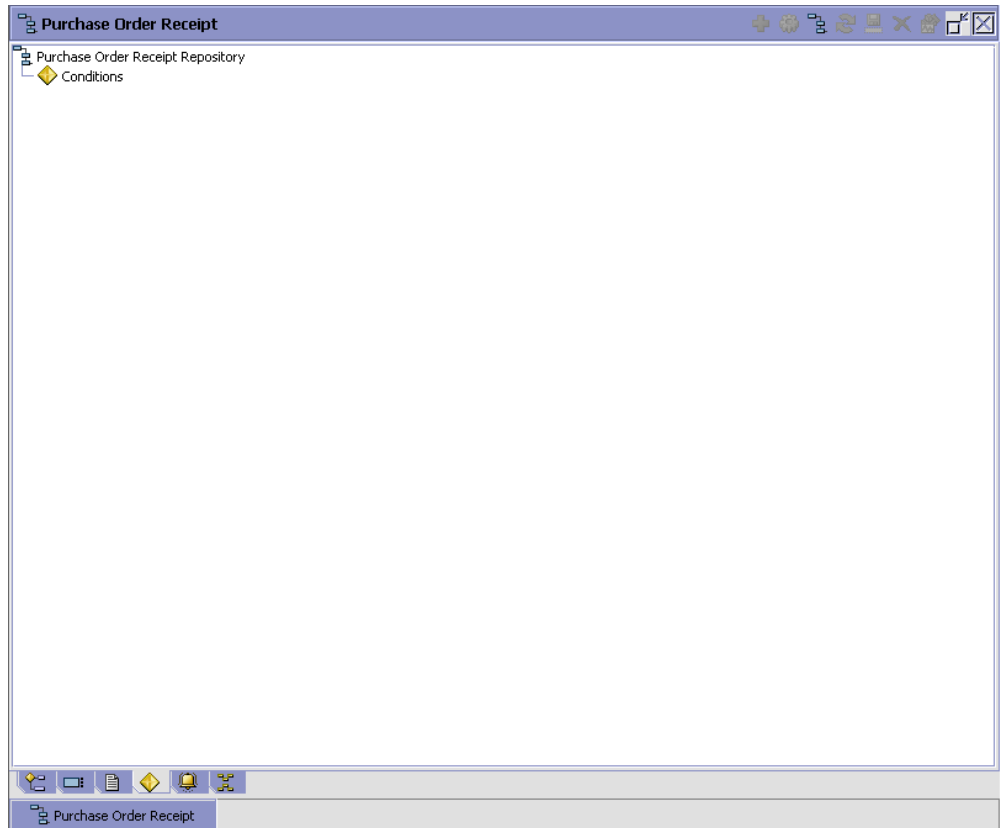
A **condition** matches document type attributes against decision points and routes the documents to different paths based on the specified attribute and value combinations. The document type attributes against which conditions can be created are predefined in Yantra 7x. You can use these attributes in any combination or you can create conditions that execute the appropriate application logic for specific circumstances.

For more information about Conditions, see *Yantra 7x Platform Configuration Guide*.

To view the condition details of a purchase order receipt pipeline:

1. From the tree in the application rules side panel, choose Receiving > Document Specific > Purchase Order > Receipt Process Model. The Purchase Order Receipt window is displayed.
2. In the Purchase Order Receipt window, choose .
3. The Conditions tab window is displayed.

For more information about creating and modifying Conditions, see *Yantra 7x Platform Configuration Guide*.



**Table 5–16** *Purchase Order Receipt Pipeline - Conditions Tab Window*

Field	Description
Conditions	Displays conditions that are specific to the purchase order receipt pipeline, if any.

Yantra 7x WMS default pipeline does not have any conditions specified.


### 5.3.4.8 Actions

An **action** is a process or program that is triggered by an event. These processes and programs send user alert notifications and automatically resolve issues.

For example, when an order is released (the event), you can set an action to send the customer an e-mail.

For more information about Actions, see *Yantra 7x Platform Configuration Guide*.

To view the action details of a purchase order receipt pipeline:

1. From the tree in the application rules side panel, choose Receiving > Document Specific > Purchase Order > Receipt Process Model. The Purchase Order Receipt window is displayed.
2. In the Purchase Order Receipt window, choose .
3. The Actions tab window is displayed.

For more information about viewing the action details, see [Section 3.12.3, "Actions"](#).

For more information about creating and modifying Actions, see *Yantra 7x Platform Configuration Guide*.

**Note:** Yantra provides these actions only for DEFAULT enterprises.


### 5.3.4.9 Service Definitions

Service definitions are a representation of the logic that regulates document workflow services. The Service Builder is a graphical interface that enables you to create a graphical representation of these *services*.

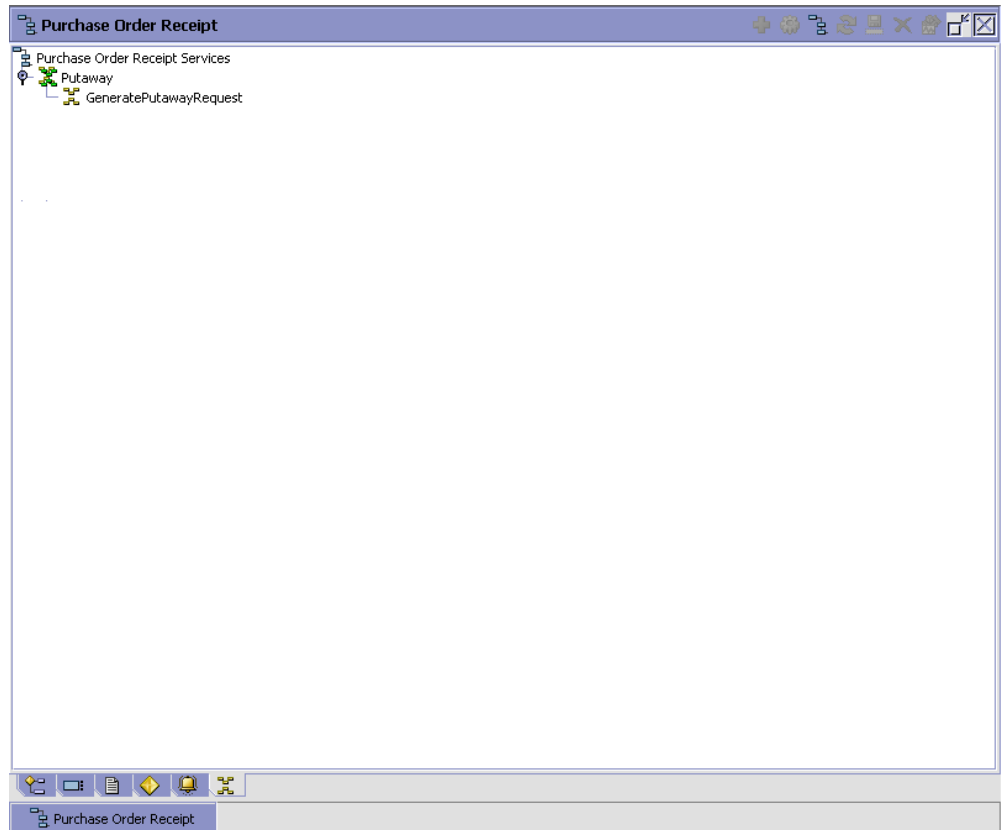
For more information about Service Definitions, see *Yantra 7x Platform Configuration Guide*.

To view the service definition details of a purchase order receipt pipeline:

1. From the tree in the application rules side panel, choose Receiving > Document Specific > Purchase Order > Receipt Process Model. The Purchase Order Receipt window is displayed.

2. In the Purchase Order Receipt window, choose .
3. The Service Definitions tab window is displayed.

For more information about creating and modifying Service Definitions, see *Yantra 7x Platform Configuration Guide*.



**Table 5–17 Purchase Order Receipt Pipeline - Service Definition Tab Window**

Field	Description
Default Group	Displays flows that are specific to the returns receipt pipeline.

Yantra 7x WMS default pipeline does not have any conditions specified.

### 5.3.5 Defining Receiving Preferences

The receiving preference configuration manages the receiving process of a warehouse.


A receiving preference identifies the characteristics of inbound shipments and provides guidelines to the execution transactions.

Use Receiving Preferences for:

- [Creating a Receiving Preference](#)
- [Modifying a Receiving Preference](#)

#### 5.3.5.1 Creating a Receiving Preference

To create a receiving preference:

1. From the tree in the application rules side panel, choose Receiving > Document Specific > Purchase Order > Receiving Preferences.
2. The Receiving Preferences : Purchase Order window is displayed.
3. Enter information in the applicable fields. Refer [Table 5–18](#) for field value descriptions.
4. Choose .

**Receiving Preferences : Purchase Order ( DEFAULT / MA03 )**

☐ Shipment entry allowed

---

**Build Pallet:**

☒ Always      ☐ Optional

☐ If Item Tag or Serial tracked

**Build Case:**

☒ Always      ☐ Optional

☐ If Item Tag or Serial tracked

---

**Disposition Code Details:**

Disposition Code for Receipt with QC:

Disposition Code for Receipt without QC:

**Receiving unexpected Items:**

☐ Allow receiving unexpected Items on Shipment

---

**Preference for receipt closure by agent:**

☒ Unconditionally      ☐ Received quantity at least equal to expected quantity      ☐ After Putaway completion

---

Receiving Preferences : Purchase Order ( DEFAULT )					
Vendor	Vendor Classification	Item ID	Receiving Item Classification	Force Case Content entry	Requires QC

Results 0 Of 0

**Table 5–18 Receiving Preferences : Purchase Order Window**

Field	Description
Shipment Entry Allowed	<p>Select if shipment entry is to be created when a particular shipment is not available on the system.</p> <p>"Allow Shipment Entry" enables the system to automatically create a shipment entry in the system, if a shipment entry does not exist when a "Start Receipt" operation is performed.</p> <p>On creation and confirmation of the shipment, the "Include in Receipt" transaction is executed, to enable the receiving process to be carried out on this receipt.</p> <p>Warehouses that receive shipment information via fax or email can manually enter the information into the system. This allows for enhanced tracking and visibility.</p>
<b>Build Pallet</b>	
Always	Select if building of a pallet is mandatory during the receipt process.
Optional	Select if building of a pallet is optional.
If Item Tag or Serial Tracked	Select if building of pallet is required for items that are tag or serial tracked.
<b>Build Case</b>	
Always	Select if building of case is mandatory during the receipt process.
Optional	Select if building of case is optional.
If Item Tag or Serial tracked	Select if building of case is required for items that are tag or serial tracked.
<b>Disposition Code Details</b>	
Disposition Code for Receipt with QC	Choose the disposition code to associate with receipts for vendors or shipments that require QC.
Disposition Code for Receipt without QC	Choose the disposition code to associate with receipts for vendors or shipment that do not require QC.
<b>Receiving unexpected Items</b>	



**Table 5–18 Receiving Preferences : Purchase Order Window**

Field	Description
Allow receiving unexpected Items on Shipment	Select to allow receiving of unexpected items on the shipment.
<b>Preference for Receipt Closure by Agent</b>	
Unconditionally	Select if receipt closure by the agent occurs every time the closure agent is run.  This is typically used where receipts are closed as end-of-day process.
Received quantity at least equal to expected quantity	Select if receipt closure by the agent occurs when the received quantity is at least equal to the expected quantity.
After Putaway Completion	Select if receipt closure by the agent occurs after putaway is completed.  This applies to warehouses that indicate availability only when inventory is putaway to their storage locations.
<b>Vendor Preferences</b>	Populated automatically from vendor preferences in Yantra 7x Supply Collaboration.  The preferences are evaluated to determine the best preference. The preference with most matches to the order details is determined as the best preference.  For more information about Defining Customer Classifications, see <i>Yantra 7x Supply Collaboration Configuration Guide</i> .
Vendor	This indicates the vendor.  A vendor is defined as an external company that supplies materials that you order. You receive materials from your vendors. You are, in turn, vendors to your customers.
Vendor Classification	This indicates classification of the vendor.
Item ID	This indicates item ID.
Receiving Item Classification	This indicates the custom defined item storage definition.
Force Case Content entry	This indicates whether case content entry during receipt must be forced.
Requires QC	This indicates whether QC is required or not.

The closure of a shipment triggers the upload of receipt information to external HOST systems or updated in Yantra Supply Chain Synchronization. For example, inventory availability for the shipment is moved from an in-transit to on-hand.

Vendor specific preferences, if any, configured as part of the Yantra 7x Supply Collaboration are displayed here. For more information, see *Yantra 7x Supply Collaboration Configuration Guide*.


Preferences for receiving a shipment are specified as a receiving preference for the ship node and enterprise level. A supervisor, may choose to override these preferences for a specific vendor. For example, a ship node requiring case content verification for most vendors. For a particular vendor a supervisor can override this requirement while manually creating shipment.

The feature of override is only relevant when the preference has been set forcing a granular activity. For example, override is not relevant for a ship node that does not require pallet content verification at a vendor level.

### 5.3.5.2 Modifying a Receiving Preference

Once a Receiving Preference has been created, it can be modified.

To modify a receiving preference:

1. From the tree in the application rules side panel, choose Receiving > Document Specific > Purchase Order > Receiving Preferences.
2. The Receiving Preferences : Purchase Order window is displayed with the list of existing rules.
3. Enter information in the applicable fields. Refer [Table 5–18](#) for field value descriptions.
4. Choose .

Any modification to a receiving preference is applied to all future transactions.

### 5.3.6 Defining Receiving Disposition

You can define common codes for receiving dispositions used when handling a receipt. This common code identifies what happens to items for the document type when they are received.

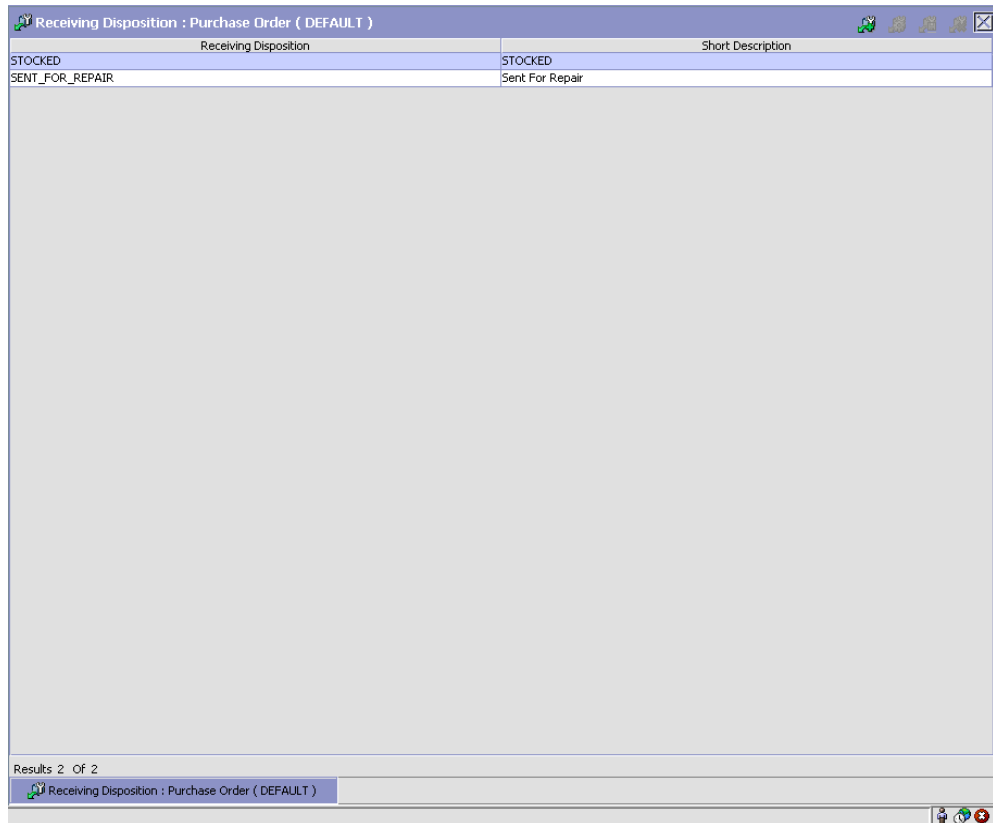
Use Receiving Disposition for:



- [Creating a Receiving Disposition](#)
- [Creating a New Receiving Disposition From an Existing Receiving Disposition](#)
- [Modifying a Receiving Disposition](#)
- [Deleting a Receiving Disposition](#)

#### **5.3.6.1 Creating a Receiving Disposition**

To create a receiving disposition:

1. From the tree in the application rules side panel, choose Receiving > Document Specific > Purchase Order > Receiving Disposition.
2. The Receiving Disposition : Purchase Order window is displayed.



3. In the Receiving Disposition : Purchase Order window, choose . The Disposition Details pop-up window appears.
4. Enter information in the applicable fields. Refer [Table 5–19](#) for field value descriptions.
5. Choose .

**Disposition Details**

Receiving Disposition: SENT\_FOR\_REPAIR

Short Description: Sent For Repair

Product Class: SFC

☐ Damaged ☐ Final Disposition

**Disposition Transitions**

Receiving Disposition	
*	

Results 0 Of 0

**Table 5–19 Disposition Details Pop-up Window**



Field	Description
Receiving Disposition	Enter the name of the receiving disposition.
Short Description	Enter a brief description of the receiving disposition.
Product Class	Select a product class to associate with received items, if applicable.  For example, you could assign the product class of Returned to any returned items.
Damaged	Select Is Damaged if the receiving disposition is used for handling damaged items.
Final Disposition	Select Final Disposition if the receiving disposition is to be used as final disposition for the receipt.  Final Disposition marks the disposition code as final, and does not allow any further disposition transitions.

*Table 5–19 Disposition Details Pop-up Window*

Field	Description
Disposition Transitions	This displays the existing Receiving Disposition codes that are available for associating a transition with the Receiving Disposition being created or modified.
Receiving Disposition	Existing Receiving Disposition Code available for transition association.

### 5.3.6.2 Creating a New Receiving Disposition From an Existing Receiving Disposition


To create a new receiving disposition from an existing receiving disposition:

1. From the tree in the application rules side panel, choose Receiving > Document Specific > Purchase Order > Receiving Disposition.
2. The Receiving Disposition : Purchase Order window is displayed with the list of Receiving Dispositions.
3. Choose the Receiving Disposition to be copied from. Choose . The Disposition Details pop-up window appears.
4. Enter information in the applicable fields. Refer [Table 5–19](#) for field value descriptions.
5. Choose .

### 5.3.6.3 Modifying a Receiving Disposition

Once a Receiving Disposition has been created, it may be modified.


To modify a receiving disposition:

1. From the tree in the application rules side panel, choose Receiving > Document Specific > Purchase Order > Receiving Disposition.
2. The Receiving Disposition : Purchase Order window is displayed with the list of Receiving Dispositions.
3. Select the Receiving Disposition to be modified. Choose . The Disposition Details pop-up window appears.
4. Enter information in the applicable fields. Refer [Table 5–19](#) for field value descriptions.

5. Choose .

#### 5.3.6.4 Deleting a Receiving Disposition

To delete a receiving disposition:

1. From the tree in the application rules side panel, choose Receiving > Document Specific > Purchase Order > Receiving Disposition.
2. The Receiving Disposition : Purchase Order window is displayed with the list of Receiving Dispositions.
3. Select the Receiving Disposition to be deleted.
4. Choose .

### 5.3.7 Defining Disposition Codes

A disposition code identifies the product class and inventory status to be assigned to the inventory being received.


The valid list of disposition codes are typically managed as a central repository. The disposition code and description are automatically defaulted by the system for the appropriate type of order from the Reverse Logistics department, who typically own the disposition codes for the inventory.

Use Disposition Codes for:

- [Creating a Receiving Disposition Code](#)
- [Modifying a Receiving Disposition Code](#)

#### 5.3.7.1 Creating a Receiving Disposition Code

To create a receiving disposition code:

1. From the tree in the application rules side panel, choose Receiving > Document Specific > Purchase Order > Disposition Codes.
2. The Disposition Code : Purchase Order window is displayed.
3. Enter information in the applicable fields. Refer [Table 5–20](#) for field value descriptions.
4. Choose .

Disposition Code	Description	Product Class	Inventory Status
STOCKED	STOCKED	SFC	
SENT_FOR_REPAIR	Sent For Repair	SFC	

Results: 2 Of 0

**Table 5–20 Receiving Disposition : Purchase Order Window**

Field	Description
Disposition Code	The disposition code is displayed.
Description	The description associated with the disposition code is displayed.
Product Class	Indicates the product class for the disposition.
Inventory Status	Choose the inventory status for the disposition. This is a mandatory field, and needs to be entered.



Inventory is received with the specified product class and inventory status of the disposition code entered.


If the product class is not specified, the product class from the purchase order or the default product class from the item is used. It is mandatory to have the product class specified at one of these levels.

The disposition codes allow inspectors to utilize their terminology, instead of understanding inventory and storage implications.

### 5.3.7.2 Modifying a Receiving Disposition Code

Once a Receiving Disposition Code has been created, it can be modified.

To modify a receiving disposition code:

1. From the tree in the application rules side panel, choose Receiving > Document Specific > Purchase Order > Disposition Codes.
2. The Disposition Code : Purchase Order window is displayed with the list of existing dispositions.
3. Enter information in the applicable fields. Refer [Table 5–20](#) for field value descriptions.
4. Choose .

*Only the inventory status associated with the disposition may be modified. The change of inventory status is applied to all future transactions.*

## 5.4 Defining Transfer Order

A transfer order in Yantra 7x WMS indicates transfers between the network of warehouses. A transfer order is received in multiple shipments. A transfer consists of a replenishment order from a regional distribution center or a transfer of items from another distribution center.

The ability to configure receiving processes for a transfer order in the warehouse is detailed here.

Use Transfer Order set-up for:

- [Defining Receipt Modification Rules](#)
- [Defining Receipt Process Type Details](#)
- [Defining Receipt Process Model](#)

- [Defining Receiving Preference](#)
- [Defining Receiving Disposition](#)
- [Defining Disposition Codes](#)

### 5.4.1 Defining Receipt Modification Rules




Most order document types flow through a pipeline without requiring any intervention by a customer service representative. However, there are times when modifications are required, such as changing credit card information or quantity. Yantra 7x supports modifications through the Yantra 7x Application Consoles and APIs. It is critical for you to decide which modifications are allowed for each modification type, modification level, and status combination.

**Important:** Contemplate business and system integration implications before allowing a modification that is disallowed as part of the system defaults.

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

### 5.4.2 Setting Up Receipt Modification Rules

To set up receipt modification rules:

1. From the tree in the application rules side panel, choose Receiving > Document Specific > Transfer Order > Receipt Modification Rules. The Modification Rules window is displayed.
2. In the Modification Rules window, select the Transfer Order Receipt whose Modification Rule is to be set. Refer [Table 5–21](#) for field value descriptions.
3. Choose  to allow order modification.
4. Choose  to disallow order modification.
5. Choose  to ignore order modification.

For more information about defining and changing modification rules, see *Yantra 7x Distributed Order Management Configuration Guide*.

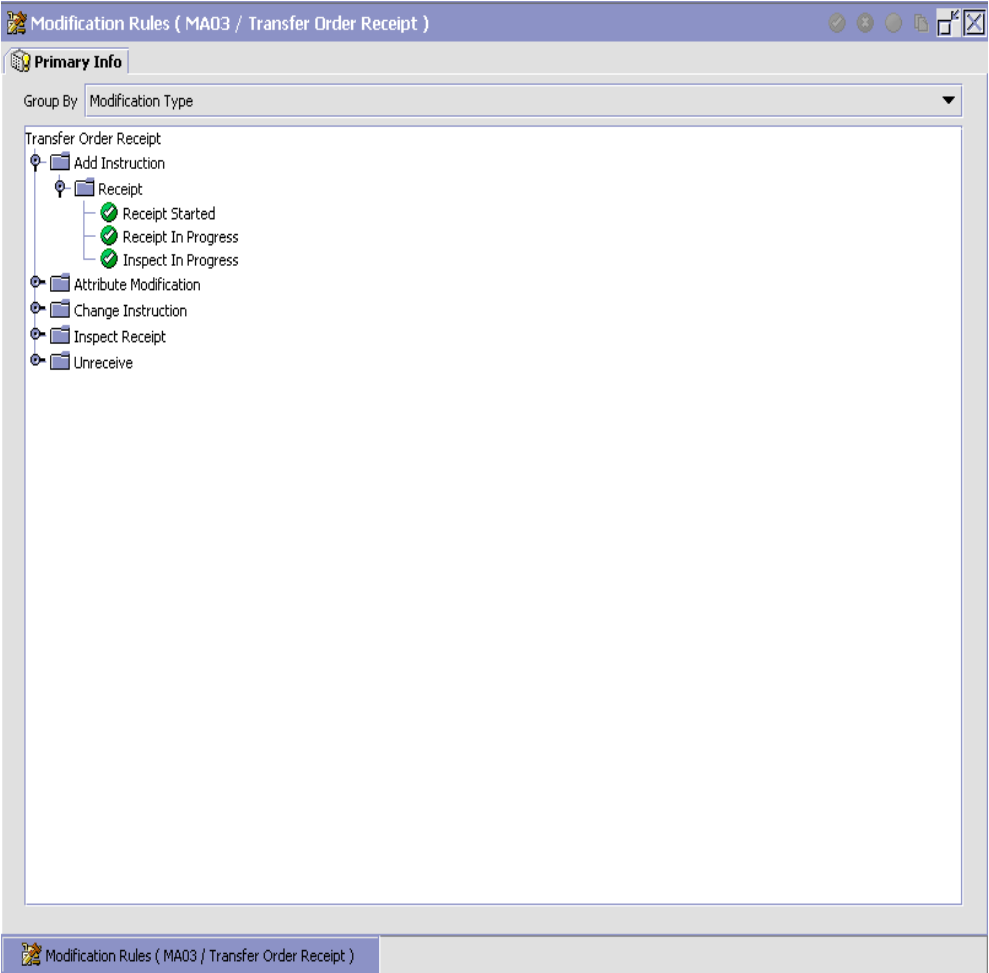


Table 5–21    *Modification Rules Window*

Field	Description
<b>Primary Info</b>	
Group by	View the Transfer Order Receipt Modification Rules grouped by Modification Type, Modification Level, or by Status.

**Table 5–21 Modification Rules Window**

Field	Description
Modification Type	<b>Transfer Order Receipt Modification Rules grouped by Modification Type. Statuses are displayed grouped by Modification Level for each Modification Type.</b>
Add Instruction	Allow or Disallow or Ignore addition of instruction appropriately.
Attribute Modification	Allow or Disallow or Ignore modification of an attribute appropriately.
Change Instruction	Allow or Disallow or Ignore change of instruction appropriately.
Receipt Complete	Allow or Disallow or Ignore completion of receipt appropriately.
Unreceive	Allow or Disallow or Ignore un-receiving of a return order appropriately.
Modification Level	<b>Transfer Order Modification Rules grouped by Modification Level. Statuses are displayed grouped by Modification Type for each Modification Level.</b>
Receipt	Allow or Disallow or Ignore modification types at receipt level appropriately.
Status	<b>Transfer Order Receipt Modification Rules grouped by Status. Modification Types are displayed grouped by Modification Level for each Status.</b>  For more information about group by status, see <a href="#">Section 5.4.4.6, "Statuses"</a> on page 362.

For more information about Modification Rules, see *Yantra 7x Distributed Order Management Configuration Guide*.

### 5.4.3 Defining Receipt Process Type Details

Receipt Process Type Details define parameters and templates that distinguish a process type.

A **process type pipeline** is a series of transactions and statuses that guide document types, such as a Transfer Order, through a predefined

process. A pipeline consists of the different statuses a document goes through during fulfillment, negotiation, shipment, or receipt. You can also set up transactions consisting of events, actions, and conditions, as they pertain to the pipeline you are configuring.

## Repositories

A repository is a logical collection of entities that define the business process workflow.

The following entities are included in a repository:

- Pipelines
- Transactions
- Statuses
- Conditions
- Actions
- Services

Yantra 7x provides a base repository for each of the system defined process types. Some of the entities within a repository are copied when creating a new document type. For more information about creating a new document type, see the *Yantra 7x Platform Configuration Guide*.

For more information about defining process type details, see *Yantra 7x Platform Configuration Guide*.

### 5.4.3.1 Viewing Receipt Process Type Details

To view transfer order receipt process type details:

1. From the tree in the application rules side panel, choose Receiving > Document Specific > Transfer Order > Receipt Process Type Details. The Process Type Details : Transfer Order window is displayed.
2. Primary information of the Process Type is displayed in the applicable fields. Refer [Table 5–22](#) for field value descriptions.

For more information about defining the primary information for process type details, see *Yantra 7x Platform Configuration Guide*.

Process Type Details : Transfer Order ( DEFAULT / MA03 )

Primary Info

Process Type

TO\_RECEIPT

Process Type Name

Transfer Order Receipt

Description

Transfer Order Receipt

Table 5–22 Process Type Details Window

Field	Description
Primary Info	
Process Type	This is automatically populated by the system as "TO_RECEIPT".

**Table 5–22 Process Type Details Window**

Field	Description
Process Type Name	This indicates the name of the process type.
Description	This provides a brief description for the process type.

## 5.4.4 Defining Receipt Process Model

The process of receiving is modeled through a pipeline. This represents the process configuration that is unique to a warehouse. A warehouse may also specify unique processes for each participating enterprise.

For example, a warehouse that performs re-packaging (VAS) for certain items in the warehouse or a warehouse that always palletizes all receipts before putaway to storage area.

### 5.4.4.1 Pipeline Determination

**Pipeline determination** is used to set up conditions that affect which pipeline is used during the start of the business process workflow. For example, an organization deals with sales orders that sometimes contain hazardous materials. They have two separate pipelines, one in which orders with order lines without any hazardous materials go through and one in which orders with order lines containing hazardous materials must go through for inspection before continuing through the order process. The organization uses pipeline determination to set up a condition that determines whether or not order lines contain hazardous materials and sends the order line down the correct pipeline.

For more information about Pipeline Determination, see *Yantra 7x Platform Configuration Guide*.

### 5.4.4.2 Hub Rule

When you expand the Pipeline Determination branch, the components displayed depends on what role you are logged in as. If you are logged in as a Hub role, the Hub Rule is displayed. If you are logged in as an Enterprise role, both the Hub Rule and all user created determination rules (For example, My Rule) components are displayed. Double-click on the applicable rule to display the pipeline determination rules.

---

---

**Note:** If you are logged in as an Enterprise role, the Hub Rule screen is grayed out and cannot be modified.

---

---

Drag conditions and pipelines into the work area to construct pipeline determination rules. A single pipeline or condition must be the root. Conditions cannot link back to an earlier component in the chain and a pipeline cannot be linked to twice.

---

---

**Note:** When configuring pipeline determination for an order document type pipeline, please note that pipeline determination is only considered when adding a line or creating an order. When changes are made to draft orders pipeline determination does not occur.

---

---

### 5.4.4.3 Condition Variables for Pipeline Determination

When using conditions for pipeline determination, the following condition variables can be used:

- Document Type
- Enterprise Code
- Seller Organization Code
- Ship Node
- Buyer Organization Code
- Receiving Node
- Receiving Node Interface Type
- Ship Mode
- Freight Terms
- Carrier Type
- Is Hazardous Material
- Is Inspection Pending
- Is Receiving Node Integrated Real Time



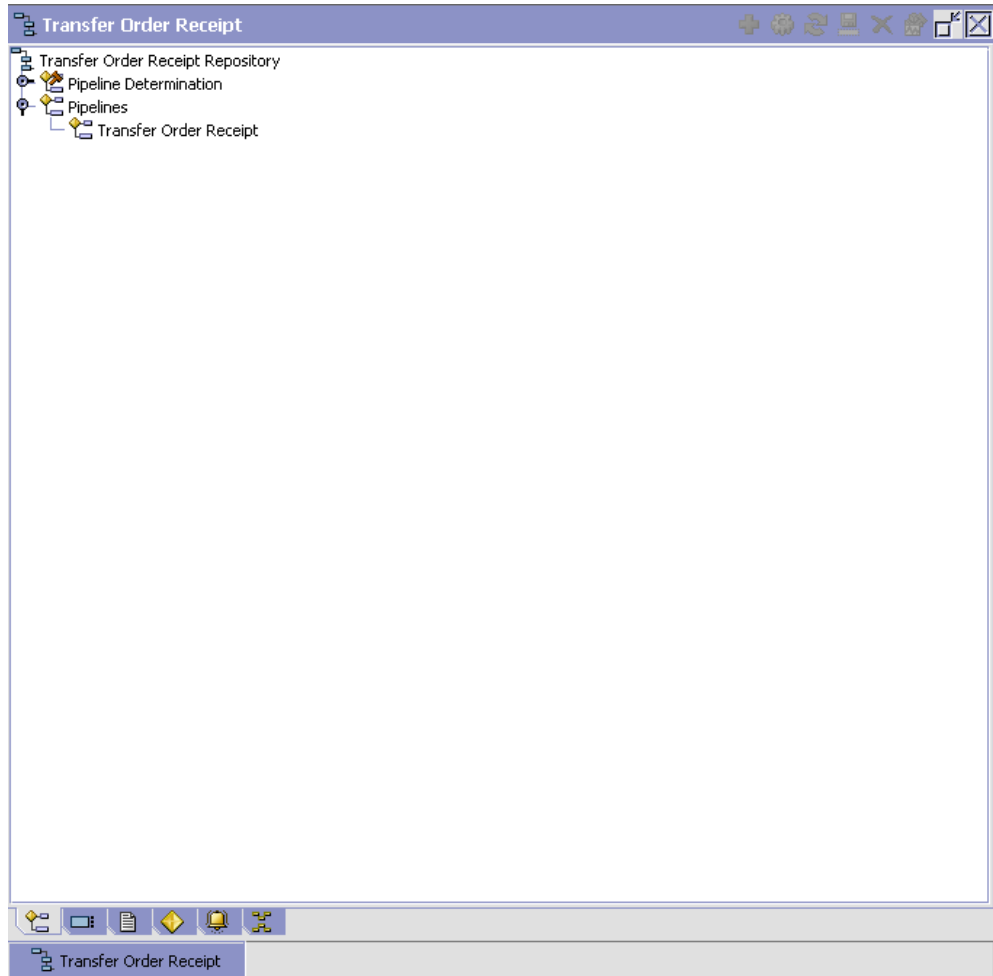
For more information about Pipeline Determination and Hub Rule, see *Yantra 7x Platform Configuration Guide*.

#### **5.4.4.4 Pipelines**

For more information about pipelines, see the *Yantra 7x Platform Configuration Guide*.

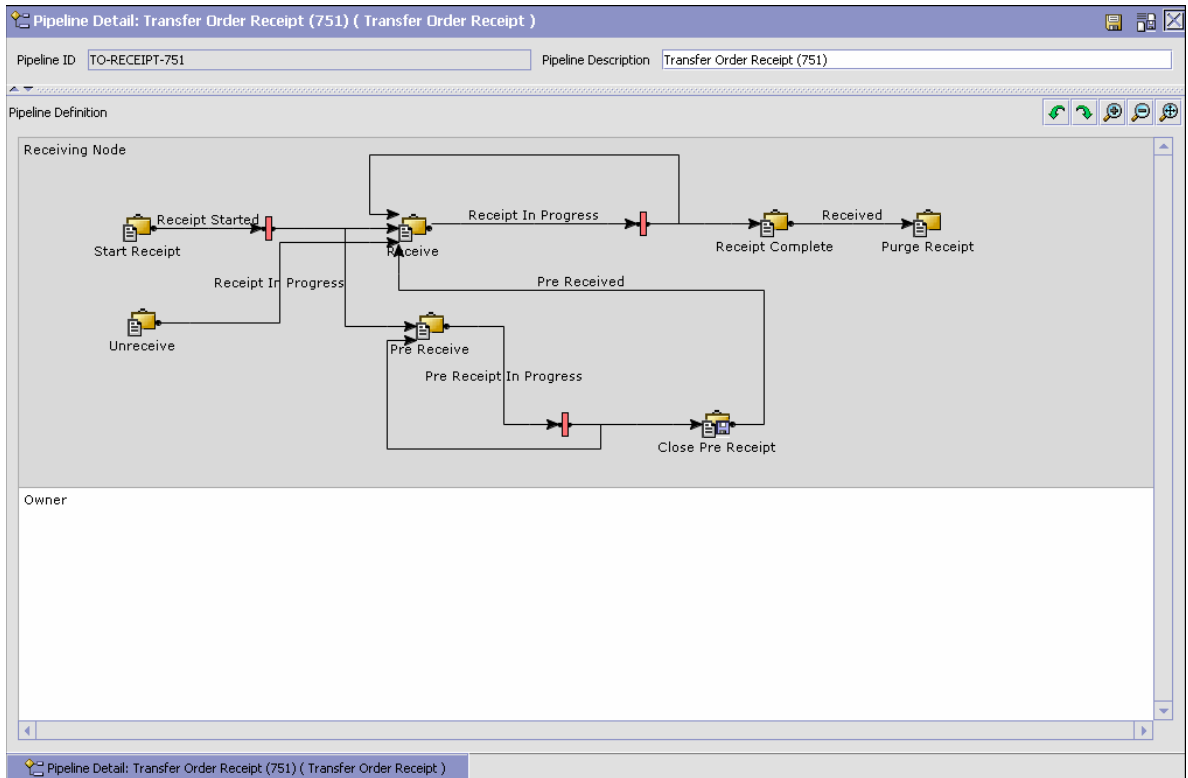
To view the transfer order receipt pipeline details:

1. From the tree in the application rules side panel, choose Receiving > Document Specific > Transfer Order > Receipt Process Model. The Transfer Order Receipt window is displayed.



2. In the Transfer Order Receipt window, choose Transfer Order Receipt Repository > Pipelines > Transfer Order Receipt.
3. The Pipeline Detail: Transfer Order Receipt (Transfer Order Receipt) window is displayed.

For more information about creating and modifying a pipeline, see the *Yantra 7x Platform Configuration Guide*.




#### 5.4.4.5 Transactions

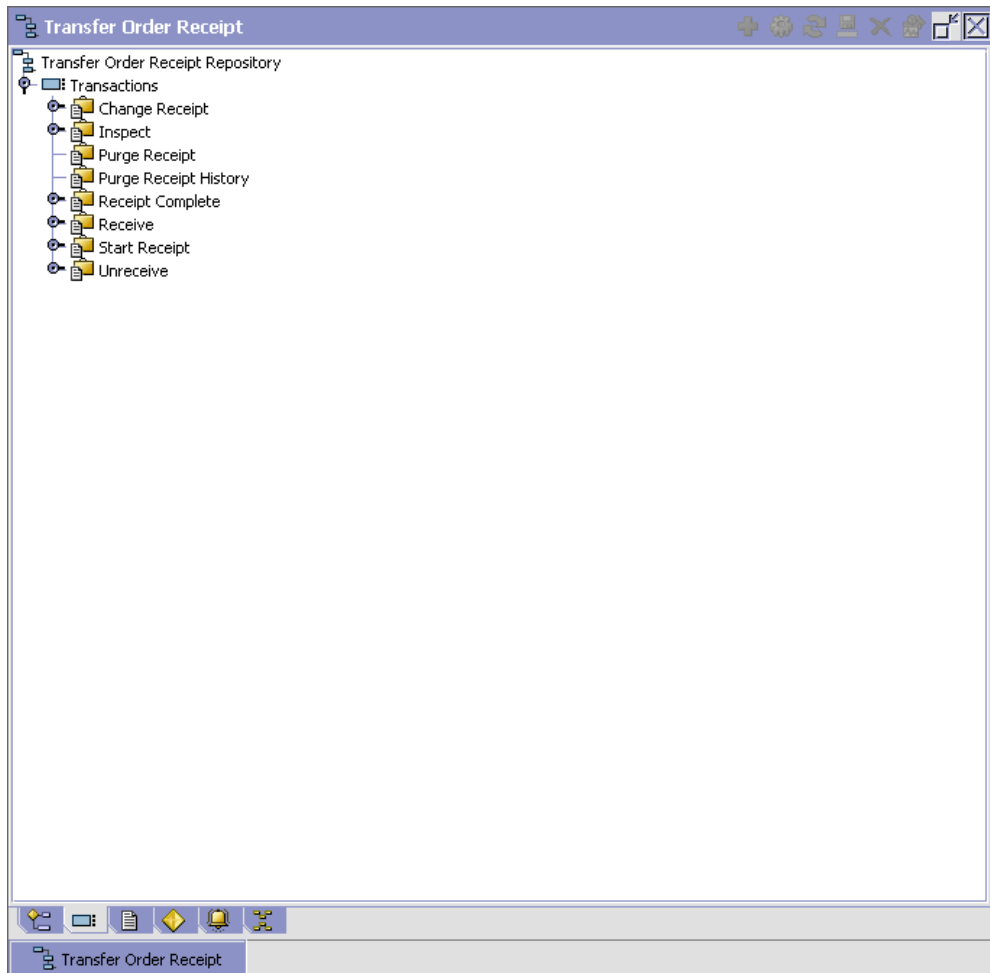
Every process type has a set of base transactions defined for it. A transaction is a logical unit of work that is necessary for performing activity within Yantra 7x. Base transactions are predefined transactions that contain information about how the transaction behaves, such as how many copies of a transaction can be kept in a process type and whether or not it can have configurable base pick and drop statuses. Base transactions can be used to create new transactions. These transactions can be changed within the limits defined in the base transaction.

For more information about Transactions, see *Yantra 7x Platform Configuration Guide*.

To view the transaction details for a transfer order receipt pipeline:

1. From the tree in the application rules side panel, choose Receiving > Document Specific > Transfer Order > Receipt Process Model. The Transfer Order Receipt window is displayed.
2. In the Transfer Order Receipt window, choose .
3. The Transactions tab window is displayed.

For more information about creating and modifying Transactions, see *Yantra 7x Platform Configuration Guide*.



**Table 5–23 Transfer Order Receipt Pipeline - Transactions Tab Window**


Field	Description
Change Receipt	This transaction represents the receipt details being modified after a receipt for a shipment is recorded.
Close Pre Receipt	<p>This transaction represents the closure of pre-receipts for a shipment.</p> <p>Pre-receipt allows a warehouse to indicate the receipt of containers for a shipment. The visibility provided to the other departments allows for exception handling. For example, during item shortage in the pick areas, supervisors monitor incoming shipments to request for emergency receipt of a particular shipment.</p>
Inspect	This transaction represents the step of inspecting a shipment. This is required to complete the disposition of product received.
Pre Receive	This transaction represents a shipment may be pre-received before it is actually received in the warehouse.
Purge Receipt	<p>This transaction represents a shipment that may be purged (moved out of) from primary transactional tables to the history tables.</p> <p>For more information about purge criteria, see <a href="#">Section 12.8, "Defining Purge Criteria"</a> on page 930.</p>
Purge Receipt History	<p>This transaction represents a shipment may now be purged (moved out of) from the history tables.</p> <p>For more information about purge criteria, see <a href="#">Section 12.8, "Defining Purge Criteria"</a> on page 930.</p>
Receipt Complete	This transaction represents the completion of receipt of a shipment. It is invoked automatically from receipt screens or manually from a console or through the close receipt agent.
Receive	This transaction represents receipt of product on a shipment.
Start Receipt	This transaction represents the opening of a receipt for shipment. This is invoked either manually from a console or automatically invoked from consoles or RF.
Unreceive	This transaction represents the correction of received quantity against a shipment.

### 5.4.4.6 Statuses

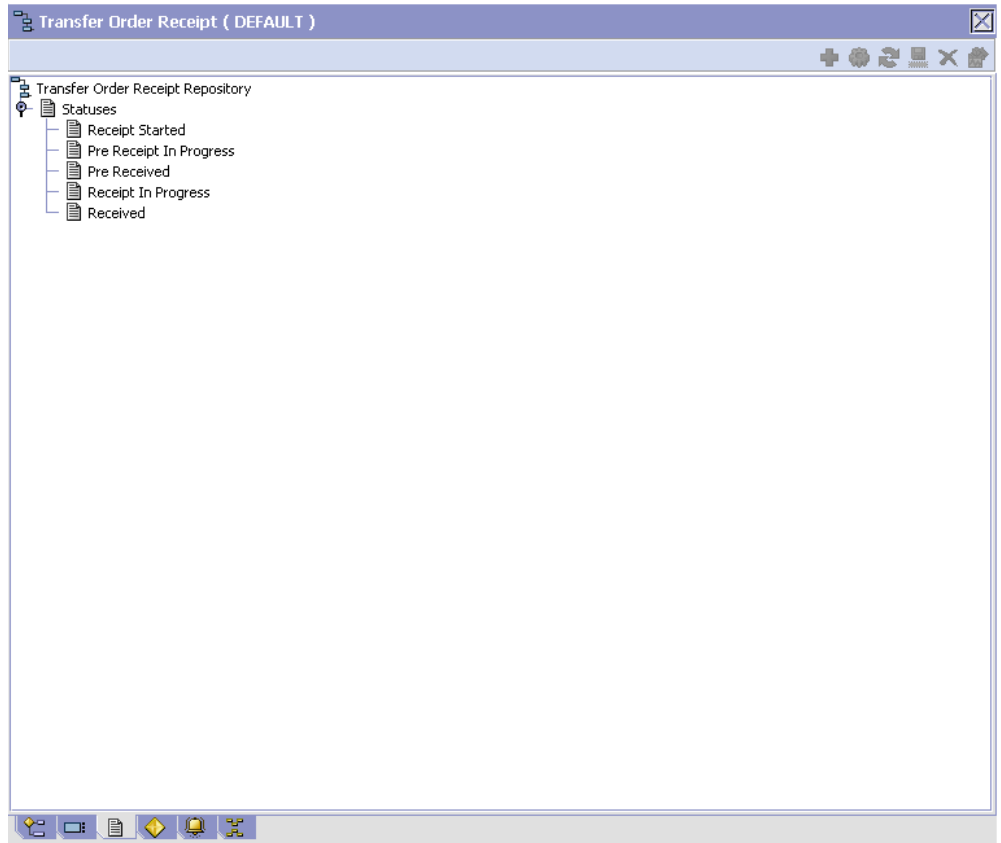
**Statuses** are the actual states that a document moves through in the pipeline. A transaction can contain two types of statuses, a drop status and a pickup status. A document is moved into a **drop status** when the events and conditions of a transaction have been completed. A **pickup status** takes the document from the previous drop status and moves it through the next transaction. Created and Scheduled are examples of statuses.

For more information about Statuses, see *Yantra 7x Platform Configuration Guide*.

To view the status details of a transfer order receipt pipeline:

1. From the tree in the application rules side panel, choose Receiving > Document Specific > Transfer Order > Receipt Process Model. The Transfer Order Receipt window is displayed.
2. In the Transfer Order Receipt window, choose .
3. The Statuses tab window is displayed.

For more information about creating and modifying Statuses, see *Yantra 7x Platform Configuration Guide*.



**Table 5–24 Transfer Order Receipt Pipeline - Statuses Tab Window**

Field	Description
Receipt Started	This indicates that the shipment is opened for receipt. This corresponds to 'Start Receipt' transaction.
Pre Receipt In Progress	This indicates that pre-receipt for the shipment is in progress. This corresponds to 'Pre-receive' transaction.

**Table 5–24 Transfer Order Receipt Pipeline - Statuses Tab Window**


Field	Description
Pre Received	This indicates that pre-receipt process for the shipment is completed. This corresponds to 'Close-PreReceipt' transaction.
Receipt In Progress	This indicates that receiving for the shipment is in progress. This corresponds to 'Receive' or 'Un-Receive' transactions.
Received	This indicates that receiving for the shipment is complete. This corresponds to 'Receipt Complete' transaction.

#### 5.4.4.7 Conditions

A **condition** matches document type attributes against decision points and routes the documents to different paths based on the specified attribute and value combinations. The document type attributes against which conditions can be created are predefined in Yantra 7x. You can use these attributes in any combination or you can create conditions that execute the appropriate application logic for specific circumstances.

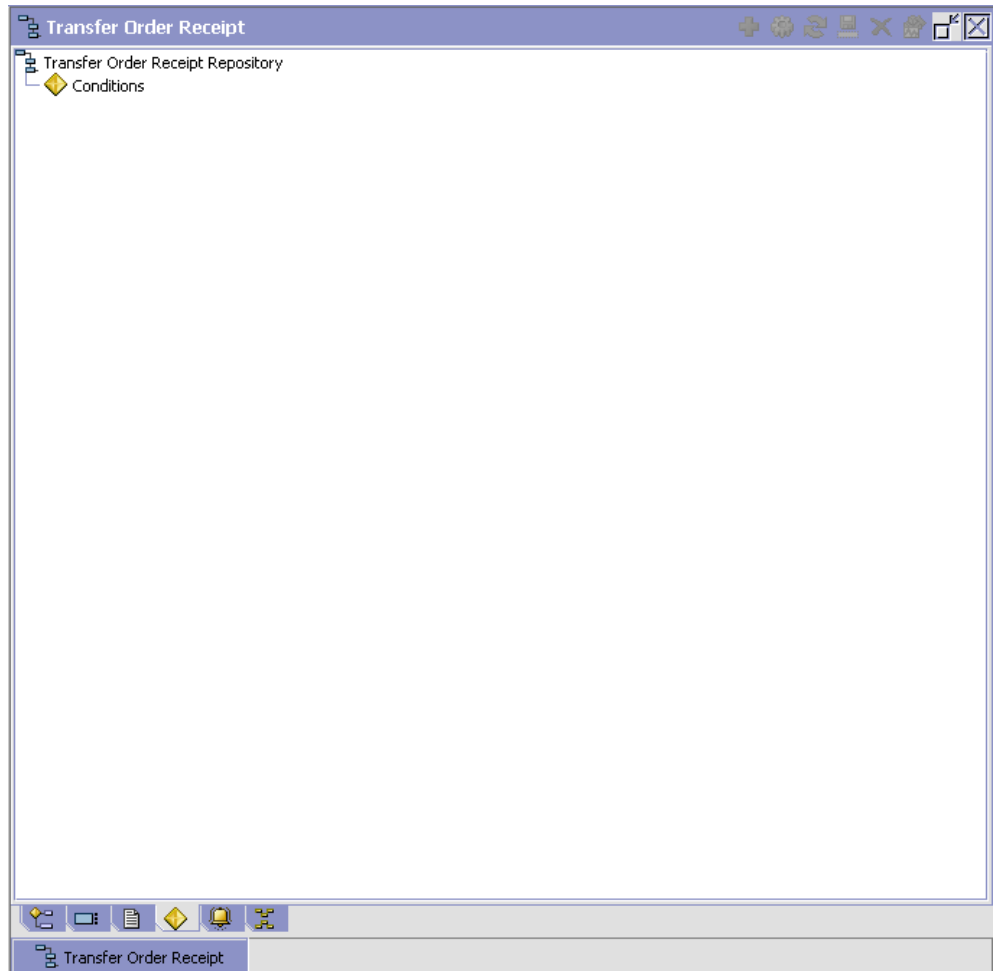
For more information about Conditions, see *Yantra 7x Platform Configuration Guide*.

To view the condition details of a transfer order receipt pipeline:

1. From the tree in the application rules side panel, choose Receiving > Document Specific > Transfer Order > Receipt Process Model. The Transfer Order Receipt window is displayed.
2. In the Transfer Order Receipt window, choose .
3. The Conditions tab window is displayed.

For more information about creating and modifying Conditions, see *Yantra 7x Platform Configuration Guide*.





**Table 5–25** *Transfer Order Receipt Pipeline - Conditions Tab Window*

Field	Description
Conditions	Displays conditions that are specific to the transfer order receipt pipeline, if any.

Yantra 7x WMS default pipeline does not have any conditions specified.


### 5.4.4.8 Actions

An **action** is a process or program that is triggered by an event. These processes and programs send user alert notifications and automatically resolve issues.

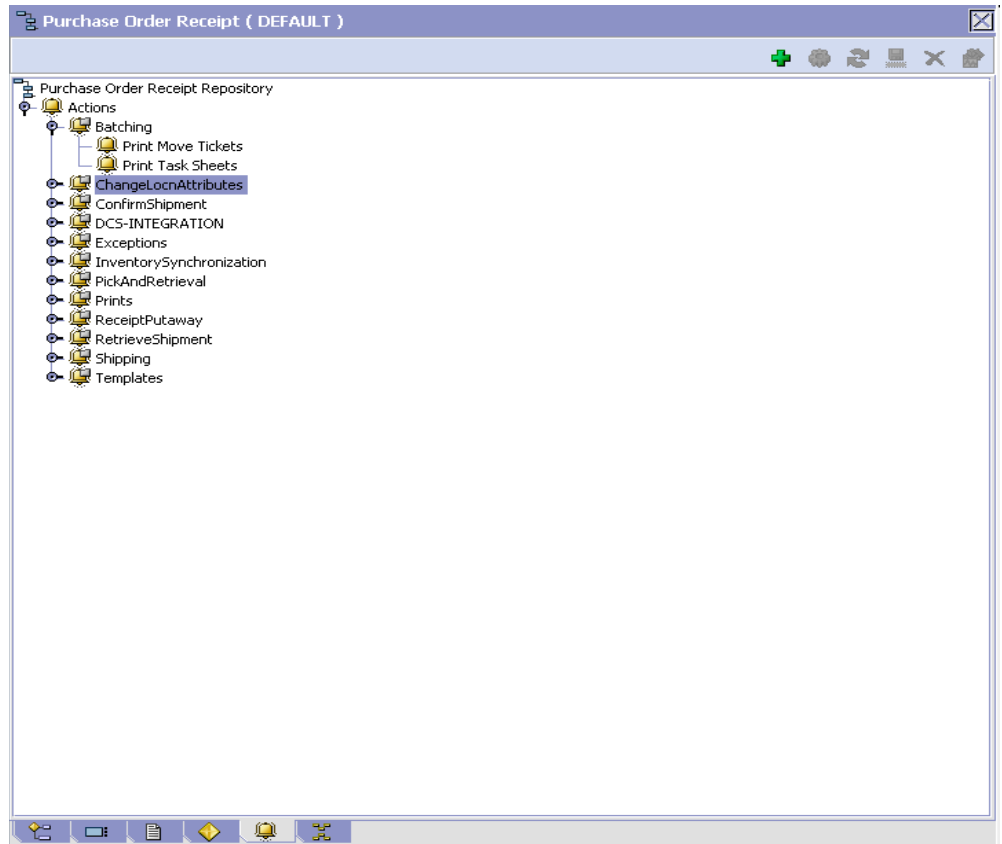
For example, when an order is released (the event), you can set an action to send the customer an e-mail.

For more information about Actions, see *Yantra 7x Platform Configuration Guide*.

To view the action details of a transfer order receipt pipeline:

1. From the tree in the application rules side panel, choose Receiving > Document Specific > Transfer Order > Receipt Process Model. The Transfer Order Receipt window is displayed.
2. In the Transfer Order Receipt window, choose .
3. The Actions tab window is displayed.

For more information about creating and modifying Actions, see *Yantra 7x Platform Configuration Guide*.



**Table 5–26** *Transfer Order Receipt Pipeline - Actions Tab Window*

Field	Description
Batching	Default settings are provided for: <b>Print Move Tickets</b> – Invokes the batch printing service for printing the move tickets. <b>Print Task Sheets</b> – Invokes the batch print service for printing the task sheets.
ChangeLocnAttributes	

**Table 5–26 Transfer Order Receipt Pipeline - Actions Tab Window**

Field	Description
ConfirmShipment	Default settings are provided for: <b>ConfirmShipment</b> – Invokes the confirmShipment flow to confirm the shipment.
DCS-Integration	Default settings are provided for: <b>InventoryDownload</b> – Invokes the YantraWMSInventoryDownloadService service to download the inventory information from Yantra 7x to Yantra DCS. <b>PODownload</b> – Invokes the YantraWMSPODownloadService service to download the Purchase Order information from Yantra 7x to Yantra DCS.
Exceptions	Default settings are provided for: <b>ShortagesDetected</b> – Invokes the LogWavePlaFailure exception service when shortage of inventory occurs during wave release.
InventorySynchronization	Default settings are provided for: <b>CollectInventoryMismatch</b> – This service collects the inventory mismatch information between an external system and Yantra 7x. This is typically caused when some inventory updates at a node or a warehouse are not reported to Yantra 7x.
PickAndRetrieval	Default settings are provided for: <b>ConfirmEmptyLocationAfterPick</b> – Invokes the GenerateCountRequest flow which creates a count request.

**Table 5–26 Transfer Order Receipt Pipeline - Actions Tab Window**

Field	Description
Prints	<p>Default settings are provided for:</p> <p><b>PickList Print</b> – Invokes the print service for printing the Pick List.</p> <p><b>LTL Manifest</b> – Invokes the print service for printing the Less-than Truck Load Manifest.</p> <p><b>Print Load BOL</b> – Invokes the print service for printing the Load Bill of Lading.</p> <p><b>Print PackList</b> – Invokes the print service for printing the Pack List.</p> <p><b>Print Post Pick Container Labels</b> – Invokes the print service for printing UCC-128 container labels for containers, when system defined packing process is used.</p> <p><b>Print Shipment BOL</b> – Invokes the print service for printing the Shipment Bill of Lading.</p> <p><b>Print Shipping Label</b> – Invokes the print service for printing the UCC-128 container labels.</p> <p><b>Print Wave</b> – Invokes the Print service for printing a Wave.</p>
ReceiptPutaway	<b>Putaway products on receipt closure</b> – Indicates the default action provided to automatically initiate putaway of purchase order receipts.
RetrieveShipment	<b>Retrieve Requested Serial</b> – This service invokes the retrieveShipment API to retrieve the requested serials to the specified location.

**Table 5–26 Transfer Order Receipt Pipeline - Actions Tab Window**


Field	Description
Shipping	<p>Default settings are provided for:</p> <p><b>Load Left Origin</b> – Invokes the doLoadLeftOriginUpdates service to mark that the load has left the origin.</p> <p><b>Stop Shipping</b> – Invokes the RaiseStopShippingAlert service to raise an alert to stop the processing of the shipment.</p>
Templates	<p>Default settings are provided for:</p> <p><b>Log Exception</b> – Logs the reasons due to which a count request could not be created for a Count Program.</p> <p><b>Publish Data</b> – Sends data to external queue or internal tables.</p> <p><b>Raise Exception</b> – Raises an alert using Yantra 7x Event Management from the published information.</p> <p><b>Send Email</b> – Raises an email action to create an email in the template format from the published information.</p> <p><b>Send Email-HTML format</b> – Raises an email action to create an email in HTML format from the published information.</p>

#### 5.4.4.9 Service Definitions

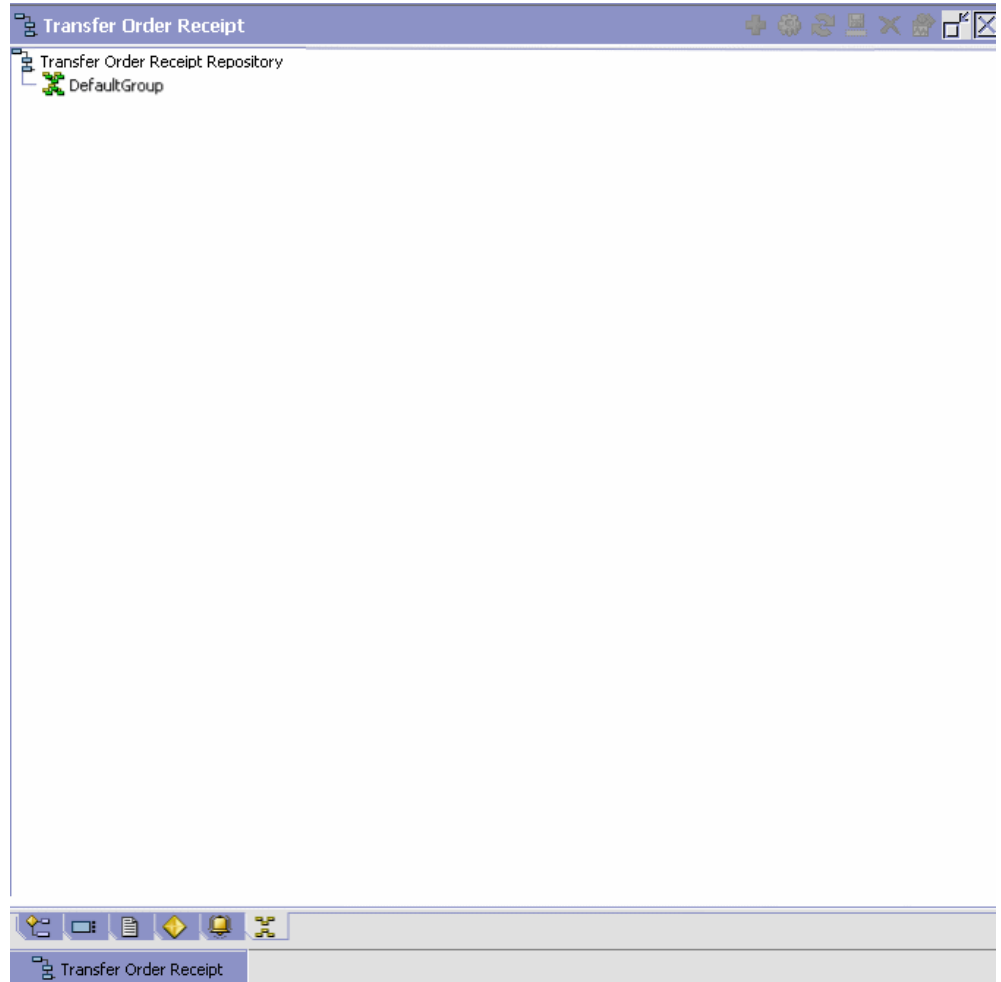
Service definitions are a representation of the logic that regulates document workflow services. The Service Builder is a graphical interface that enables you to create a graphical representation of these *services*.

For more information about Service Definitions, see *Yantra 7x Platform Configuration Guide*.

To view the service definition details of a transfer order receipt pipeline:

1. From the tree in the application rules side panel, choose Receiving > Document Specific > Transfer Order > Receipt Process Model. The Transfer Order Receipt window is displayed.
2. In the Transfer Order Receipt window, choose .
3. The Service Definitions tab window is displayed.

For more information about creating and modifying Service Definitions, see *Yantra 7x Platform Configuration Guide*.



**Table 5–27 Transfer Order Receipt Pipeline - Service Definition Tab Window**

Field	Description
Default Group	Displays flows that are specific to the transfer order receipt pipeline.

Yantra 7x WMS default pipeline does not have any conditions specified.

### 5.4.5 Defining Receiving Preference

The receiving preference configuration manages the receiving process of a warehouse.


A receiving preference identifies the characteristics of inbound shipments and provides guidelines to the execution transactions.

Use Receiving Preferences for:

- [Creating a Receiving Preferences](#)
- [Modifying a Receiving Preference](#)

#### 5.4.5.1 Creating a Receiving Preferences

To create a receiving preference:

1. From the tree in the application rules side panel, choose Receiving > Document Specific > Transfer Order > Receiving Preferences.
2. The Receiving Preferences : Transfer Order window is displayed.
3. Enter information in the applicable fields. Refer [Table 5–28](#) for field value descriptions.
4. Choose .



Receiving Rules : Transfer Order : DEFAULT ( DEFAULT / MA03 )

Shipment entry allowed

Build Pallet

Always

Optional

If Item Tag or Serial tracked

Build Case

Always

Optional

If Item Tag or Serial tracked

Disposition Code

Receipt with QC

Receipt without QC

Preference for receipt closure by agent

Unconditionally

Received quantity at least equal to expected quantity

After Put away completion

Vendor Preferences

Vendor	Vendor Classification	Item ID	Item Classification	Force Case Content entry	Requires QC
--------	-----------------------	---------	---------------------	--------------------------	-------------

Results 0

Receiving Rules : Transfer Order : DEFAULT ( DEFAULT / MA03 )

Configuring Receiving 373

**Table 5–28 Receiving Preferences : Transfer Order Window**

Field	Description
Shipment Entry Allowed	<p>Select if shipment entry is to be created when a particular shipment is not available on the system.</p> <p>"Allow Shipment Entry" enables the system to automatically create a shipment entry in the system, if a shipment entry does not exist when a "Start Receipt" operation is performed.</p> <p>On creation and confirmation of the shipment, the "Include in Receipt" transaction is executed, to enable the receiving process to be carried out on this receipt.</p> <p>Warehouses that receive shipment information in fax or email form can manually enter the information into the system. This allows for enhanced tracking and visibility.</p>
<b>Build Pallet</b>	
Always	Select if building of a pallet is mandatory during the receipt process.
Optional	Select if building of a pallet is optional.
If Item Tag or Serial Tracked	Select if building of pallet is required for items that are tag or serial tracked.
<b>Build Case</b>	
Always	Select if building of case is mandatory during the receipt process.
Optional	Select if building of case is optional.
If Item Tag or Serial tracked	Select if building of case is required for items that are tag or serial tracked.
<b>Disposition Code</b>	
Receipt with QC	Choose the disposition code to associate with receipts for vendors or shipments that require QC.
Receipt without QC	Choose the disposition code to associate with receipts for vendors or shipment that do not require QC.
<b>Preference for Receipt Closure by Agent</b>	

**Table 5–28 Receiving Preferences : Transfer Order Window**

Field	Description
Unconditionally	Select if receipt closure by the agent occurs every time the closure agent is run.  This is typically used where receipts are closed as end-of-day process.
Received quantity at least equal to expected quantity	Select if receipt closure by the agent occurs when the received quantity is at least equal to the expected quantity.
After Putaway Completion	Select if receipt closure by the agent occurs after putaway is completed.  This applies to warehouses that indicate availability only when inventory is putaway to their storage locations.
<b>Vendor Preferences</b>	Populated automatically from vendor preferences in Yantra 7x Supply Collaboration.  The preferences are evaluated to determine the best preference. The preference with most matches to the order details is determined as the best preference.  For more information about Defining Customer Classifications, see <i>Yantra 7x Supply Collaboration Configuration Guide</i> .
Vendor	This indicates the vendor.  A vendor is defined as an external company that supplies materials that you order. You receive materials from your vendors. You are, in turn, vendors to your customers.
Vendor Classification	This indicates classification of the vendor.
Item ID	This indicates item ID.
Item Classification	This indicates the custom defined item storage definition.
Force Case Content entry	This indicates whether case content entry during receipt must be forced.
Requires QC	This indicates whether QC is required or not.

The closure of a shipment triggers the upload of receipt information to external HOST systems or updated in Yantra Supply Chain

Synchronization. For example, inventory availability for the shipment is moved from an in-transit to on-hand.

Vendor specific preferences, if any, configured as part of the Yantra 7x Supply Collaboration are displayed here. For more information, see *Yantra 7x Supply Collaboration Configuration Guide*.


Preferences for receiving a shipment are specified as a receiving preference for the ship node and enterprise level. A supervisor, may choose to override these preferences for a specific vendor. For example, a ship node requiring case content verification for most vendors. For a particular vendor a supervisor can override this requirement while manually creating shipment.

The feature of override is only relevant when the preference has been set forcing a granular activity. For example, override is not relevant for a ship node that does not require pallet content verification at a vendor level.

### 5.4.5.2 Modifying a Receiving Preference

Once a Receiving Preference has been created, it can be modified.

To modify a receiving preference:

1. From the tree in the application rules side panel, choose Receiving > Document Specific > Transfer Order > Receiving Preference.
2. The Receiving Preferences : Transfer Order window is displayed with the list of existing rules.
3. Enter information in the applicable fields. Refer [Table 5–28](#) for field value descriptions.
4. Choose .

Any modification to a receiving preference is applied to all future transactions.

### 5.4.6 Defining Receiving Disposition

You can define common codes for receiving dispositions used when handling a receipt. This common code identifies what happens to items for the document type when they are received.

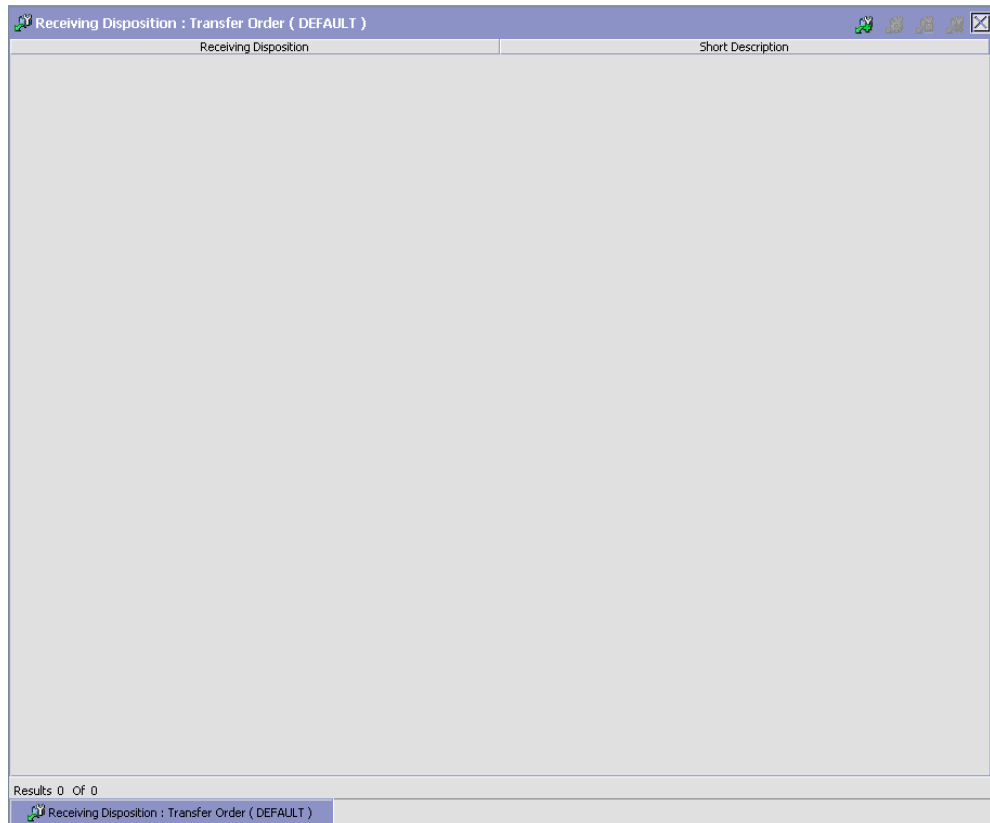
Use Receiving Disposition for:



- [Creating a Receiving Disposition](#)
- [Creating a New Receiving Disposition From an Existing Receiving Disposition](#)
- [Modifying a Receiving Disposition](#)
- [Deleting a Receiving Disposition](#)

#### **5.4.6.1 Creating a Receiving Disposition**

To create a receiving disposition:

1. From the tree in the application rules side panel, choose Receiving > Document Specific > Transfer Order > Receiving Disposition.
2. The Receiving Disposition : Transfer Order window is displayed.



3. In the Receiving Disposition : Transfer Order window, choose . The Disposition Details pop-up window appears.
4. Enter information in the applicable fields. Refer [Table 5–29](#) for field value descriptions.
5. Choose .

**Disposition Details**

Receiving Disposition

Short Description

Product Class  ▼

☐ Damaged ☐ Final Disposition

**Disposition Transitions : Transfer Order ( DEFAULT )** ✕

	Receiving Disposition
*	

Results 0 Of 0

**Table 5–29** *Disposition Details Pop-up Window*



Field	Description
Receiving Disposition	Enter the name of the receiving disposition.
Short Description	Enter a brief description of the receiving disposition.
Product Class	Select a product class to associate with received items, if applicable. For example, you could assign the product class of Returned to any returned items.
Damaged	Select Is Damaged if the receiving disposition is used for handling damaged items.
Final Disposition	Select Final Disposition if the receiving disposition is to be used as final disposition for the receipt. Final Disposition marks the disposition code as final, and does not allow any further disposition transitions.

**Table 5–29** *Disposition Details Pop-up Window*

Field	Description
Disposition Transitions	<b>This displays the existing Receiving Disposition codes that are available for associating a transition with the Receiving Disposition being created or modified.</b>
Receiving Disposition	Existing Receiving Disposition Code available for transition association.

#### 5.4.6.2 Creating a New Receiving Disposition From an Existing Receiving Disposition


To create a new receiving disposition from an existing receiving disposition:

1. From the tree in the application rules side panel, choose Receiving > Document Specific > Transfer Order > Receiving Disposition.
2. The Receiving Disposition : Transfer Order window is displayed with the list of Receiving Dispositions.
3. Choose the Receiving Disposition to be copied from. Choose . The Disposition Details pop-up window appears.
4. Enter information in the applicable fields. Refer [Table 5–29](#) for field value descriptions.
5. Choose .

#### 5.4.6.3 Modifying a Receiving Disposition

Once a Receiving Disposition has been created, it may be modified.

To modify a receiving disposition:


1. From the tree in the application rules side panel, choose Receiving > Document Specific > Transfer Order > Receiving Disposition.
2. The Receiving Disposition : Transfer Order window is displayed with the list of Receiving Dispositions.
3. Select the Receiving Disposition to be modified. Choose . The Disposition Details pop-up window appears.
4. Enter information in the applicable fields. Refer [Table 5–29](#) for field value descriptions.



5. Choose .

#### 5.4.6.4 Deleting a Receiving Disposition

To delete a receiving disposition:

1. From the tree in the application rules side panel, choose Receiving > Document Specific > Transfer Order > Receiving Disposition.
2. The Receiving Disposition : Transfer Order window is displayed with the list of Receiving Dispositions.
3. Select the Receiving Disposition to be deleted.
4. Choose .

### 5.4.7 Defining Disposition Codes

A disposition code identifies the product class and inventory status to be assigned to the inventory being received.


The valid list of disposition codes are typically managed as a central repository. The disposition code and description are automatically defaulted by the system for the appropriate type of order from the Reverse Logistics department, who typically own the disposition codes for the inventory.

Use Disposition Codes for:

- [Creating a Receiving Disposition Code](#)
- [Modifying a Receiving Disposition Code](#)

#### 5.4.7.1 Creating a Receiving Disposition Code

To create a receiving disposition code:

1. From the tree in the application rules side panel, choose Receiving > Document Specific > Transfer Order > Disposition Codes.
2. The Disposition Code : Transfer Order window is displayed.
3. Enter information in the applicable fields. Refer [Table 5–30](#) for field value descriptions.
4. Choose .

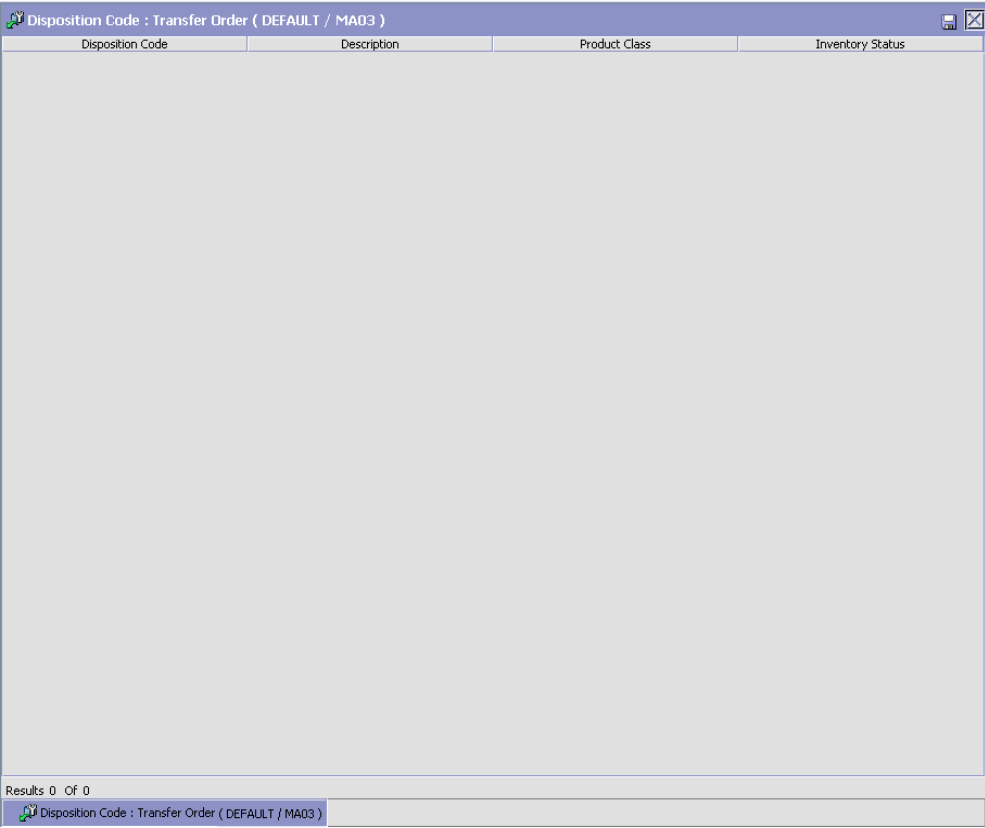


Table 5–30 Receiving Disposition Window

Field	Description
Disposition Code	The disposition code is displayed.
Description	The description associated with the disposition code is displayed.
Product Class	Indicates the product class for the disposition.
Inventory Status	Choose the inventory status for the disposition. This is a mandatory field, and needs to be entered.

Inventory is received into the specified product class and inventory status for the disposition code entered.


If the Product class is not specified, the product class from the purchase order or the default product class from the item is used. It is mandatory to have product class is specified at one of these levels.

The disposition codes allow inspectors to utilize their terminology, instead of understanding inventory and storage implications.

#### 5.4.7.2 Modifying a Receiving Disposition Code

Once a Receiving Disposition Code has been created, it can be modified.

To modify a receiving disposition code:

1. From the tree in the application rules side panel, choose Receiving > Document Specific > Transfer Order > Disposition Codes.
2. The Disposition Code : Transfer Order window is displayed with the list of existing dispositions.
3. Enter information in the applicable fields. Refer [Table 5–30](#) for field value descriptions.
4. Choose .

*Only the inventory status associated with the disposition may be modified. The change of inventory status is applied to all future transactions.*

## 5.5 Defining Return Order

A return in Yantra 7x WMS consists of shipped items that are being returned. A return may be either authorized or arrive directly at the warehouse. The ability to implement policies governing a return is explained here.

Use Return Order set-up for:

- [Defining Receipt Modification Rules](#)
- [Defining Receipt Process Type Details](#)
- [Defining Receipt Process Model](#)
- [Defining Receiving Preferences](#)

- [Defining Receiving Disposition](#)
- [Defining Disposition Codes](#)

### 5.5.1 Defining Receipt Modification Rules




Most order document types flow through a pipeline without requiring any intervention by a customer service representative. However, there are times when modifications are required, such as changing credit card information or quantity. Yantra 7x supports modifications through the Yantra 7x Application Consoles and APIs. It is critical for you to decide which modifications are allowed for each modification type, modification level, and status combination.

**Important:** Contemplate business and system integration implications before allowing a modification that is disallowed as part of the system defaults. For example, adding instructions to a return order document type is disallowed after the release has been sent to the node.

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

### 5.5.2 Setting Up Receipt Modification Rules

To set up receipt modification rules:

1. From the tree in the application rules side panel, choose Receiving > Document Specific > Return Order > Receipt Modification Rules. The Modification Rules window is displayed.
2. In the Modification Rules window, select the Return Receipt whose Modification Rule is to be set. Refer [Table 5–31](#) for field value descriptions.
3. Choose  to allow order modification.
4. Choose  to disallow order modification.
5. Choose  to ignore order modification.

For more information about defining and changing modification rules, see *Yantra 7x Distributed Order Management Configuration Guide*.

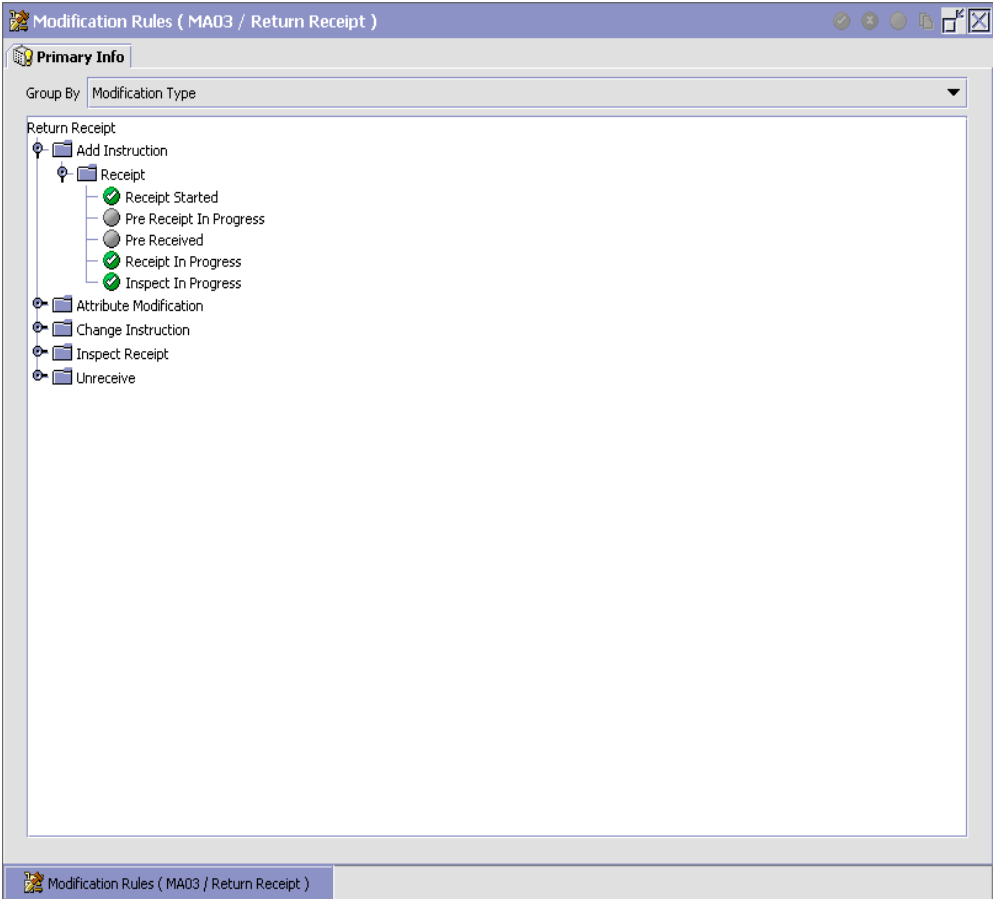


Table 5–31    *Modification Rules Window*

Field	Description
<b>Primary Info</b>	
Group by	View the Return Receipt Modification Rules grouped by Modification Type, Modification Level, or by Status.

**Table 5–31 Modification Rules Window**

Field	Description
Modification Type	<b>Return Receipt Modification Rules grouped by Modification Type. Statuses are displayed grouped by Modification Level for each Modification Type.</b>
Add Instruction	Allow or Disallow or Ignore addition of instruction appropriately.
Attribute Modification	Allow or Disallow or Ignore modification of an attribute appropriately.
Change Instruction	Allow or Disallow or Ignore change of instruction appropriately.
Receipt Complete	Allow or Disallow or Ignore completion of receipt appropriately.
Unreceive	Allow or Disallow or Ignore un-receiving of a return order appropriately.
Modification Level	<b>Return Receipt Modification Rules grouped by Modification Level. Statuses are displayed grouped by Modification Type for each Modification Level.</b>
Receipt	Allow or Disallow or Ignore modification types at receipt level appropriately.
Receipt Line	Allow or Disallow or Ignore modification types at receipt line level appropriately.
Status	<b>Return Receipt Modification Rules grouped by Status. Modification Types are displayed grouped by Modification Level for each Status.</b>  For more information about group by status, see <a href="#">Section 5.5.4.6, "Statuses"</a> on page 395.

For more information about Modification Rules, see *Yantra 7x Distributed Order Management Configuration Guide*.

### 5.5.3 Defining Receipt Process Type Details

Receipt Process Type Details define parameters and templates that distinguish a process type.

A **process type pipeline** is a series of transactions and statuses that guide document types, such as a Return Order, through a predefined process. A pipeline consists of the different statuses a document goes through during fulfillment, negotiation, shipment, or receipt. You can also set up transactions consisting of events, actions, and conditions, as they pertain to the pipeline you are configuring.

## Repositories

A repository is a logical collection of entities that define the business process workflow.

The following entities are included in a repository:

- Pipelines
- Transactions
- Statuses
- Conditions
- Actions
- Services

Yantra 7x provides a base repository for each of the system defined process types. Some of the entities within a repository are copied when creating a new document type. For more information about creating a new document type, see the *Yantra 7x Platform Configuration Guide*.

For more information about defining process type details, see *Yantra 7x Platform Configuration Guide*.

### 5.5.3.1 Viewing Receipt Process Type Details

To view receipt process type details:

1. From the tree in the application rules side panel, choose Receiving > Document Specific > Return Order > Receipt Process Type Details. The Process Type Details : Return Order window is displayed.
2. Primary information of the Process Type is displayed in the applicable fields. Refer [Table 5–32](#) for field value descriptions.

For more information about defining the primary information for process type details, see *Yantra 7x Platform Configuration Guide*.

Process Type Details

Primary Info

Process Type

RETURN\_RECEIPT

Process Type Name

Return Receipt

Description

Return Receipt

Table 5–32 Process Type Details Window

Field	Description
Primary Info	
Process Type	This is automatically populated by the system as "RETURN_RECEIPT".
Process Type Name	This indicates the name of the process type.
Description	This provides a brief description for the process type.



## 5.5.4 Defining Receipt Process Model

The process of receiving is modeled through a pipeline. This represents the process configuration that is unique to a warehouse. A warehouse may also specify unique processes for each participating enterprise.

For example, a warehouse that performs re-packaging (VAS) for certain items in the warehouse or a warehouse that always palletizes all receipts before putaway to storage area.

### 5.5.4.1 Pipeline Determination

**Pipeline determination** is used to set up conditions that affect which pipeline is used during the start of the business process workflow. For example, an organization deals with sales orders that sometimes contain hazardous materials. They have two separate pipelines, one in which orders with order lines without any hazardous materials go through and one in which orders with order lines containing hazardous materials must go through for inspection before continuing through the order process. The organization uses pipeline determination to set up a condition that determines whether or not order lines contain hazardous materials and sends the order line down the correct pipeline.

For more information about Pipeline Determination, see *Yantra 7x Platform Configuration Guide*.

### 5.5.4.2 Hub Rule

When you expand the Pipeline Determination branch, the components displayed depends on what role you are logged in as. If you are logged in as a Hub role, the Hub Rule is displayed. If you are logged in as an Enterprise role, both the Hub Rule and all user created determination rules (For example, My Rule) components are displayed. Double-click on the applicable rule to display the pipeline determination rules.

---

---

**Note:** If you are logged in as an Enterprise role, the Hub Rule screen is grayed out and cannot be modified.

---

---

Drag conditions and pipelines into the work area to construct pipeline determination rules. A single pipeline or condition must be the root. Conditions cannot link back to an earlier component in the chain and a pipeline cannot be linked to twice.

---

**Note:** When configuring pipeline determination for an order document type pipeline, please note that pipeline determination is only considered when adding a line or creating an order. When changes are made to draft orders pipeline determination does not occur.

---

### 5.5.4.3 Condition Variables for Pipeline Determination

When using conditions for pipeline determination, the following condition variables can be used:

- Document Type
- Enterprise Code
- Seller Organization Code
- Ship Node
- Buyer Organization Code
- Receiving Node
- Receiving Node Interface Type
- Ship Mode
- Freight Terms
- Carrier Type
- Is Hazardous Material
- Is Inspection Pending
- Is Receiving Node Integrated Real Time

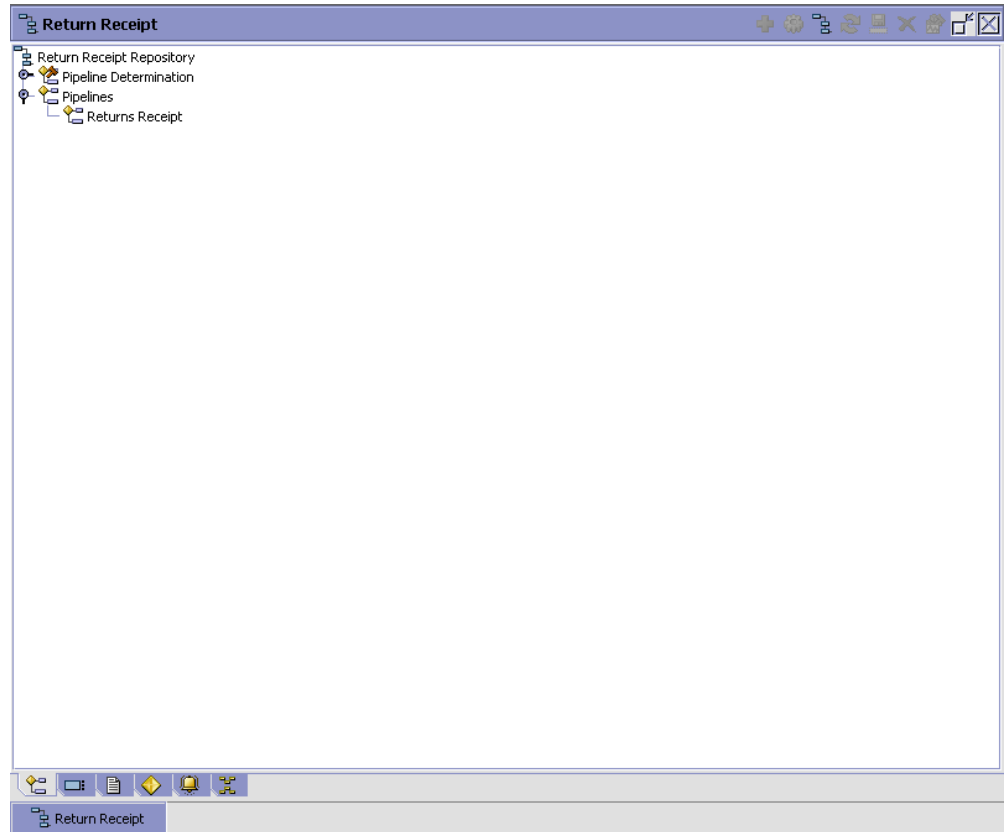
For more information about Pipeline Determination and Hub Rule, see *Yantra 7x Platform Configuration Guide*.

### 5.5.4.4 Pipelines

For more information about Pipelines, see *Yantra 7x Platform Configuration Guide*.

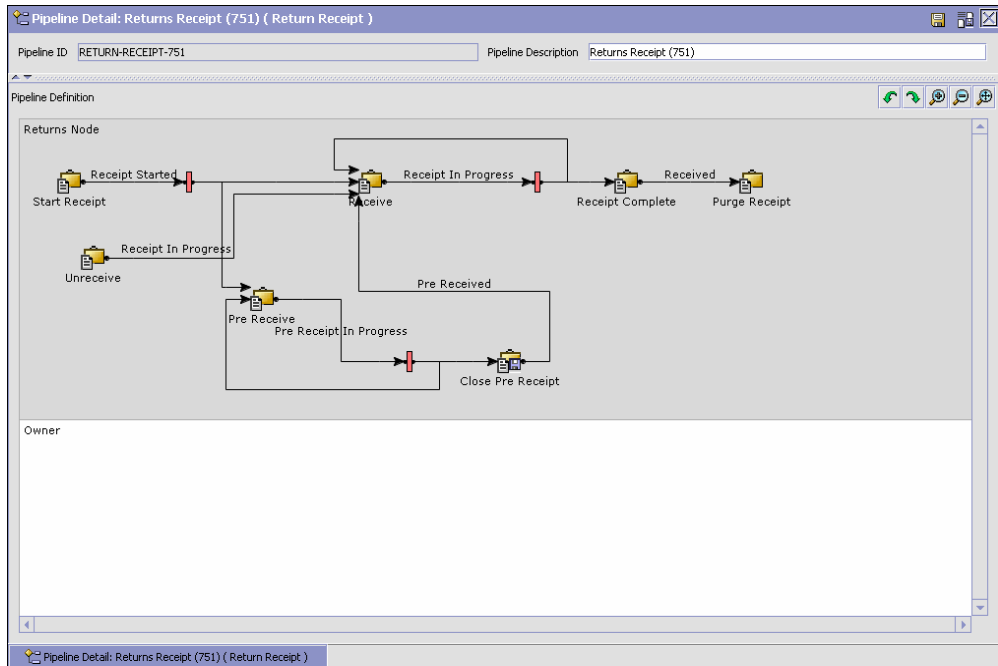
To view the return receipt pipeline details:

1. From the tree in the application rules side panel, choose Receiving > Document Specific > Return Order > Receipt Process Model. The Return Receipt window is displayed.



2. In the Return Receipt window, choose Return Receipt Repository > Pipelines > Returns Receipt.
3. The Pipeline Detail: Returns Receipt (Return Receipt) window is displayed.

For more information about creating and modifying a Pipeline, see the *Yantra 7x Platform Configuration Guide*.




### 5.5.4.5 Transactions

Every process type has a set of base transactions defined for it. A transaction is a logical unit of work that is necessary for performing activity within Yantra 7x. Base transactions are predefined transactions that contain information about how the transaction behaves, such as how many copies of a transaction can be kept in a process type and whether or not it can have configurable base pick and drop statuses. Base transactions can be used to create new transactions. These transactions can be changed within the limits defined in the base transaction.

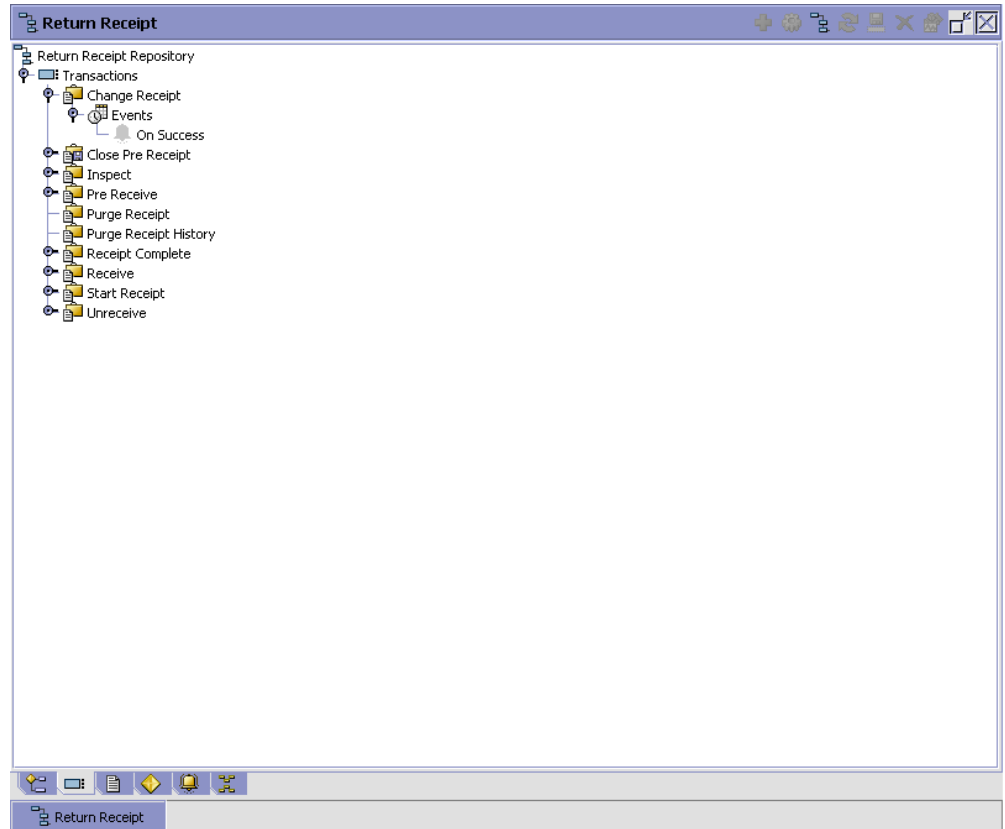
For more information about Transactions, see *Yantra 7x Platform Configuration Guide*.

To view the transaction details for a return receipt pipeline:

1. From the tree in the application rules side panel, choose **Receiving > Document Specific > Return Order > Receipt Process Model**. The Return Receipt window is displayed.

2. In the Return Receipt window, choose .
3. The Transactions tab window is displayed.

For more information about creating and modifying Transactions, see *Yantra 7x Platform Configuration Guide*.



**Table 5–33 Return Receipt Pipeline - Transactions Tab Window**


Field	Description
Change Receipt	This transaction represents the receipt details being modified after a receipt for a shipment is recorded.
Close Pre Receipt	<p>This transaction represents the closure of pre-receipts for a shipment.</p> <p>Pre-receipt allows a warehouse to indicate the receipt of containers for a shipment. The visibility provided to the other departments allows for exception handling. For example, during item shortage in the pick areas, supervisors monitor incoming shipments to request for emergency receipt of a particular shipment.</p>
Inspect	This transaction represents the step of inspecting a shipment. This is required to complete the disposition of product received.
Pre Receive	This transaction represents a shipment may be pre-received before it is actually received in the warehouse.
Purge Receipt	<p>This transaction represents a shipment that may be purged (moved out of) from primary transactional tables to the history tables.</p> <p>For more information about purge criteria, see <a href="#">Section 12.8, "Defining Purge Criteria"</a> on page 930.</p>
Purge Receipt History	<p>This transaction represents a shipment may now be purged (moved out of) from the history tables.</p> <p>For more information about purge criteria, see <a href="#">Section 12.8, "Defining Purge Criteria"</a> on page 930.</p>
Receipt Complete	This transaction represents the completion of receipt of a shipment. It is invoked automatically from receipt screens or manually from a console or through the close receipt agent.
Receive	This transaction represents receipt of product on a shipment.
Start Receipt	This transaction represents the opening of a receipt for shipment. This is invoked either manually from a console or automatically invoked from consoles or RF.
Unreceive	This transaction represents the correction of received quantity against a shipment.

### 5.5.4.6 Statuses

**Statuses** are the actual states that a document moves through in the pipeline. A transaction can contain two types of statuses, a drop status and a pickup status. A document is moved into a **drop status** when the events and conditions of a transaction have been completed. A **pickup status** takes the document from the previous drop status and moves it through the next transaction. Created and Scheduled are examples of statuses.

For more information about Statuses, see *Yantra 7x Platform Configuration Guide*.

To view the status details of a return receipt pipeline:

1. From the tree in the application rules side panel, choose Receiving > Document Specific > Return Order > Receipt Process Model. The Return Receipt window is displayed.
2. In the Return Receipt window, choose .
3. The Statuses tab window is displayed.

For more information about creating and modifying Statuses, see *Yantra 7x Platform Configuration Guide*.

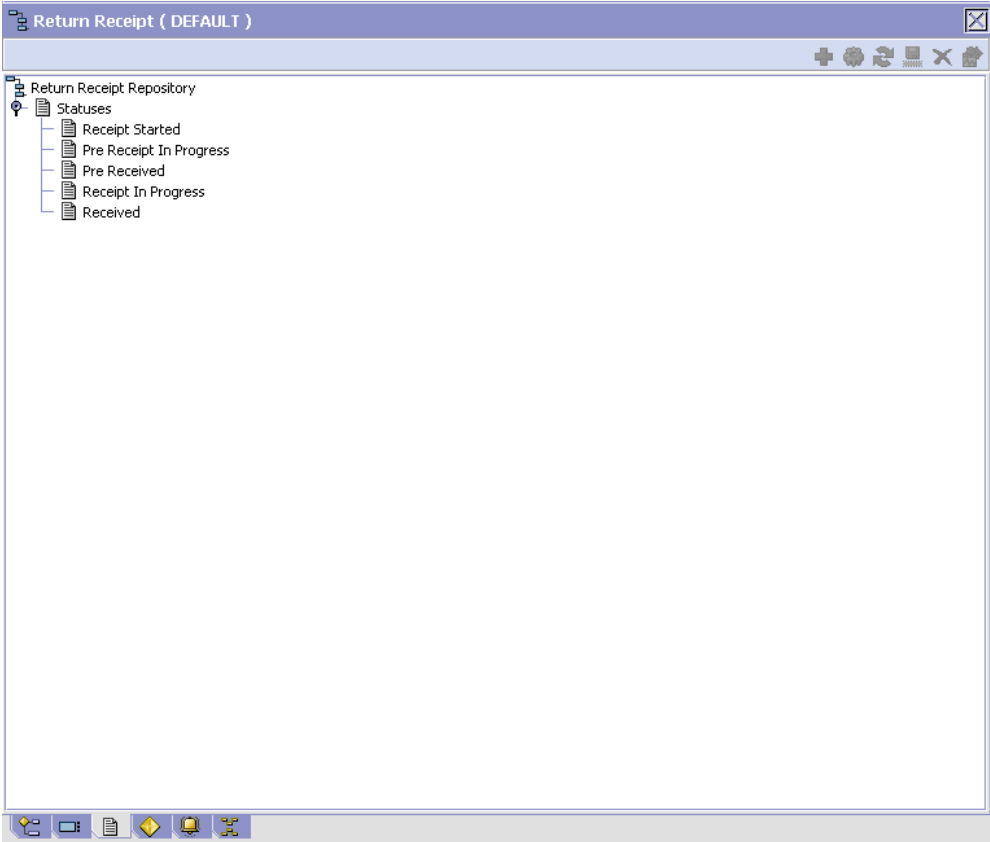


Table 5–34 Return Receipt Pipeline - Statuses Tab Window

Field	Description
Receipt Started	This indicates that the shipment is opened for receipt. This corresponds to 'Start Receipt' transaction.
Pre Receipt In Progress	This indicates that pre-receipt for the shipment is in progress. This corresponds to 'Pre-receive' transaction.



**Table 5–34 Return Receipt Pipeline - Statuses Tab Window**


Field	Description
Pre Received	This indicates that pre-receipt process for the shipment is completed. This corresponds to 'Close-PreReceipt' transaction.
Receipt In Progress	This indicates that receiving for the shipment is in progress. This corresponds to 'Receive' or 'Un-Receive' transactions.
Received	This indicates that receipt for the shipment is completed. This corresponds to 'Receipt Complete' transaction.

#### 5.5.4.7 Conditions

A **condition** matches document type attributes against decision points and routes the documents to different paths based on the specified attribute and value combinations. The document type attributes against which conditions can be created are predefined in Yantra 7x. You can use these attributes in any combination or you can create conditions that execute the appropriate application logic for specific circumstances.

For more information about Conditions, see *Yantra 7x Platform Configuration Guide*.

To view the condition details of a return receipt pipeline:

1. From the tree in the application rules side panel, choose Receiving > Document Specific > Return Order > Receipt Process Model. The Return Receipt window is displayed.
2. In the Return Receipt window, choose .
3. The Conditions tab window is displayed.

For more information about creating and modifying Conditions, see *Yantra 7x Platform Configuration Guide*.

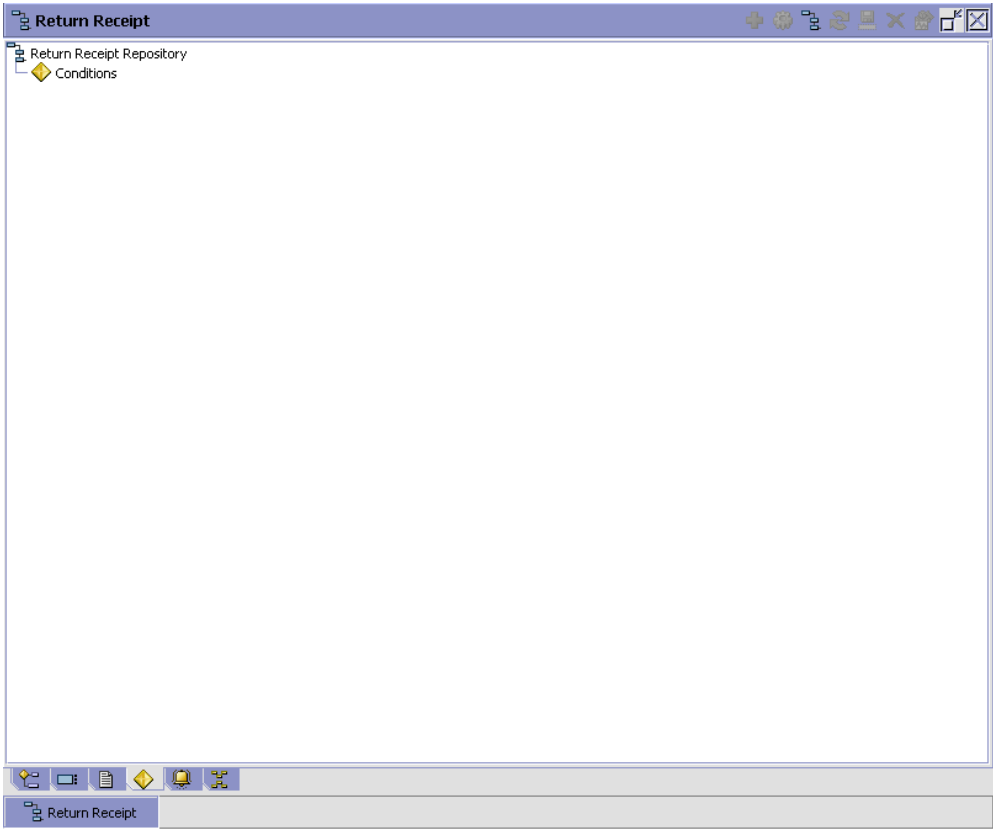


Table 5–35 Return Receipt Pipeline - Conditions Tab Window

Field	Description
Conditions	Displays conditions that are specific to the returns receipt pipeline, if any.

Yantra 7x WMS default pipeline does not have any conditions specified.


### 5.5.4.8 Actions

An **action** is a process or program that is triggered by an event. These processes and programs send user alert notifications and automatically resolve issues.

For example, when an order is released (the event), you can set an action to send the customer an e-mail.

For more information about Actions, see *Yantra 7x Platform Configuration Guide*.

To view the action details of a return receipt pipeline:

1. From the tree in the application rules side panel, choose Receiving > Document Specific > Return Order > Receipt Process Model. The Return Receipt window is displayed.
2. In the Return Receipt window, choose .
3. The Actions tab window is displayed.

For more information about creating and modifying Actions, see *Yantra 7x Platform Configuration Guide*.

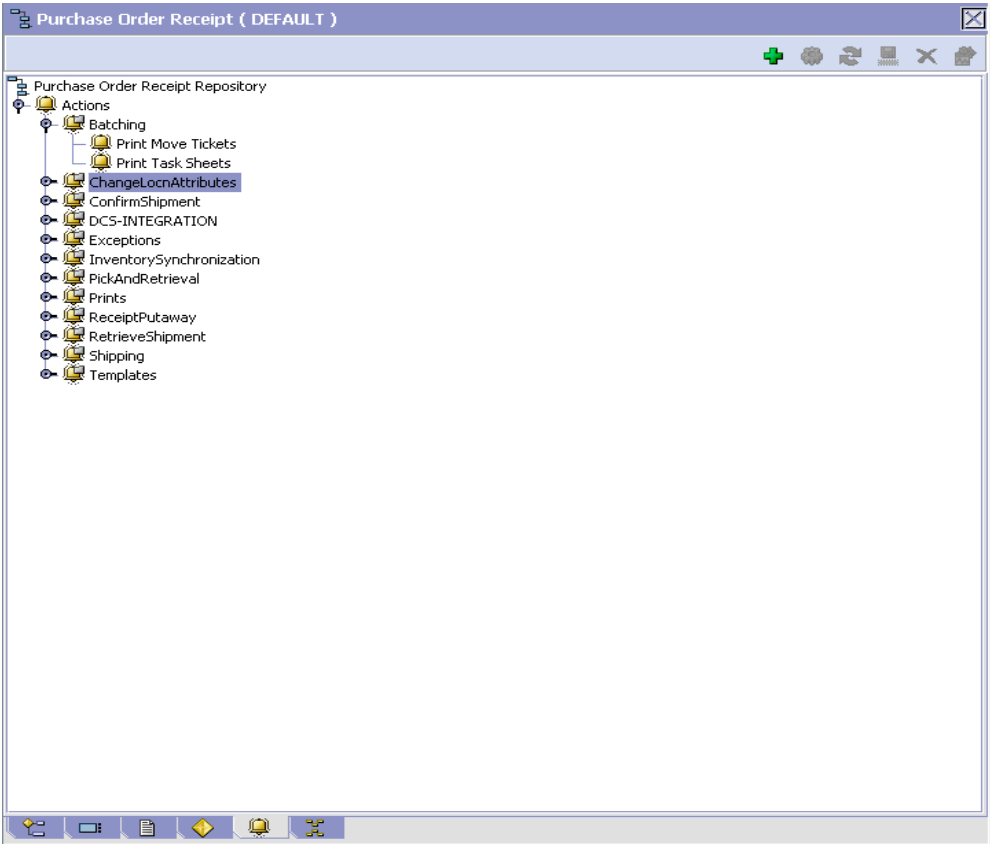


Table 5–36 Return Receipt Pipeline - Actions Tab Window

Field	Description
Batching	Default settings are provided for: <b>Print Move Tickets</b> – Invokes the batch printing service for printing the move tickets. <b>Print Task Sheets</b> – Invokes the batch print service for printing the task sheets.
ChangeLocnAttributes	

**Table 5–36 Return Receipt Pipeline - Actions Tab Window**

Field	Description
ConfirmShipment	Default settings are provided for: <b>ConfirmShipment</b> – Invokes the confirmShipment flow to confirm the shipment.
DCS-Integration	Default settings are provided for: <b>InventoryDownload</b> – Invokes the YantraWMSInventoryDownloadService service to download the inventory information from Yantra 7x to Yantra DCS. <b>PODownload</b> – Invokes the YantraWMSPODownloadService service to download the Purchase Order information from Yantra 7x to Yantra DCS.
Exceptions	Default settings are provided for: <b>ShortagesDetected</b> – Invokes the LogWavePlaFailure exception service when shortage of inventory occurs during wave release.
InventorySynchronization	Default settings are provided for: <b>CollectInventoryMismatch</b> – This service collects the inventory mismatch information between an external system and Yantra 7x. This is typically caused when some inventory updates at a node or a warehouse are not reported to Yantra 7x.
PickAndRetrieval	Default settings are provided for: <b>ConfirmEmptyLocationAfterPick</b> – Invokes the GenerateCountRequest flow which creates a count request.

*Table 5–36 Return Receipt Pipeline - Actions Tab Window*

Field	Description
Prints	<p>Default settings are provided for:</p> <p><b>PickList Print</b> – Invokes the print service for printing the Pick List.</p> <p><b>LTl Manifest</b> – Invokes the print service for printing the Less-than Truck Load Manifest.</p> <p><b>Print Load BOL</b> – Invokes the print service for printing the Load Bill of Lading.</p> <p><b>Print PackList</b> – Invokes the print service for printing the Pack List.</p> <p><b>Print Post Pick Container Labels</b> – Invokes the print service for printing UCC-128 container labels for containers, when system defined packing process is used.</p> <p><b>Print Shipment BOL</b> – Invokes the print service for printing the Shipment Bill of Lading.</p> <p><b>Print Shipping Label</b> – Invokes the print service for printing the UCC-128 container labels.</p> <p><b>Print Wave</b> – Invokes the Print service for printing a Wave.</p>
ReceiptPutaway	<b>Putaway products on receipt closure</b> – Indicates the default action provided to automatically initiate putaway of purchase order receipts.
RetrieveShipment	<b>Retrieve Requested Serial</b> – This service invokes the retrieveShipment API to retrieve the requested serials to the specified location.

**Table 5–36 Return Receipt Pipeline - Actions Tab Window**


Field	Description
Shipping	<p>Default settings are provided for:</p> <p><b>Load Left Origin</b> – Invokes the doLoadLeftOriginUpdates service to mark that the load has left the origin.</p> <p><b>Stop Shipping</b> – Invokes the RaiseStopShippingAlert service to raise an alert to stop the processing of the shipment.</p>
Templates	<p>Default settings are provided for:</p> <p><b>Log Exception</b> – Logs the reasons due to which a count request could not be created for a Count Program.</p> <p><b>Publish Data</b> – Sends data to external queue or internal tables.</p> <p><b>Raise Exception</b> – Raises an alert using Yantra 7x Event Management from the published information.</p> <p><b>Send Email</b> – Raises an email action to create an email in the template format from the published information.</p> <p><b>Send Email-HTML format</b> – Raises an email action to create an email in HTML format from the published information.</p>

#### 5.5.4.9 Service Definitions

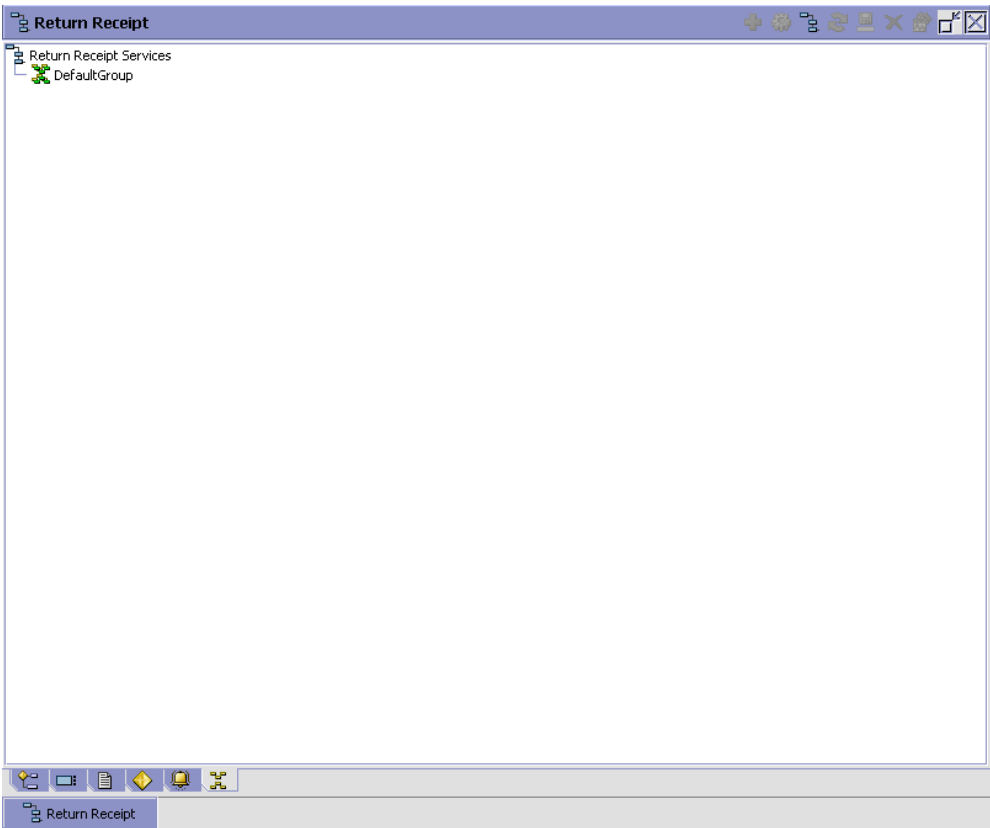
Service definitions are a representation of the logic that regulates document workflow services. The Service Builder is a graphical interface that enables you to create a graphical representation of these *services*.

For more information about Service Definitions, see *Yantra 7x Platform Configuration Guide*.

To view the service definition details of a return receipt pipeline:

1. From the tree in the application rules side panel, choose Receiving > Document Specific > Return Order > Receipt Process Model. The Return Receipt window is displayed.
2. In the Return Receipt window, choose .
3. The Service Definitions tab window is displayed.

For more information about creating and modifying Service Definitions, see *Yantra 7x Platform Configuration Guide*.



**Table 5–37   Return Receipt Pipeline - Service Definition Tab Window**

Field	Description
Default Group	Displays flows that are specific to the returns receipt pipeline.

Yantra 7x WMS default pipeline does not have any conditions specified.



## 5.5.5 Defining Receiving Preferences

The receiving preference configuration manages the receiving process of a warehouse.


A receiving preference identifies the characteristics of return shipments and provides guidelines to the execution transactions.

Use Receiving Preferences for:

- [Creating a Receiving Preference](#)
- [Modifying a Receiving Preference](#)

### 5.5.5.1 Creating a Receiving Preference

To create a receiving preference:

1. From the tree in the application rules side panel, choose Receiving > Document Specific > Return Order > Receiving Preferences.
2. The Receiving Preferences : Return Order window is displayed.
3. Enter information in the applicable fields. Refer [Table 5–38](#) for field value descriptions.
4. Choose .

Receiving Rules : Return Order : DEFAULT ( DEFAULT / MA03 )

Shipment entry allowed

Build Pallet

☒ Always

☐ Optional

☐ If Item Tag or Serial tracked

Build Case

☒ Always

☐ Optional

☐ If Item Tag or Serial tracked

Disposition Code

Receipt with QC

Receipt without QC

Preference for receipt closure by agent

☒ Unconditionally

☐ Received quantity at least equal to expected quantity

☐ After Put away completion

Vendor Preferences

Vendor	Vendor Classification	Item ID	Item Classification	Force Case Content entry	Requires QC
--------	-----------------------	---------	---------------------	--------------------------	-------------

Results 0

**Table 5–38 Receiving Preferences : Return Order Window**

Field	Description
Shipment Entry Allowed	<p>Select if shipment entry is to be created when a particular shipment is not available on the system.</p> <p>"Allow Shipment Entry" enables the system to automatically create a shipment entry in the system, if a shipment entry does not exist when a "Start Receipt" operation is performed.</p> <p>On creation and confirmation of the shipment, the "Include in Receipt" transaction is executed, to enable the receiving process to be carried out on this receipt.</p> <p>Warehouses that receive shipment information in fax or email form can manually enter the information into the system. This allows for enhanced tracking and visibility.</p>
<b>Build Pallet</b>	
Always	Select if building of a pallet is mandatory during the receipt process.
Optional	Select if building of a pallet is optional.
If Item Tag or Serial Tracked	Select if building of pallet is required for items that are tag or serial tracked.
<b>Build Case</b>	
Always	Select if building of case is mandatory during the receipt process.
Optional	Select if building of case is optional.
If Item Tag or Serial tracked	Select if building of case is required for items that are tag or serial tracked.
<b>Disposition Code</b>	
Receipt with QC	Choose the disposition code to associate with receipts for vendors or shipments that require QC.
Receipt without QC	Choose the disposition code to associate with receipts for vendors or shipment that do not require QC.
<b>Preference for Receipt Closure by Agent</b>	

**Table 5–38 Receiving Preferences : Return Order Window**

Field	Description
Unconditionally	Select if receipt closure by the agent occurs every time the closure agent is run.  This is typically used where receipts are closed as end-of-day process.
Received quantity at least equal to expected quantity	Select if receipt closure by the agent occurs when the received quantity is at least equal to the expected quantity.
After Putaway Completion	Select if receipt closure by the agent occurs after putaway is completed.  This applies to warehouses that indicate availability only when inventory is putaway to their storage locations.
<b>Vendor Preferences</b>	Populated automatically from vendor preferences in Yantra 7x Supply Collaboration.  The preferences are evaluated to determine the best preference. The preference with most matches to the order details is determined as the best preference.  For more information about Defining Customer Classifications, see <i>Yantra 7x Supply Collaboration Configuration Guide</i> .
Vendor	This indicates the vendor.  A vendor is defined as an external company that supplies materials that you order. You receive materials from your vendors. You are, in turn, vendors to your customers.
Vendor Classification	This indicates classification of the vendor.
Item ID	This indicates item ID.
Item Classification	This indicates the custom defined item storage definition.
Force Case Content entry	This indicates whether case content entry during receipt must be forced.
Requires QC	This indicates whether QC is required or not.

The closure of a shipment triggers the upload of receipt information to external HOST systems or updated in Yantra Supply Chain

Synchronization. For example, inventory availability for the shipment is moved from an in-transit to on-hand.

Vendor specific preferences, if any, configured as part of the Yantra 7x Supply Collaboration are displayed here. For more information, see *Yantra 7x Supply Collaboration Configuration Guide*.


Preferences for receiving a shipment are specified as a receiving preference for the ship node and enterprise level. A supervisor, may choose to override these preferences for a specific vendor. For example, a ship node requiring case content verification for most vendors. For a particular vendor a supervisor can override this requirement while manually creating shipment.

The feature of override is only relevant when the preference has been set forcing a granular activity. For example, override is not relevant for a ship node that does not require pallet content verification at a vendor level.

### 5.5.5.2 Modifying a Receiving Preference

Once a Receiving Preference has been created, it can be modified.

To modify a receiving preference:

1. From the tree in the application rules side panel, choose Receiving > Document Specific > Return Order > Receiving Preferences.
2. The Receiving Preferences : Return Order window is displayed with the list of existing rules.
3. Enter information in the applicable fields. Refer [Table 5–38](#) for field value descriptions.
4. Choose .

Any modification to a receiving preference is applied to all future transactions.

### 5.5.6 Defining Receiving Disposition

You can define common codes for receiving dispositions used when handling a receipt. This common code identifies what happens to items for the document type when they are received.

Use Receiving Disposition for:

- [Creating a Receiving Disposition](#)
- [Creating a New Receiving Disposition From an Existing Receiving Disposition](#)
- [Modifying a Receiving Disposition](#)
- [Deleting a Receiving Disposition](#)



### **5.5.6.1 Creating a Receiving Disposition**



To create a receiving disposition:

1. From the tree in the application rules side panel, choose Receiving > Document Specific > Return Order > Receiving Disposition.
2. The Receiving Disposition : Return Order window is displayed.

Receiving Disposition : Return Order ( DEFAULT )	
Receiving Disposition	Short Description
SENT FOR REPAIR	Sent For Repair
SCRAPPED	Scrapped
RESTOCKED	Restocked
TEST_DISP_OLD	Old Disposition
TEST_DISP_NEW	New Disposition

Results 5 Of 5

3. In the Receiving Disposition : Return Order window, choose . The Disposition Details pop-up window appears.
4. Enter information in the applicable fields. Refer [Table 5–39](#) for field value descriptions.
5. Choose .

Disposition Details


Receiving Disposition

SENT FOR REPAIR

Short Description



Sent For Repair

Product Class



☐ Damaged

☐ Final Disposition

Disposition Transitions

Receiving Disposition

\*

Results 0 Of 0

Table 5–39 Disposition Details Pop-up Window

Field	Description
Receiving Disposition	Enter the name of the receiving disposition.
Short Description	Enter a brief description of the receiving disposition.
Product Class	Select a product class to associate with received items, if applicable.  For example, you could assign the product class of Returned to any returned items.
Damaged	Select Is Damaged if the receiving disposition is used for handling damaged items.





**Table 5–39 Disposition Details Pop-up Window**

Field	Description
Final Disposition	Select Final Disposition if the receiving disposition is to be used as final disposition for the receipt.  Final Disposition marks the disposition code as final, and does not allow any further disposition transitions.
Disposition Transitions	<b>This displays the existing Receiving Disposition codes that are available for associating a transition with the Receiving Disposition being created or modified.</b>
Receiving Disposition	Existing Receiving Disposition Code available for transition association.

### 5.5.6.2 Creating a New Receiving Disposition From an Existing Receiving Disposition

To create a new receiving disposition from an existing receiving disposition:



1. From the tree in the application rules side panel, choose Receiving > Document Specific > Return Order > Receiving Disposition.
2. The Receiving Disposition : Return Order window is displayed with the list of Receiving Dispositions.
3. Choose the Receiving Disposition to be copied from. Choose . The Disposition Details pop-up window appears.
4. Enter information in the applicable fields. Refer [Table 5–39](#) for field value descriptions.
5. Choose .

### 5.5.6.3 Modifying a Receiving Disposition

Once a Receiving Disposition has been created, it may be modified.


To modify a receiving disposition:

1. From the tree in the application rules side panel, choose Receiving > Document Specific > Return Order > Receiving Disposition.
2. The Receiving Disposition : Return Order window is displayed with the list of Receiving Dispositions.

3. Select the Receiving Disposition to be modified. Choose . The Disposition Details pop-up window appears.
4. Enter information in the applicable fields. Refer [Table 5–39](#) for field value descriptions.
5. Choose .

### 5.5.6.4 Deleting a Receiving Disposition

To delete a receiving disposition:

1. From the tree in the application rules side panel, choose Receiving > Document Specific > Return Order > Receiving Disposition.
2. The Receiving Disposition : Return Order window is displayed with the list of Receiving Dispositions.
3. Select the Receiving Disposition to be deleted.
4. Choose .

## 5.5.7 Defining Disposition Codes

A disposition code identifies the product class and inventory status to be assigned to the inventory being received.

The valid list of disposition codes are typically managed as a central repository. The disposition code and description are automatically defaulted by the system for the appropriate type of order from the Reverse Logistics department, who typically own the disposition codes for the inventory. For more information, see *Yantra 7x Reverse Logistics Configuration Guide*.


Use Disposition Codes for:

- [Creating a Receiving Disposition Code](#)
- [Modifying a Receiving Disposition Code](#)

### 5.5.7.1 Creating a Receiving Disposition Code

To create a receiving disposition code:

1. From the tree in the application rules side panel, choose Receiving > Document Specific > Return Order > Disposition Codes.
2. The Disposition Code : Return Order window is displayed.

- 3. Enter information in the applicable fields. Refer [Table 5–40](#) for field value descriptions.
- 4. Choose .

Disposition Code : Return Order ( DEFAULT / MA03 )

Disposition Code	Description	Product Class	Inventory Status
SENT FOR REPAIR	Sent For Repair		
SCRAPPED	Scrapped		
RESTOCKED	Restocked		
TEST_DISP_OLD	Old Disposition	SFC	
TEST_DISP_NEW	New Disposition	SFC	

Results 5 Of 0

Disposition Code : Return Order ( DEFAULT / MA03 )

Table 5–40 Receiving Disposition Window

Field	Description
Disposition Code	The disposition code is displayed.
Description	The description associated with the disposition code is displayed.

**Table 5–40 Receiving Disposition Window**

Field	Description
Product Class	Indicates the product class for the disposition.
Inventory Status	Choose the inventory status for the disposition. This is a mandatory field, and needs to be entered.

Inventory is received into the specified product class and inventory status for the disposition code entered.


If the Product class is not specified, the product class from the purchase order or the default product class from the item is used. It is mandatory to have product class is specified at one of these levels.

The disposition codes allow inspectors to utilize their terminology, instead of understanding inventory and storage implications.

### 5.5.7.2 Modifying a Receiving Disposition Code

Once a Receiving Disposition Code has been created, it can be modified.

To modify a receiving disposition code:

1. From the tree in the application rules side panel, choose Receiving > Document Specific > Return Order > Disposition Codes.
2. The Disposition Code : Return Order window is displayed with the list of existing dispositions.
3. Enter information in the applicable fields. Refer [Table 5–40](#) for field value descriptions.
4. Choose .

*Only the inventory status associated with the disposition may be modified. The change of inventory status is applied to all future transactions.*

## 5.6 Defining Vendors

You can define trading vendors in the Receiving section of the module.

Use Vendor for:

- [Defining Vendor Classifications](#)

- [Defining Vendor Definition](#)

## 5.6.1 Defining Vendor Classifications

You can configure the vendor classification codes used to associate with a vendor identification master. For more information about creating a vendor identification master, see [Section 5.6.2, "Defining Vendor Definition"](#) on page 420.

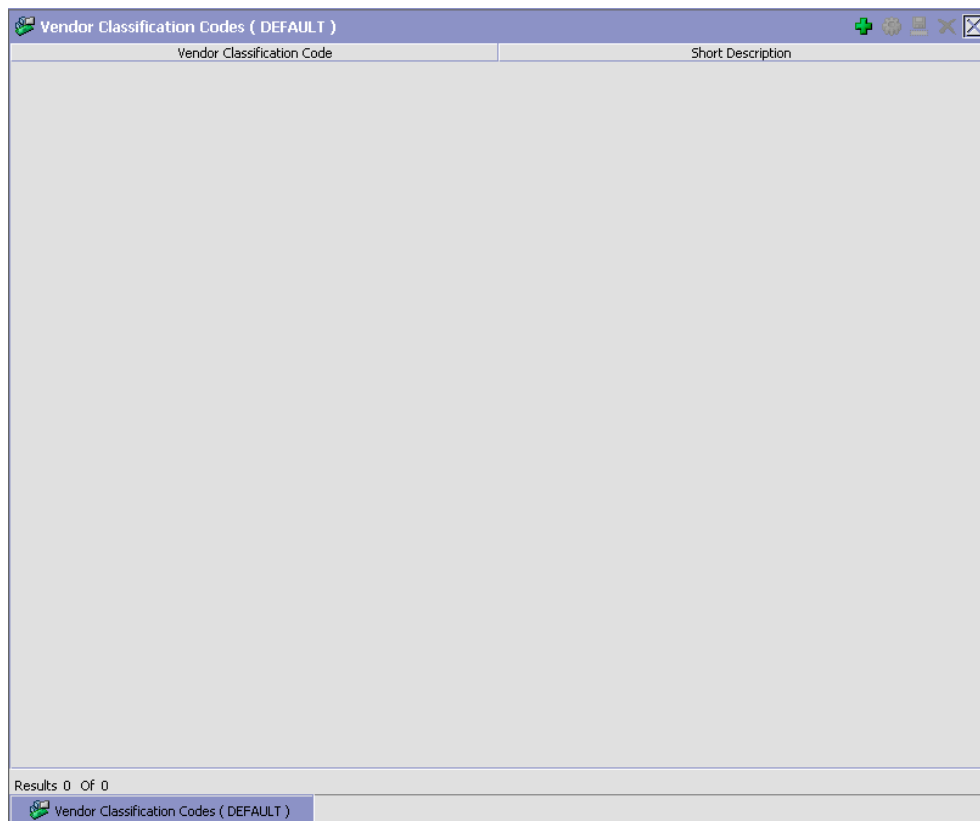
You can use the Vendor Classification branch for:


- [Creating a Vendor Classification](#)
- [Modifying a Vendor Classification](#)
- [Deleting a Vendor Classification](#)

### 5.6.1.1 Creating a Vendor Classification


To create a vendor classification:

1. From the tree in the application rules side panel, choose Receiving > Vendor > Vendor Classification. The Vendor Classification Codes window appears in the work area.





2. Choose . The Vendor Classification Code Details pop-up window appears.

The screenshot shows a software window titled "Yantra 7x Configurator" with a subtitle "Vendor Classification Code Details". Inside the window, there are three text input fields labeled "Vendor Classification Code", "Short Description", and "Long Description".

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


### 5.6.1.2 Modifying a Vendor Classification

To modify a vendor classification:

1. From the tree in the application rules side panel, choose Receiving > Vendor > Vendor Classification. The Vendor Classification Codes window appears in the work area.
2. Select the applicable vendor classification code and choose . The Vendor Classification Code Details pop-up window appears.
3. In Short Description, enter a brief description of the classification ID code.
4. In Long Description, enter a more detailed description of the classification ID code.
5. Choose .

### 5.6.1.3 Deleting a Vendor Classification

To delete a vendor classification:

1. From the tree in the application rules side panel, choose Receiving > Vendor > Vendor Classification. The Vendor Classification Codes window appears in the work area.
2. Select the applicable vendor classification code and choose .

### 5.6.2 Defining Vendor Definition

You can configure vendor definition used to establish a relationship between an organization and its Seller. When creating a vendor definition you associate an existing Seller organization with a specific vendor ID and classification. The vendor identification uniquely identifies the Seller organization in instances where multiple ERP systems download Seller information into Yantra 7x.

Use Vendor Definition for:

- [Creating a Vendor Definition](#)
- [Modifying a Vendor Definition](#)
- [Deleting a Vendor Definition](#)

#### 5.6.2.1 Creating a Vendor Definition

To create a vendor definition:

1. From the tree in the application rules side panel, choose Receiving > Vendor > Vendor Definition. The Vendor Search window appears in the work area.



Vendor Search ( DEFAULT )

Vendor ID  Seller Organization

Vendor Classification  Max Records

Search Results

Seller Organization	Vendor ID	Vendor Classification
Results 0 Of 0		

Vendor Search ( DEFAULT )

2. Choose . The Vendor pop-up window appears.
3. Enter information into the applicable fields. Refer to [Table 5–41](#) for field value descriptions.
4. Choose .

Table 5–41 Vendor Pop-Up Window




Field	Description
Vendor ID	Enter the unique ID.
Vendor Classification	Select the classification, if applicable.
Select An Existing Organization	Choose this and select the applicable Seller if you want to associate the vendor ID with an existing Seller organization.
Create A New Organization	Choose this if you want to create a new organization to associate with the vendor ID.
Organization Code	When creating a new organization, enter their organization code.
Organization Name	When creating a new organization, enter the organization's name.
This Organization Is Also A Ship Node	Select this if the new organization is also a ship node.
DUNS Number	When creating a new organization, enter the Seller's DUNS number.

**Table 5–41 Vendor Pop-Up Window**

Field	Description
Account Number With Hub	When creating a new organization, enter the Seller's account number with the Hub organization.
Locale	When creating a new organization, select the Seller's locale.



### 5.6.2.2 Modifying a Vendor Definition

To modify a vendor definition:

1. From the tree in the application rules side panel, choose Receiving > Vendor > Vendor Definition. The Vendor Search window appears in the work area.
2. Enter applicable search criteria and choose . A list of vendors is displayed.
3. Locate the applicable vendor and choose . The Vendor pop-up window appears.
4. From Vendor Classification, select the Seller's customer classification, if applicable.
5. From Seller Organization, select the Seller organization to associate with the vendor ID.
6. Choose .

### 5.6.2.3 Deleting a Vendor Definition

To delete a vendor definition:

1. From the tree in the application rules side panel, choose Receiving > Vendor > Vendor Definition. The Vendor Search window appears in the work area.
2. Enter applicable search criteria and choose . A list of vendors is displayed.
3. Locate the applicable vendor and choose .

## 5.7 Defining Location Storage Codes

A *Location Storage Code* indicates the storage classification for a location. Location storage code allows a warehouse to store all items of a given storage profile at the same location.

For example, inflammable items need to be stored separately in locations equipped to handle fire hazards. Marking all suitable locations with a certain storage code ensures that inflammable items are stored safely at these fireproof locations.

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**Note:** For more information about setting up Location Storage Codes, see [Section 3.3, "Defining Location Storage Codes"](#).

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## 5.8 Defining Zone Constraints

A zone in a warehouse is created to represent a group of locations. Zones may also be dedicated to specific inventory attributes or item attributes.

The constraints are specified at a item attribute, classification and enterprise level. The constraints specified applies to each individual location.

For example, a zone is restricted to a particular enterprise.

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**Note:** For more information about setting up zone constraints, see [Section 3.6, "Defining Zone Constraints"](#).

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## Configuring Quality Control

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The Quality Control process defines the system for ensuring the maintenance of proper standards in manufactured goods, especially by periodic random inspection of the product. Quality control process is integral to a warehouse where the standards of the products stored needs to be ascertained as they are received and also before they are despatched.

Use Quality Control for:

- [Defining Activities](#)
- [Defining Activity Constraints](#)
- [Defining Retrieval Strategy](#)
- [Defining Putaway Preferences](#)

### 6.1 Defining Activities

Activities in the warehouse are grouped into Activity Groups. Yantra 7x WMS provides a pre-defined set of activity groups for a warehouse. Examples of activity groups include Receiving, VAS, QC, Picking, and Packing.

Each activity group is associated with activity codes that define each activity that is performed. For example, receiving activity group has pre-receiving, quality control and receiving activities.

The list here is specific to the Quality Control process.


**Note:** Activity Codes and Activity Constraints may be defined only when the WMS tree is loaded for Node / Hub combination.

Use Activities for:

- [Creating an Activity Code](#)
- [Modifying an Activity Code](#)
- [Deleting an Activity Code](#)
- [Setting Up Activity Constraints for Single SKU](#)
- [Setting Up Activity Constraints for Multi-SKU/Multi-Level Container](#)
- [Setting Up Activity Constraints for Container with Unknown Contents](#)

### 6.1.1 Creating an Activity Code

To create an activity code:

1. From the tree in the application rules side panel, choose Quality Control > Activities. The Activities window is displayed.
2. Enter information in the applicable fields. Refer [Table 6–1](#) for field value descriptions.
3. Choose .

Activities ( DEFAULT )

Activity Group

Activity List

Activity Code	Description
INSPECTION	Inspection

\* (mouse cursor pointing at asterisk in left margin)

Results 1 Of 1

Activities ( DEFAULT )


**Table 6–1 Activities Window**

Field	Description
Activity Group	This is automatically populated by the system as 'INSPECTION'.
<b>Activity List</b>	
Activity Code	Enter a name for the activity code. Activity code is the unique identity of the activity.
Description	Enter a brief description for the activity code.

### 6.1.2 Modifying an Activity Code

Once an activity code has been created, it can be modified.


To modify an activity code:

1. From the tree in the application rules side panel, choose Quality Control > Activities. The Activities window is displayed, with the list of activities.
2. Enter information in the applicable fields. Refer [Table 6–1](#) for field value descriptions.
3. Choose .

*It is recommended that the Yantra 7x WMS provided list of activity codes are not modified.*

### 6.1.3 Deleting an Activity Code

To delete an activity code:

1. From the tree in the application rules side panel, choose Quality Control > Activities. The Activities window is displayed, with the list of activities.
2. Choose the Activity Code to be deleted.
3. Choose .

*It is recommended that the Yantra 7x WMS provided list of activity codes are not deleted.*

## 6.2 Defining Activity Constraints

Activities in the warehouse are performed based on attributes of the inventory being received. The attributes considered are single SKU inventory, multi-SKU inventory and container.

Use Activity Constraint set-up for:

- [Setting Up Activity Constraints for Single SKU](#)
- [Setting Up Activity Constraints for Multi-SKU/Multi-Level Container](#)
- [Setting Up Activity Constraints for Container with Unknown Contents](#)



## 6.2.1 Setting Up Activity Constraints for Single SKU


The constraints for the activity of a single SKU are specified here.

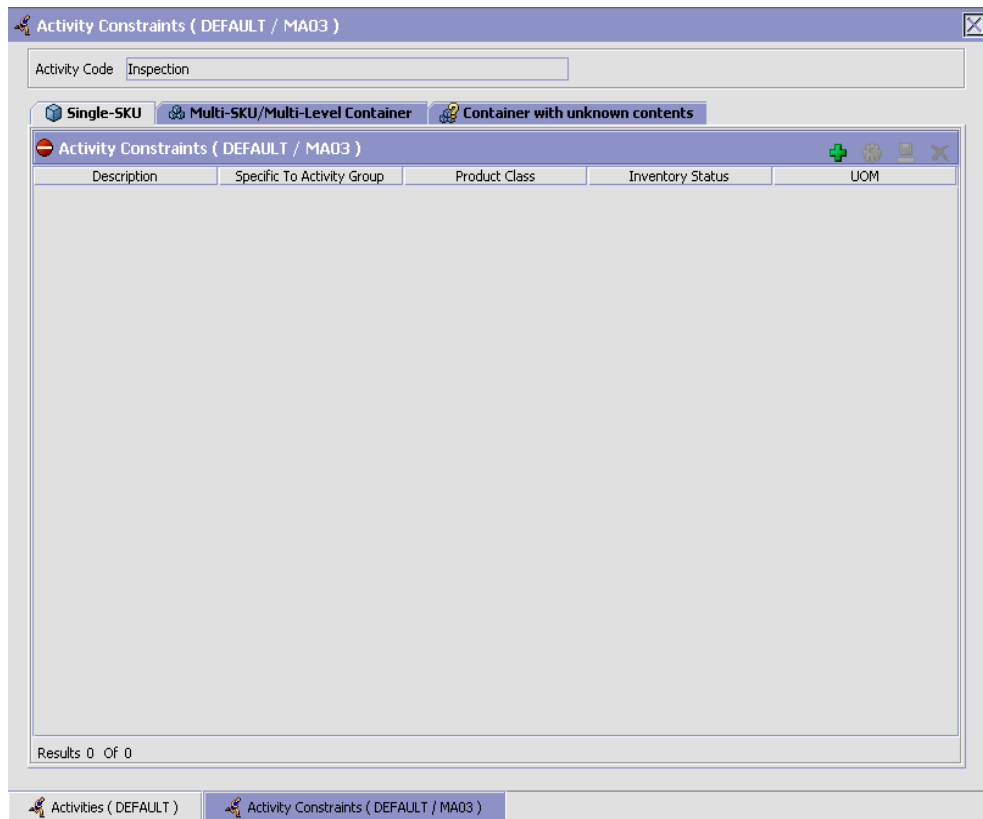
Use Activity Constraint set-up for:



- [Creating an Activity Constraint for Single SKU](#)
- [Creating a New Activity Constraint for Single SKU from an Existing Activity Constraint](#)
- [Modifying an Activity Constraint for Single SKU](#)
- [Deleting an Activity Constraint for Single SKU](#)

### 6.2.1.1 Creating an Activity Constraint for Single SKU


To create an activity constraint for single SKU:

1. From the tree in the application rules side panel, choose Quality Control > Activities. The Activity Search window is displayed, with the list of activities.
2. Choose the Activity Code whose Activity Constraint is to be set up.
3. Choose . The Activity Constraints window is displayed.
4. In the Activity Constraints window, choose the Single-SKU tab. The Single-SKU tab window for Activity Constraints is displayed.



5. In the Single-SKU tab window, choose . The Activity Constraint Details window is displayed.
6. Enter information in the applicable fields. Refer [Table 6–2](#) for field value descriptions.
7. Choose .

**Activity Constraint Details ( DEFAULT / MA03 ) : Single-SKU**

Description  To View Strategy Click here 

Activity Code  Requesting Activity Group

Product Class  Inventory Status

Segment Type  Segment

UOM  Container Type

Item Classification


**Location Priorities**

	Priority	Location
*		


Results 0 Of 0

Activities ( DEFAULT )   Activity Constraints ( DEFAULT / MA03 )   **Activity Constraint Details ( DEFAULT / MA03 ) : Single-SKU**

**Table 6–2 Activity Constraint Details - Single-SKU Tab Window**

Field	Description
Description	Enter a description for the activity constraint.
To View Strategy Click here	Choose  to view or set up Putaway Strategy. For more details on setting up a putaway strategy see <a href="#">Setting Up Putaway Strategy for Single-SKUs</a> . Note: Putaway strategy may be specified for the putaway preferences after the preference is saved.
Activity Code	This indicates the activity code for the constraint.

**Table 6–2 Activity Constraint Details - Single-SKU Tab Window**

Field	Description
Requesting Activity Group	Choose the requesting activity group. Typical values are Receipt, Packing, and Value Added Services.
Product Class	Choose the product class for the constraint, if applicable.  Product class is the inventory classification of an item based on product's characteristics. Typical values are FQ - First Quality, SQ - Second Quality, etc.
Inventory Status	Choose the inventory status for the constraint, if applicable.  Inventory status refers to an inventory sub classification based on the results of the inventory control processes within the warehouse.
Segment Type	Choose the segment type for the constraint, if applicable.  This indicates an inventory category. Typical values are MTC – Made to Customer, and MTO - Made to Order.
Segment #	Enter the segment number for the constraint, if applicable.  A segment holds either the specific buyer or specific order number that requires dedication.
UOM	Choose the UOM for the constraint, if applicable. UOM points to the Unit of measure of the item.
Container Type	The Container type associated with the UOM selected is displayed. Typical values are "Pallet" and "Case".
<b>Item Classification</b>	<b>List of putaway item classifications for the Enterprise are displayed. An example, Product Line is shown below.</b>
Product Line	Choose relevant product line item classification for the putaway activity.  Choose  . In the Classification window, select the applicable product line classification.
<b>Location Priorities</b>	


**Table 6–2 Activity Constraint Details - Single-SKU Tab Window**

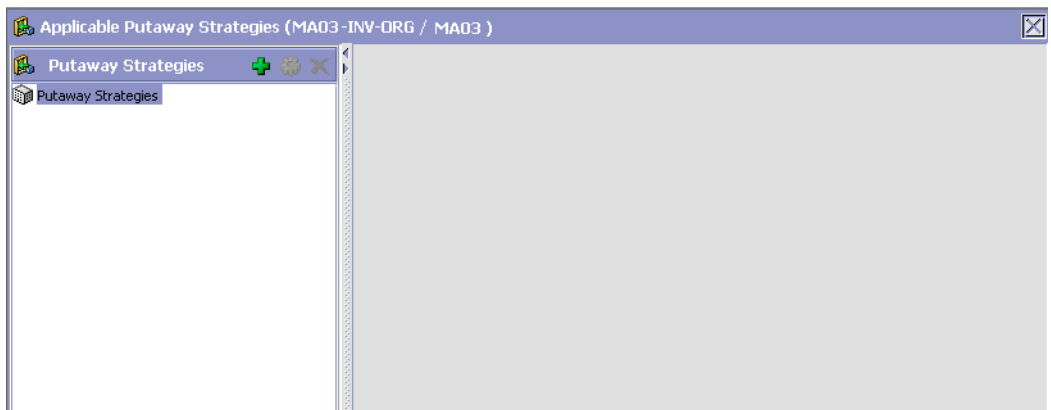
Field	Description
Priority	<p>Enter a number to represent the priority.</p> <p>The priority is used to sequence the order in which the location priorities are evaluated. For example, all storage code level priorities are to be evaluated first before generic priorities.</p> <p>The priority needs to be a positive integer, greater than zero. This is a mandatory field.</p>
Location	<p>Choose the relevant location for the activity.</p> <p>This is a mandatory field.</p>


### Setting Up Putaway Strategy for Single-SKUs


You can set up putaway strategies to putaway applicable inventory from a source zone to a target zone, based on the strategy specified.

To set up putaway strategy for single-SKUs:

1. In the Activity Constraint Details : Single SKU window, choose .
2. The Applicable Putaway Strategies window is displayed.



3. Choose  in the Putaway Strategies panel. The Putaway Strategy Details window appears in the right panel.
4. Enter information in the applicable fields. See the Putaway Strategy Details Window table for field value descriptions.

5. Choose .

Putaway Strategy Details

Description

Strategy for DVD-LockAndKey-EACH

UOM

CASE

Item Classification

Product Line

DVD

StorageType

LockAndKey

Product Line

System Directed Putaway Task Types

	Source Zone	Target Zone	Container Type	Task Type
*				




Results 0 Of 0

Ad Hoc Task Types

	Source Zone	Target Zone	Container Type	Task Type
*				

Results 0 Of 0

**Table 6–3 Putaway Strategy Details Window**




Field	Description
Description	Enter a description for the Putaway Strategy.
UOM	Select the UOM for the Putaway Strategy, if applicable. Note: The UOM will be defaulted in instances where it has been specified in the Putaway Preference Details screen.
<b>Item Classification</b>	List of putaway item classifications for the Enterprise are displayed. An example, Product Line is shown below.
Product Line	Choose relevant product line item classification for the putaway activity.  Choose  . In the Classification Values window, select the applicable product line classification.
<b>System Directed Putaway Task Types</b>	<b>Displays the list of existing system directed putaway task types.</b>  <b>You may use  to delete an existing system directed putaway task type.</b>
Source Zone	Select the source zone where inventory is available.
Target Zone	Select the target zone where you want to move the inventory.
Container Type	Select the container type to be used to move the inventory from the source zone to the target zone. Typical values are Case and Pallet.
Task Type	Select the Putaway Task Type applicable to this putaway strategy. This field displays the list of existing system directed task types that belong to the 'PUTAWAY' activity group.
<b>Ad hoc Task Types</b>	<b>Displays the list of existing ad hoc task types.</b>  <b>You may use  to delete an existing ad hoc task type.</b>
Source Zone	Select the source zone where inventory is available.
Target Zone	Select the target zone where you want to move the inventory.

**Table 6–3 Putaway Strategy Details Window**

Field	Description
Container Type	Select the container type to be used to move the inventory from the source zone to the target zone. Typical values are Case and Pallet.
Task Type	Select the Putaway Task Type applicable to this putaway strategy. This field displays the list of existing ad hoc task types that belong to the 'PUTAWAY' activity group.

### 6.2.1.2 Creating a New Activity Constraint for Single SKU from an Existing Activity Constraint

To create a new activity constraint for single SKU from an existing activity constraint:




1. From the tree in the application rules side panel, choose Quality Control > Activities. The Activity Search window is displayed, with the list of activities.
2. Choose the Activity Code whose Activity Constraint is to be set up.
3. Choose . The Activity Constraints window is displayed.
4. In the Activity Constraints window, choose the Single-SKU tab. The Single-SKU tab window for Activity Constraints is displayed.
5. In the Single-SKU tab window, choose the activity constraint that is to be copied from.
6. Choose . The Activity Constraint Details window is displayed.
7. Enter information in the applicable fields. Refer [Table 6–2](#) for field value descriptions.
8. Choose .

### 6.2.1.3 Modifying an Activity Constraint for Single SKU

To modify an activity constraint for single SKU:



1. From the tree in the application rules side panel, choose Quality Control > Activities. The Activity Search window is displayed, with the list of activities.
2. Choose the Activity Code whose Activity Constraint is to be modified.



3. Choose . The Activity Constraints window is displayed.
4. In the Activity Constraints window, choose the Single-SKU tab. The Single-SKU tab window for Activity Constraints is displayed.
5. In the Single-SKU tab window, choose the activity constraint that is to be modified.
6. Choose . The Activity Constraint Details window is displayed.
7. Enter information in the applicable fields. Refer [Table 6–2](#) for field value descriptions.
8. Choose .

#### 6.2.1.4 Deleting an Activity Constraint for Single SKU

To delete an activity constraint for single SKU:

1. From the tree in the application rules side panel, choose Quality Control > Activities. The Activity Search window is displayed, with the list of activities.
2. Choose the Activity Code whose Activity Constraint is to be deleted.
3. Choose . The Activity Constraints window is displayed.
4. In the Activity Constraints window, choose the Single-SKU tab. The Single-SKU tab window for Activity Constraints is displayed.
5. In the Single-SKU tab window, choose the activity constraint that is to be deleted.
6. Choose .

### 6.2.2 Setting Up Activity Constraints for Multi-SKU/Multi-Level Container

The constraints for the activity of a multi-level case or pallet are specified here. This also applies to multi-level CASE with LPN and PALLET with LPN.


Use the Activity Constraints for Multi-SKU/Multi-Level Container set-up for:

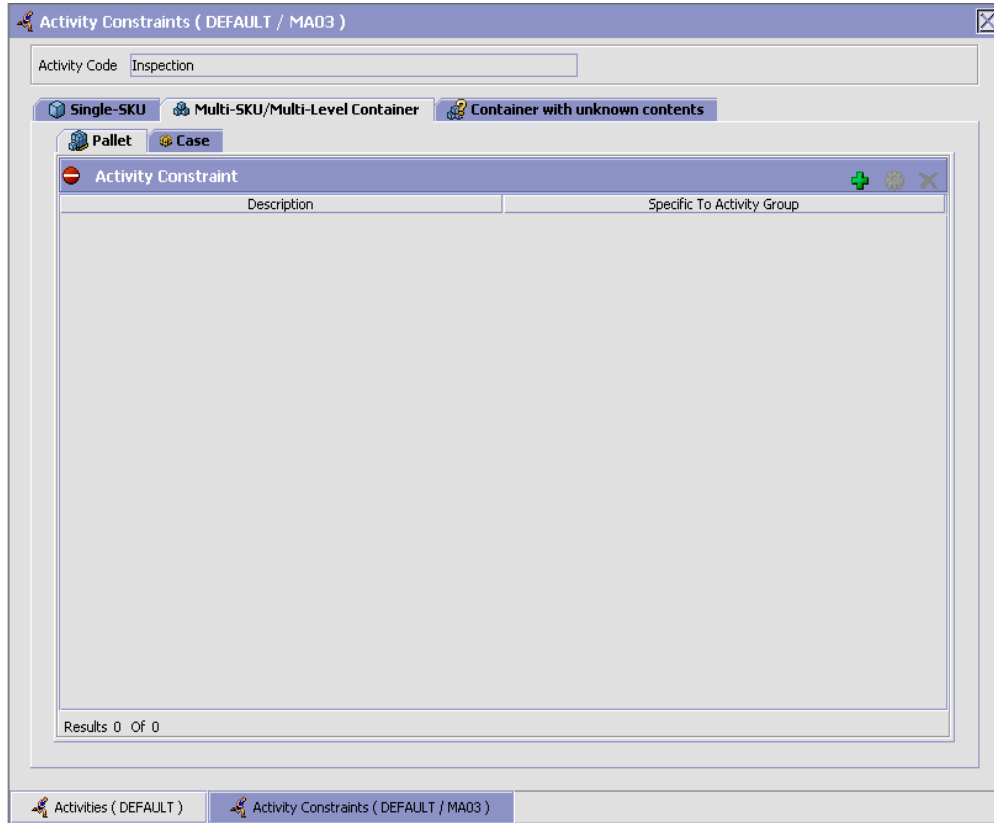
- [Creating an Activity Constraint for Multi-SKU/Multi-Level Container](#)
- [Modifying an Activity Constraint for Multi-SKU/multi-level Container](#)

- [Deleting an Activity Constraint for Multi-SKU/Multi-Level Container](#)

### 6.2.2.1 Creating an Activity Constraint for Multi-SKU/Multi-Level Container

To create an activity constraint for multi-SKU/multi-level container:

1. From the tree in the application rules side panel, choose Quality Control > Activities. The Activity Search window is displayed, with the list of activities.
2. Choose the Activity Code whose Activity Constraint is to be set up.
3. Choose . The Activity Constraints window is displayed.





Activity Constraints for multi-level cases or pallets are specified separately:

- [Setting Up Activity Constraints for Multi-Level Pallets](#)
- [Setting Up Activity Constraints for Multi-Level Cases](#)

#### 6.2.2.1.1 Setting Up Activity Constraints for Multi-Level Pallets

To set up activity constraints for multi-level pallets:

1. In the Multi-SKU/Multi-Level Container tab of Activity Constraints window, choose the Pallet tab. The Pallet tab window is displayed.
2. In the Pallet tab window, choose .
3. The Activity Constraint Details window appears.
4. Enter information in the applicable fields. Refer [Table 6–4](#) for field value descriptions.
5. Choose .

Activity Constraint Details ( DEFAULT / MA03 ) : Multi-SKU/Multi-Level Container : Pallet

Description

To View Strategy Click here

Activity Code

Inspection

Requesting Activity Group

☐

Putaway each SKU separately for Multi-SKU Pallets

Location Priorities

	Priority	Location
*		


Results 0 Of 0

Activities ( DEFAULT )

Activity Constraints ( DEFAULT / MA03 )

Activity Constraint Details ( DEFAULT / M...

Table 6–4 Activity Constraint Details - Multi-Level Pallet Tab

Field	Description
Description	Enter a description for the activity constraint.
To View Strategy Click here	<p>Choose  to view or set up Putaway Strategy. For more details on setting up a putaway strategy see <a href="#">Setting Up Putaway Strategy for Multi-SKU/Multi-Level Containers - Pallets</a>.</p> <p>Note: Putaway strategy may be specified for the putaway preferences after the preference is saved.</p>
Activity Code	This indicates the activity code for the constraint.


**Table 6–4 Activity Constraint Details - Multi-Level Pallet Tab**

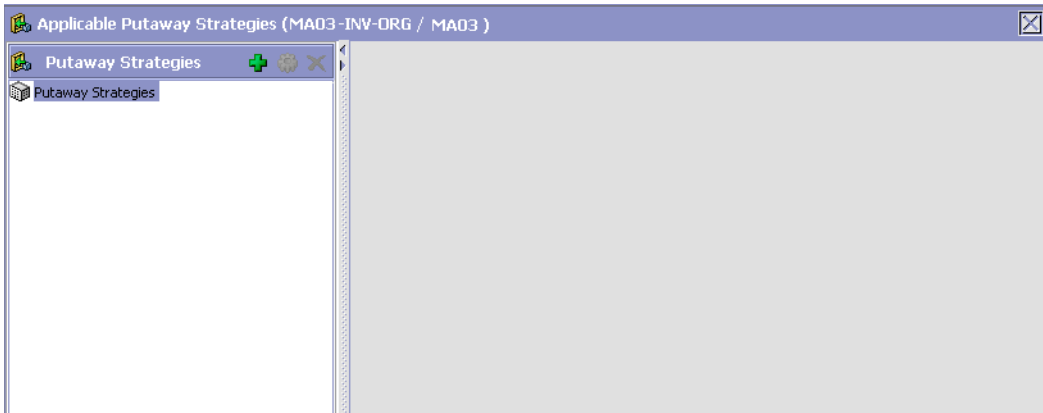
Field	Description
Requesting Activity Group	Choose the requesting activity group. Typical values are Receipt, Packing, and Value Added Services.
Putaway each SKU separately for Multi-SKU Pallets	Select if each SKU on the multi-SKU pallet is evaluated individually. If selected, the activity constraint for single SKU is evaluated for the multi-SKU pallet. The Zone Priorities Panel is removed on this selection.
<b>Location Priorities</b>	
Priority	Enter a number to represent the priority. The priority is used to sequence the order in which the location priorities are evaluated. For example, all storage code level priorities are to be evaluated first before generic priorities. The priority needs to be a positive integer, greater than zero. This is a mandatory field.
Location	Choose the relevant location for the activity. This is a mandatory field.



### Setting Up Putaway Strategy for Multi-SKU/Multi-Level Containers - Pallets

You can set up putaway strategies to putaway applicable inventory from a source zone to a target zone, based on the strategy specified.

To set up putaway strategy for multi-SKU/multi-level container pallets:

1. In the Activity Constraint Details : Multi-SKU/multi-level Containers : Pallet window, choose .
2. The Applicable Putaway Strategies window is displayed.



3. Choose  in the Putaway Strategies panel. The Putaway Strategy Details window appears in the right panel.
4. Enter information in the applicable fields. See the Putaway Strategy Details Window table for field value descriptions.
5. Choose .

**Putaway Strategy Details**

Description: Strategy for DVD-LockAndKey-EACH UOM: CASE

Item Classification

Product Line: DVD

StorageType: LockAndKey

Product Line:

---

**System Directed Putaway Task Types**

	Source Zone	Target Zone	Container Type	Task Type
*				

Results 0 Of 0

---

**Ad Hoc Task Types**




	Source Zone	Target Zone	Container Type	Task Type
*				

Results 0 Of 0

**Table 6–5 Putaway Strategy Details Window**

Field	Description
Description	Enter a description for the Putaway Strategy.
UOM	Select the UOM for the Putaway Strategy, if applicable. Note: The UOM will be defaulted in instances where it has been specified in the Putaway Preference Details screen.

**Table 6–5 Putaway Strategy Details Window**

Field	Description
<b>Item Classification</b>	List of putaway item classifications for the Enterprise are displayed. An example, Product Line is shown below.
Product Line	Choose relevant product line item classification for the putaway activity.  Choose  . In the Classification Values window, select the applicable product line classification.
<b>System Directed Putaway Task Types</b>	<b>Displays the list of existing system directed putaway task types.</b>  <b>You may use  to delete an existing system directed putaway task type.</b>
Source Zone	Select the source zone where inventory is available.
Target Zone	Select the target zone where you want to move the inventory.
Container Type	Select the container type to be used to move the inventory from the source zone to the target zone. Typical values are Case and Pallet.
Task Type	Select the Putaway Task Type applicable to this putaway strategy. This field displays the list of existing system directed task types that belong to the 'PUTAWAY' activity group.
<b>Ad hoc Task Types</b>	<b>Displays the list of existing ad hoc task types.</b>  <b>You may use  to delete an existing ad hoc task type.</b>
Source Zone	Select the source zone where inventory is available.
Target Zone	Select the target zone where you want to move the inventory.



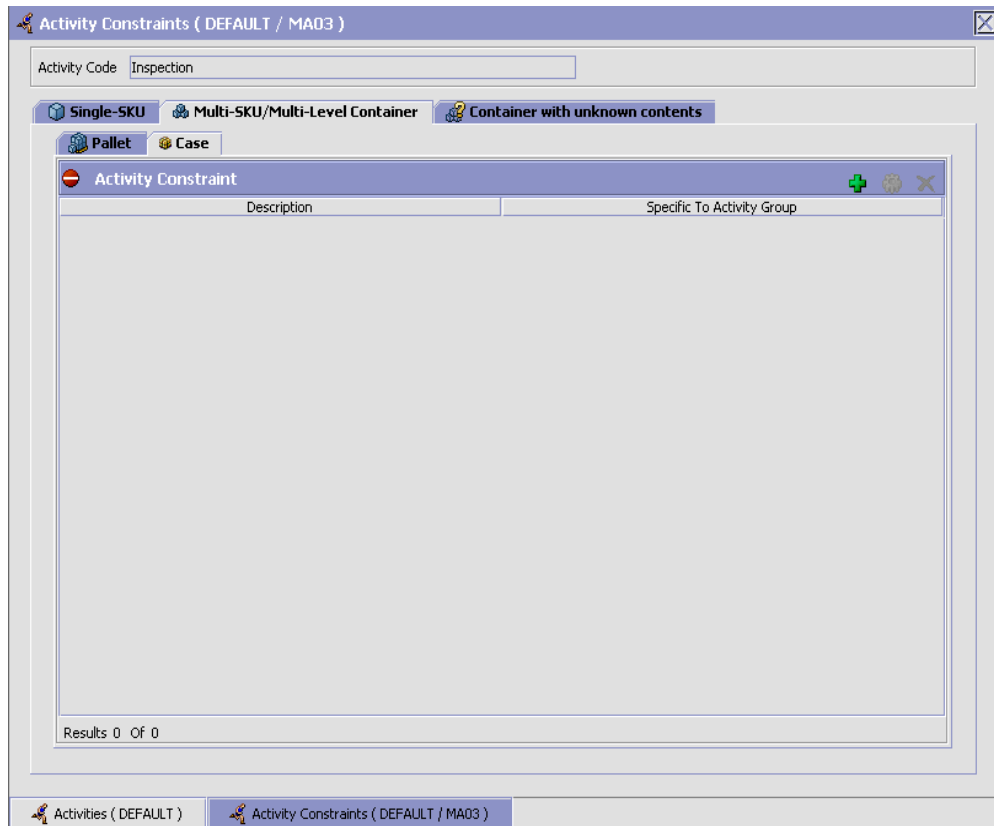
**Table 6–5 Putaway Strategy Details Window**



Field	Description
Container Type	Select the container type to be used to move the inventory from the source zone to the target zone. Typical values are Case and Pallet.
Task Type	Select the Putaway Task Type applicable to this putaway strategy. This field displays the list of existing ad hoc task types that belong to the 'PUTAWAY' activity group.

#### 6.2.2.1.2 Setting Up Activity Constraints for Multi-Level Cases

To set up activity constraints for multi-level cases:

1. In the Multi-SKU/Multi-Level Container tab of Activity Constraints window, choose the Case tab. The Case tab window is displayed.



2. In the Case tab window, choose .
3. The Activity Constraint Details window appears.
4. Enter information in the applicable fields. Refer [Table 6–6](#) for field value descriptions.
5. Choose .

**Activity Constraint Details ( DEFAULT / MA03 ) : Multi-SKU/Multi-Level Container : Case**

Description  To View Strategy Click here

Activity Code  Requesting Activity Group

**Location Priorities**

Priority	Location
*	

Results 0 Of 0

Activities ( DEFAULT )    Activity Constraints ( DEFAULT / MA03 )    **Activity Constraint Details ( DEFAULT / M...**

**Table 6–6 Activity Constraint Details - Multi-Level Case Tab**

Field	Description
Description	Enter a description for the activity constraint.
To View Strategy Click here	<p>Choose  to view or set up Putaway Strategy. For more details on setting up a putaway strategy see <a href="#">Setting Up Putaway Strategy for Multi-SKU/Multi-Level Containers - Cases</a>.</p> <p>Note: Putaway strategy may be specified for the putaway preferences after the preference is saved.</p>
Activity Code	This indicates the activity code for the constraint.


**Table 6–6 Activity Constraint Details - Multi-Level Case Tab**

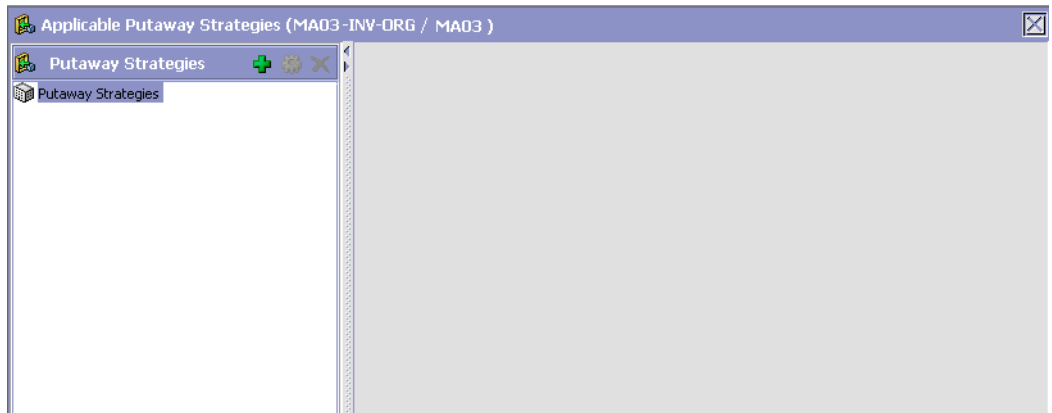
Field	Description
Requesting Activity Group	Choose the requesting activity group. Typical values are Receipt, Packing, and Value Added Services.
<b>Location Priorities</b>	
Priority	Enter a number to represent the priority.  The priority is used to sequence the order in which the location priorities are evaluated. For example, all storage code level priorities are to be evaluated first before generic priorities.  The priority needs to be a positive integer, greater than zero. This is a mandatory field.
Location	Choose the relevant location for the activity. This is a mandatory field.



### Setting Up Putaway Strategy for Multi-SKU/Multi-Level Containers - Cases

You can set up putaway strategies to putaway applicable inventory from a source zone to a target zone, based on the strategy specified.

To set up putaway strategy for multi-SKU/multi-level container cases:

1. In the Activity Constraint Details : Multi-SKU/multi-level Containers : Case window, choose .
2. The Applicable Putaway Strategies window is displayed.



3. Choose  in the Putaway Strategies panel. The Putaway Strategy Details window appears in the right panel.
4. Enter information in the applicable fields. See the Putaway Strategy Details Window table for field value descriptions.
5. Choose .

Putaway Strategy Details

DescriptionStrategy for DVD-LockAndKey-EACHUOMCASE

Item Classification

Product LineDVD

StorageTypeLockAndKey

Product Line

System Directed Putaway Task Types

	Source Zone	Target Zone	Container Type	Task Type
*				

Results 0 Of 0

Ad Hoc Task Types




	Source Zone	Target Zone	Container Type	Task Type
*				

Results 0 Of 0

Table 6–7 Putaway Strategy Details Window




Field	Description
Description	Enter a description for the Putaway Strategy.
UOM	Select the UOM for the Putaway Strategy, if applicable. Note: The UOM will be defaulted in instances where it has been specified in the Putaway Preference Details screen.

**Table 6–7 Putaway Strategy Details Window**

Field	Description
<b>Item Classification</b>	List of putaway item classifications for the Enterprise are displayed. An example, Product Line is shown below.
Product Line	Choose relevant product line item classification for the putaway activity.  Choose  . In the Classification Values window, select the applicable product line classification.
<b>System Directed Putaway Task Types</b>	<b>Displays the list of existing system directed putaway task types.</b>  <b>You may use  to delete an existing system directed putaway task type.</b>
Source Zone	Select the source zone where inventory is available.
Target Zone	Select the target zone where you want to move the inventory.
Container Type	Select the container type to be used to move the inventory from the source zone to the target zone. Typical values are Case and Pallet.
Task Type	Select the Putaway Task Type applicable to this putaway strategy. This field displays the list of existing system directed task types that belong to the 'PUTAWAY' activity group.
<b>Ad hoc Task Types</b>	<b>Displays the list of existing ad hoc task types.</b>  <b>You may use  to delete an existing ad hoc task type.</b>
Source Zone	Select the source zone where inventory is available.
Target Zone	Select the target zone where you want to move the inventory.
Container Type	Select the container type to be used to move the inventory from the source zone to the target zone. Typical values are Case and Pallet.
Task Type	Select the Putaway Task Type applicable to this putaway strategy. This field displays the list of existing ad hoc task types that belong to the 'PUTAWAY' activity group.


### 6.2.2.2 Modifying an Activity Constraint for Multi-SKU/multi-level Container

To modify an activity constraint for multi-SKU/multi-level container:


1. From the tree in the application rules side panel, choose Quality Control > Activities. The Activity Search window is displayed, with the list of activities.
2. Choose the Activity Code whose Activity Constraint is to be modified.
3. Choose . The Activity Constraints window is displayed.
4. In the Activity Constraints window, choose the Multi-SKU/Multi-Level Container tab. The Multi-SKU/Multi-Level Container tab window for Activity Constraints is displayed.
5. In the Multi-SKU/Multi-Level Container tab window, choose the activity constraint that is to be modified.
6. Choose . The Activity Constraint Details window is displayed.
7. Enter information in the applicable fields. For more information about modifying the fields, see [Section 6.2.2.1.1, "Setting Up Activity Constraints for Multi-Level Pallets"](#) on page 459 and [Section 6.2.2.1.2, "Setting Up Activity Constraints for Multi-Level Cases"](#) on page 465.
8. Choose .

### 6.2.2.3 Deleting an Activity Constraint for Multi-SKU/Multi-Level Container

To delete an activity constraint for Multi-SKU/Multi-Level Container:

1. From the tree in the application rules side panel, choose Quality Control > Activities. The Activity Search window is displayed, with the list of activities.
2. Choose the Activity Code whose Activity Constraint is to be modified.
3. Choose . The Activity Constraints window is displayed.
4. In the Activity Constraints window, choose the Multi-SKU/Multi-Level Container tab. The Multi-SKU/Multi-Level Container tab window for Activity Constraints is displayed.



5. In the Multi-SKU/Multi-Level Container tab window, choose the activity constraint that is to be deleted.
6. Choose .

### 6.2.3 Setting Up Activity Constraints for Container with Unknown Contents


The constraints for the activity of a multi-SKU case with LPN or pallet with LPN are specified here.

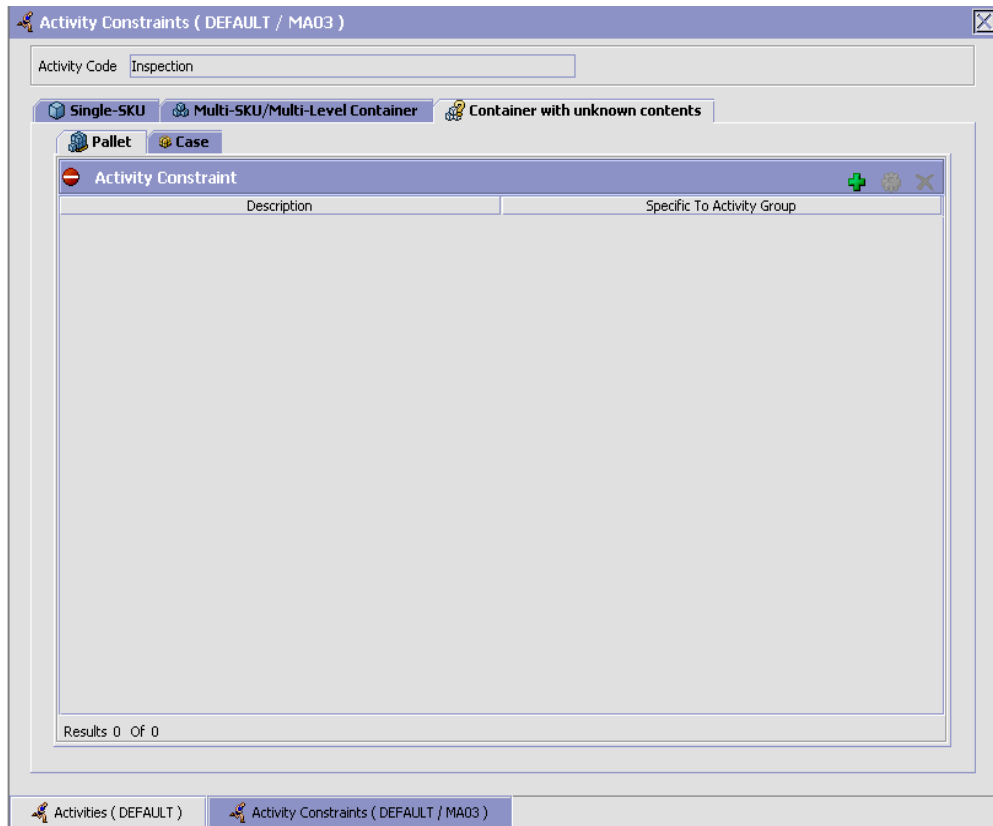
Use the Activity Constraints for Container set-up for:

- [Creating an Activity Constraint for Container with Unknown Contents](#)
- [Modifying an Activity Constraint for Container with Unknown Contents](#)
- [Deleting an Activity Constraint for Container with Unknown Contents](#)

#### 6.2.3.1 Creating an Activity Constraint for Container with Unknown Contents

To create an activity constraint for container with unknown contents:

1. From the tree in the application rules side panel, choose Quality Control > Activities. The Activity Search window is displayed, with the list of activities.
2. Choose the Activity Code whose Activity Constraint is to be set up.
3. Choose . The Activity Constraints window is displayed.
4. In the Activity Constraints window, choose the Container with Unknown Contents tab. The Container with Unknown Contents tab window for Activity Constraints is displayed.





Activity Constraints for Container cases or pallets are specified separately:

- [Setting Up Activity Constraints for Container Pallets](#)
- [Setting Up Activity Constraints for Container Cases](#)

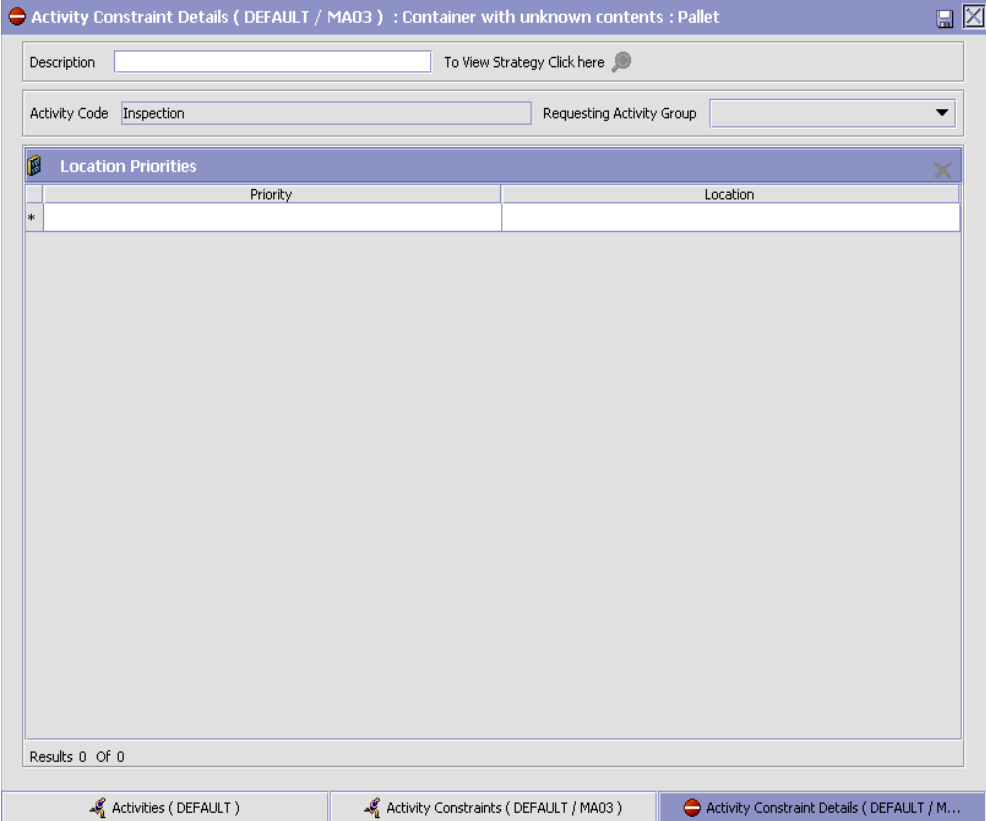
### 6.2.3.1.1 Setting Up Activity Constraints for Container Pallets

To set up activity constraints for containers pallets:



1. In the Container with Unknown Contents tab of Activity Constraints window, choose the Pallet tab. The Pallet tab window is displayed.
2. In the Pallet tab window, choose .

3. The Activity Constraint Details window appears.
4. Enter information in the applicable fields. Refer [Table 6–8](#) for field value descriptions.
5. Choose .

Activity Constraint Details ( DEFAULT / MA03 ) : Container with unknown contents : Pallet

Description  To View Strategy Click here 

Activity Code  Requesting Activity Group


 Location Priorities 

	Priority	Location
*		

Results 0 Of 0

Activities ( DEFAULT )    Activity Constraints ( DEFAULT / MA03 )    Activity Constraint Details ( DEFAULT / M...


**Table 6–8 Activity Constraint Details - Containers Pallet Tab**

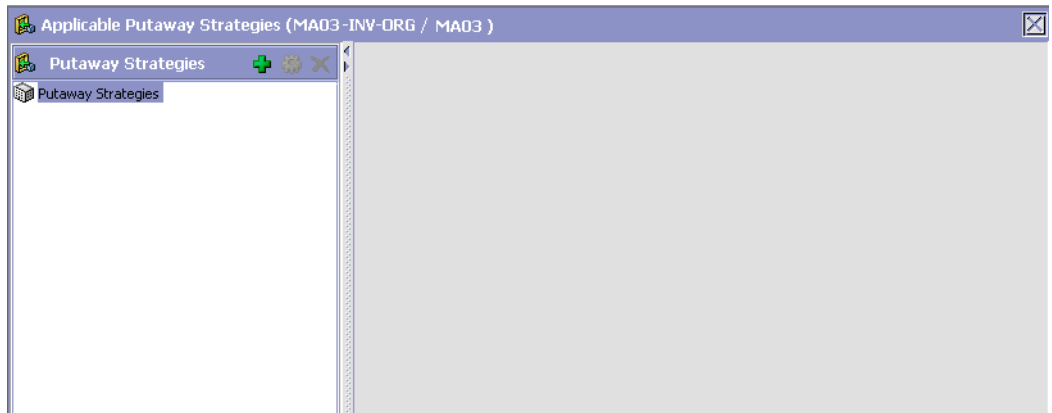
Field	Description
Description	Enter a description for the activity constraint.
To View Strategy Click here	<p>Choose  to view or set up Putaway Strategy. For more details on setting up a putaway strategy see <a href="#">Setting Up Putaway Strategy for Container with Unknown contents - Pallets</a>.</p> <p>Note: Putaway strategy may be specified for the putaway preferences after the preference is saved.</p>
Activity Code	This indicates the activity code for the constraint.
Requesting Activity Group	<p>Choose the requesting activity group.</p> <p>Typical values are Receipt, Packing, and Value Added Services.</p>
<b>Location Priorities</b>	
Priority	<p>Enter a number to represent the priority.</p> <p>The priority is used to sequence the order in which the location priorities are evaluated. For example, all storage code level priorities are to be evaluated first before generic priorities.</p> <p>The priority needs to be a positive integer, greater than zero. This is a mandatory field.</p>
Location	<p>Choose the relevant location for the activity.</p> <p>This is a mandatory field.</p>



### Setting Up Putaway Strategy for Container with Unknown contents - Pallets

You can set up putaway strategies to putaway applicable inventory from a source zone to a target zone, based on the strategy specified.

To set up putaway strategy for container with unknown content pallets:

1. In the Activity Constraint Details : Container with unknown contents : Pallet window, choose .
2. The Applicable Putaway Strategies window is displayed.



3. Choose  in the Putaway Strategies panel. The Putaway Strategy Details window appears in the right panel.
4. Enter information in the applicable fields. See the Putaway Strategy Details Window table for field value descriptions.
5. Choose .

Putaway Strategy Details

DescriptionStrategy for DVD-LockAndKey-EACHUOMCASE

Item Classification

Product LineDVD

StorageTypeLockAndKey

Product Line

System Directed Putaway Task Types

	Source Zone	Target Zone	Container Type	Task Type
*				

Results 0 Of 0

Ad Hoc Task Types




	Source Zone	Target Zone	Container Type	Task Type
*				

Results 0 Of 0

Table 6–9 Putaway Strategy Details Window

Field	Description
Description	Enter a description for the Putaway Strategy.
UOM	Select the UOM for the Putaway Strategy, if applicable. Note: The UOM will be defaulted in instances where it has been specified in the Putaway Preference Details screen.

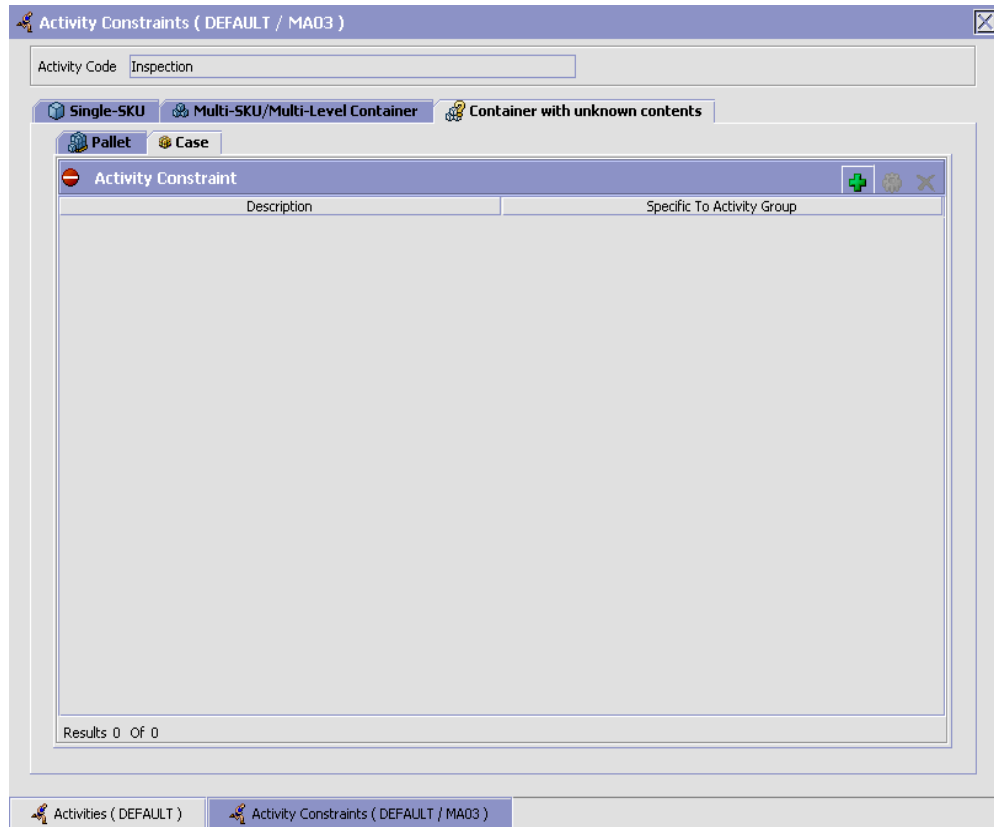
**Table 6–9 Putaway Strategy Details Window**



Field	Description
<b>Item Classification</b>	List of putaway item classifications for the Enterprise are displayed. An example, Product Line is shown below.
Product Line	Choose relevant product line item classification for the putaway activity.  Choose  . In the Classification Values window, select the applicable product line classification.
<b>System Directed Putaway Task Types</b>	<b>Displays the list of existing system directed putaway task types.</b>  <b>You may use  to delete an existing system directed putaway task type.</b>
Source Zone	Select the source zone where inventory is available.
Target Zone	Select the target zone where you want to move the inventory.
Container Type	Select the container type to be used to move the inventory from the source zone to the target zone. Typical values are Case and Pallet.
Task Type	Select the Putaway Task Type applicable to this putaway strategy. This field displays the list of existing system directed task types that belong to the 'PUTAWAY' activity group.
<b>Ad hoc Task Types</b>	<b>Displays the list of existing ad hoc task types.</b>  <b>You may use  to delete an existing ad hoc task type.</b>
Source Zone	Select the source zone where inventory is available.
Target Zone	Select the target zone where you want to move the inventory.
Container Type	Select the container type to be used to move the inventory from the source zone to the target zone. Typical values are Case and Pallet.
Task Type	Select the Putaway Task Type applicable to this putaway strategy. This field displays the list of existing ad hoc task types that belong to the 'PUTAWAY' activity group.

### 6.2.3.1.2 Setting Up Activity Constraints for Container Cases

To set up activity constraints for container cases:


1. In the Container with Unknown Contents tab of Activity Constraints window, choose the Case tab. The Case tab window is displayed.



2. In the Case tab window, choose .
3. The Activity Constraint Details window appears.
4. Enter information in the applicable fields. Refer [Table 6–10](#) for field value descriptions.
5. Choose .



**Activity Constraint Details ( DEFAULT / MA03 ) : Container with unknown contents : Case**

Description  To View Strategy Click here 

Activity Code  Requesting Activity Group


**Location Priorities**

	Priority	Location
*		

Results 0 Of 0

Activities ( DEFAULT )    Activity Constraints ( DEFAULT / MA03 )    **Activity Constraint Details ( DEFAULT / M...**

**Table 6–10 Activity Constraint Details - Containers Case Tab**

Field	Description
Description	Enter a description for the activity constraint.
To View Strategy Click here	<p>Choose  to view or set up Putaway Strategy. For more details on setting up a putaway strategy see <a href="#">Setting Up Putaway Strategy for Container with unknown contents - Cases</a>.</p> <p>Note: Putaway strategy may be specified for the putaway preferences after the preference is saved.</p>
Activity Code	This indicates the activity code for the constraint.


**Table 6–10 Activity Constraint Details - Containers Case Tab**

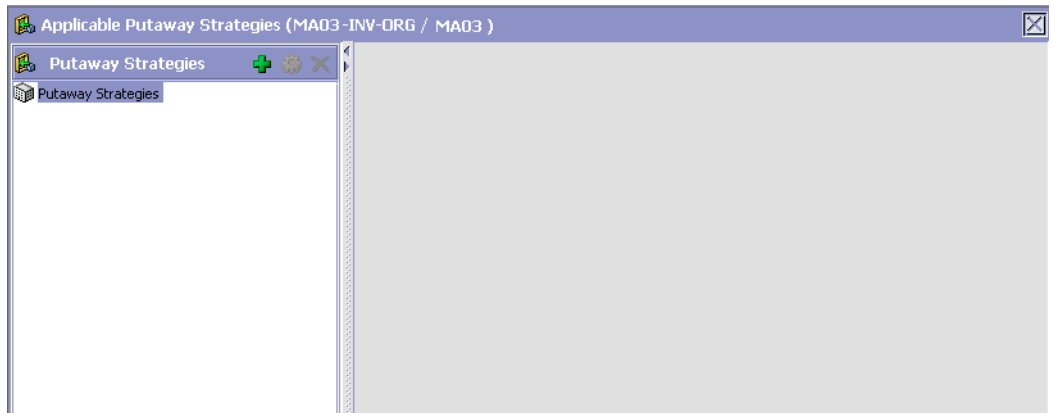
Field	Description
Requesting Activity Group	Choose the requesting activity group. Typical values are Receipt, Packing, and Value Added Services.
<b>Location Priorities</b>	
Priority	Enter a number to represent the priority.  The priority is used to sequence the order in which the location priorities are evaluated. For example, all storage code level priorities are to be evaluated first before generic priorities.  The priority needs to be a positive integer, greater than zero. This is a mandatory field.
Location	Choose the relevant location for the activity. This is a mandatory field.



### Setting Up Putaway Strategy for Container with unknown contents - Cases

You can set up putaway strategies to putaway applicable inventory from a source zone to a target zone, based on the strategy specified.

To set up putaway strategy for Container with unknown contents cases:

1. In the Activity Constraint Details : Container with unknown content : Case window, choose .
2. The Applicable Putaway Strategies window is displayed.



3. Choose  in the Putaway Strategies panel. The Putaway Strategy Details window appears in the right panel.
4. Enter information in the applicable fields. See the Putaway Strategy Details Window table for field value descriptions.
5. Choose .

Putaway Strategy Details

DescriptionStrategy for DVD-LockAndKey-EACHUOMCASE

Item Classification

Product LineDVD

StorageTypeLockAndKey

Product Line

System Directed Putaway Task Types

	Source Zone	Target Zone	Container Type	Task Type
*				

Results 0 Of 0

Ad Hoc Task Types




	Source Zone	Target Zone	Container Type	Task Type
*				

Results 0 Of 0

Table 6–11 Putaway Strategy Details Window




Field	Description
Description	Enter a description for the Putaway Strategy.
UOM	Select the UOM for the Putaway Strategy, if applicable. Note: The UOM will be defaulted in instances where it has been specified in the Putaway Preference Details screen.

**Table 6–11 Putaway Strategy Details Window**

Field	Description
<b>Item Classification</b>	List of putaway item classifications for the Enterprise are displayed. An example, Product Line is shown below.
Product Line	Choose relevant product line item classification for the putaway activity.  Choose  . In the Classification Values window, select the applicable product line classification.
<b>System Directed Putaway Task Types</b>	<b>Displays the list of existing system directed putaway task types.</b>  <b>You may use  to delete an existing system directed putaway task type.</b>
Source Zone	Select the source zone where inventory is available.
Target Zone	Select the target zone where you want to move the inventory.
Container Type	Select the container type to be used to move the inventory from the source zone to the target zone. Typical values are Case and Pallet.
Task Type	Select the Putaway Task Type applicable to this putaway strategy. This field displays the list of existing system directed task types that belong to the 'PUTAWAY' activity group.
<b>Ad hoc Task Types</b>	<b>Displays the list of existing ad hoc task types.</b>  <b>You may use  to delete an existing ad hoc task type.</b>
Source Zone	Select the source zone where inventory is available.
Target Zone	Select the target zone where you want to move the inventory.
Container Type	Select the container type to be used to move the inventory from the source zone to the target zone. Typical values are Case and Pallet.
Task Type	Select the Putaway Task Type applicable to this putaway strategy. This field displays the list of existing ad hoc task types that belong to the 'PUTAWAY' activity group.


### 6.2.3.2 Modifying an Activity Constraint for Container with Unknown Contents

To modify an activity constraint for container:

1. From the tree in the application rules side panel, choose Quality Control > Activities. The Activity Search window is displayed, with the list of activities.
2. Choose the Activity Code whose Activity Constraint is to be modified.
3. Choose . The Activity Constraints window is displayed.
4. In the Activity Constraints window, choose the Container with Unknown Contents tab. The Container with Unknown Contents tab window for Activity Constraints is displayed.
5. In the Container with Unknown Contents tab window, choose the activity constraint that is to be modified.
6. Choose . The Activity Constraint Details window is displayed.
7. Enter information in the applicable fields. For more information about modifying the fields, see [Section 6.2.3.1.1, "Setting Up Activity Constraints for Container Pallets"](#) on page 474 and [Section 6.2.3.1.2, "Setting Up Activity Constraints for Container Cases"](#) on page 480.
8. Choose .

### 6.2.3.3 Deleting an Activity Constraint for Container with Unknown Contents

To delete an activity constraint for container:

1. From the tree in the application rules side panel, choose Quality Control > Activities. The Activity Search window is displayed, with the list of activities.
2. Choose the Activity Code whose Activity Constraint is to be deleted.
3. Choose . The Activity Constraints window is displayed.
4. In the Activity Constraints window, choose the Container with Unknown Contents tab. The Container with Unknown Contents tab window for Activity Constraints is displayed.
5. In the Container with Unknown Contents tab window, choose the activity constraint that is to be deleted.

6. Choose .

## 6.3 Defining Retrieval Strategy

Retrieval Strategy defines the retrieval process to be followed when retrieving items for inspection. This is defined at the 'INSPECTION' activity group level.

For example, retrieving pre-received containers that have been putaway or retrieving inventory for inspection after they have been putaway.


**Note:** It is recommended that Zones containing Locations of type VIRTUAL should not be selected, while configuring the Putaway Preferences and Retrieval Strategy.

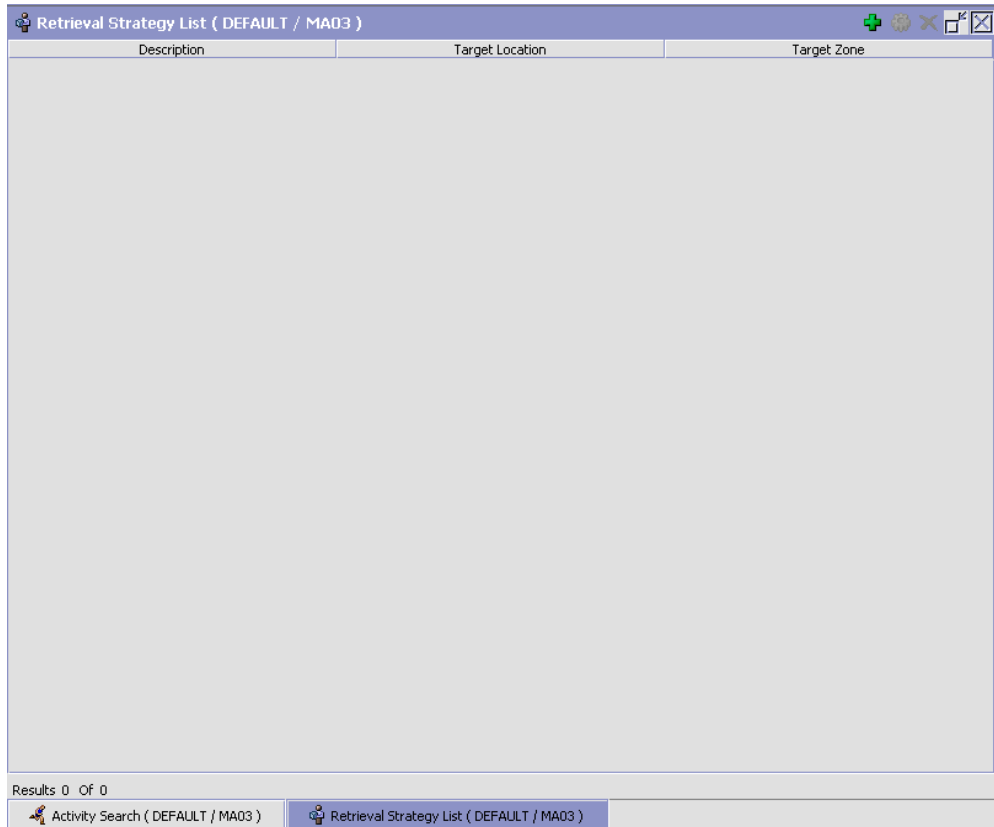
Use Retrieval Strategy for:



- [Creating a Retrieval Strategy](#)
- [Modifying a Retrieval Strategy](#)
- [Deleting a Retrieval Strategy](#)

### 6.3.1 Creating a Retrieval Strategy

To create a retrieval strategy:

1. From the tree in the application rules side panel, choose Quality Control > Activities. The Activity Search window is displayed, with the list of activities.
2. In the top right corner, choose . The Retrieval Strategy List window is displayed.



3. In the Retrieval Strategy List window, choose . The Retrieval Strategy Details window is displayed.
4. Enter information in the applicable fields. Refer [Table 6–12](#) for field value descriptions.
5. Choose .



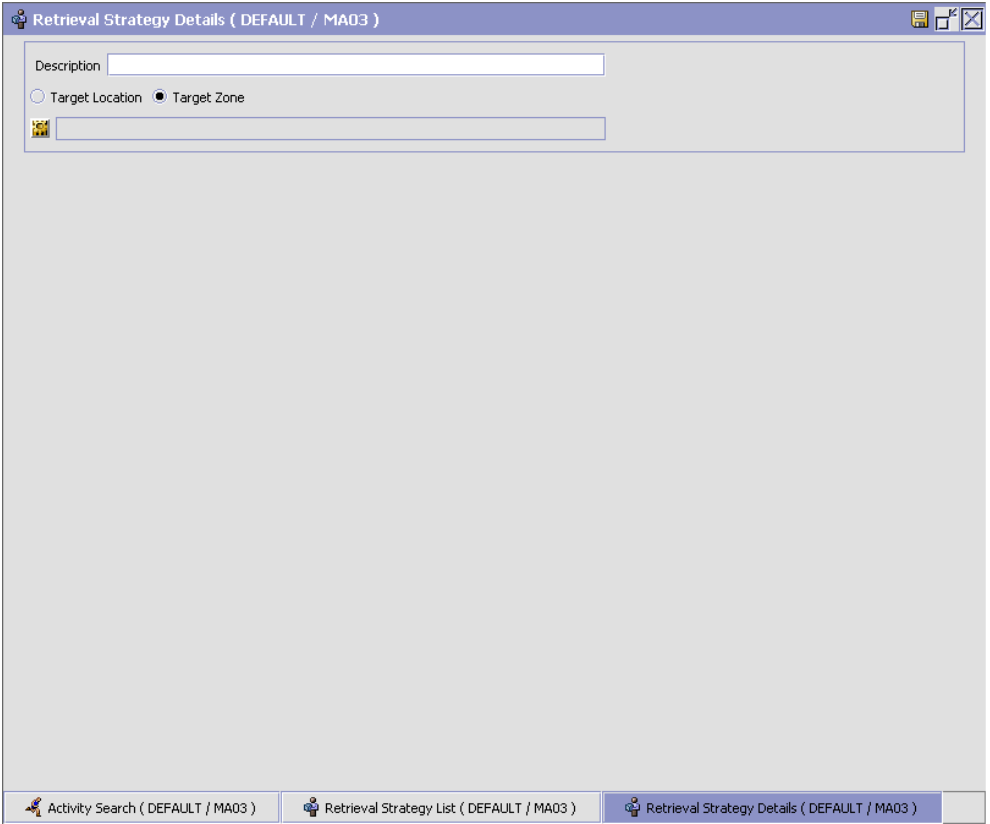
The screenshot shows a software window titled "Retrieval Strategy Details ( DEFAULT / MA03 )". Inside the window, there is a "Description" label followed by a text input field. Below this, there are two radio buttons: "Target Location" and "Target Zone", with "Target Zone" being selected. Under the radio buttons is another text input field with a small icon to its left. The window has a standard Windows-style title bar and a taskbar at the bottom with three buttons: "Activity Search ( DEFAULT / MA03 )", "Retrieval Strategy List ( DEFAULT / MA03 )", and "Retrieval Strategy Details ( DEFAULT / MA03 )".

Table 6–12 Retrieval Strategy Details Window


Field	Description
Description	Enter a description for the retrieval strategy.

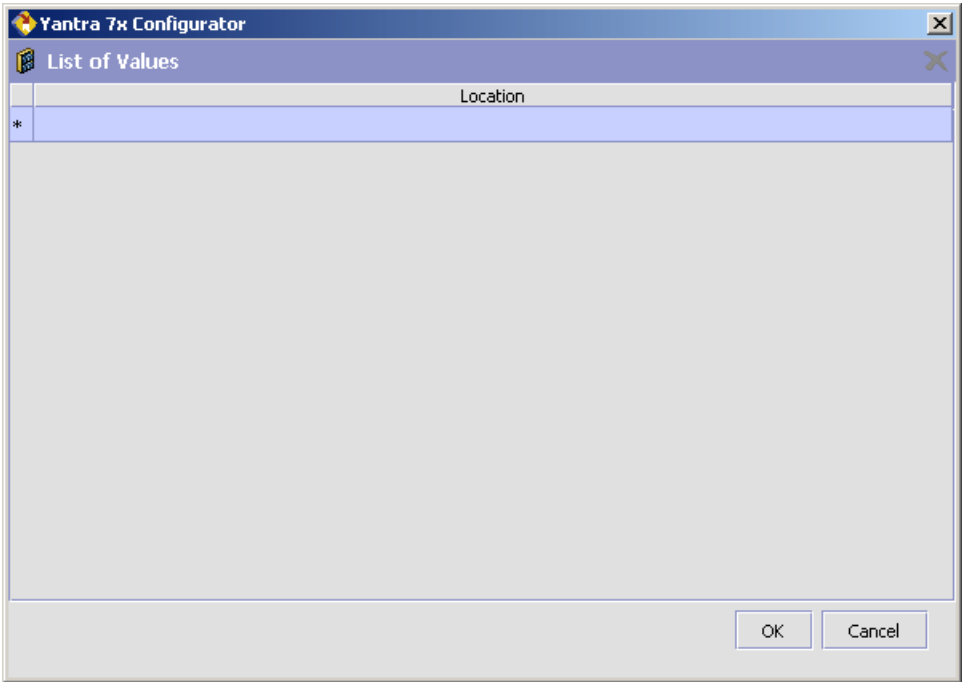
**Table 6–12 Retrieval Strategy Details Window**

Field	Description
Target Location	<p>Select if inventory is being retrieved to a specific location. For example, in retrieval for inspection strategy, inventory is retrieved to the quality control location in a warehouse.</p> <p>For more information about defining a target location, see <a href="#">Section 6.3.1.1, "Defining Target Location for Retrieval Strategy"</a> on page 490.</p>
Target Zone	<p>Select if inventory is being retrieved to a zone. For example, in retrieval for receiving strategy, inventory is retrieved to the dock zone in a warehouse.</p> <p>For more information about defining a target location, see <a href="#">Section 6.3.1.2, "Defining Target Zone for Retrieval Strategy"</a> on page 491.</p>

### 6.3.1.1 Defining Target Location for Retrieval Strategy

To define a target location for the retrieval strategy:

1. In the Retrieval Strategy Details window, select 'Target Location'.
2. Choose . The List of Values pop-up window appears.
3. Enter information in the applicable fields. Refer [Table 6–13](#) for field value descriptions.
4. Choose OK.




**Table 6–13** *List of Values Pop-up Window*

Field	Description
Location	Choose the appropriate location for retrieval strategy.

### 6.3.1.2 Defining Target Zone for Retrieval Strategy

To define a target zone for the retrieval strategy:

1. In the Retrieval Strategy Details window, select 'Target Zone'.
2. Choose . The List of Values pop-up window appears.
3. Enter information in the applicable fields. Refer [Table 6–14](#) for field value descriptions.
4. Choose OK.

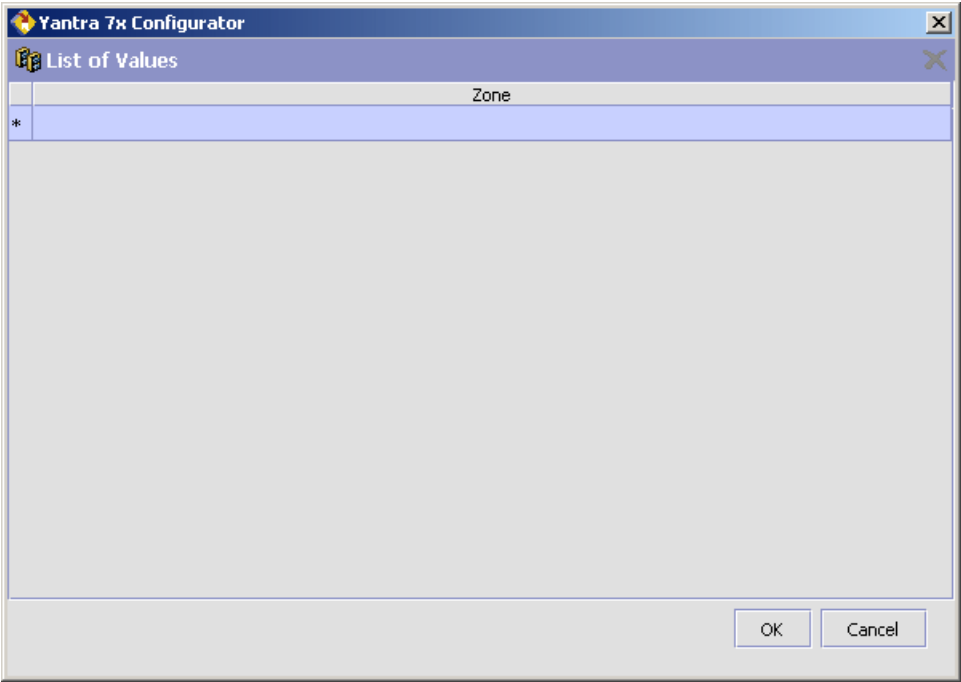


Table 6–14 List of Values Pop-up Window

Field	Description
Zone	Choose the appropriate zone for retrieval strategy.

6.3.1.2.1 Defining Pick Location Assignment

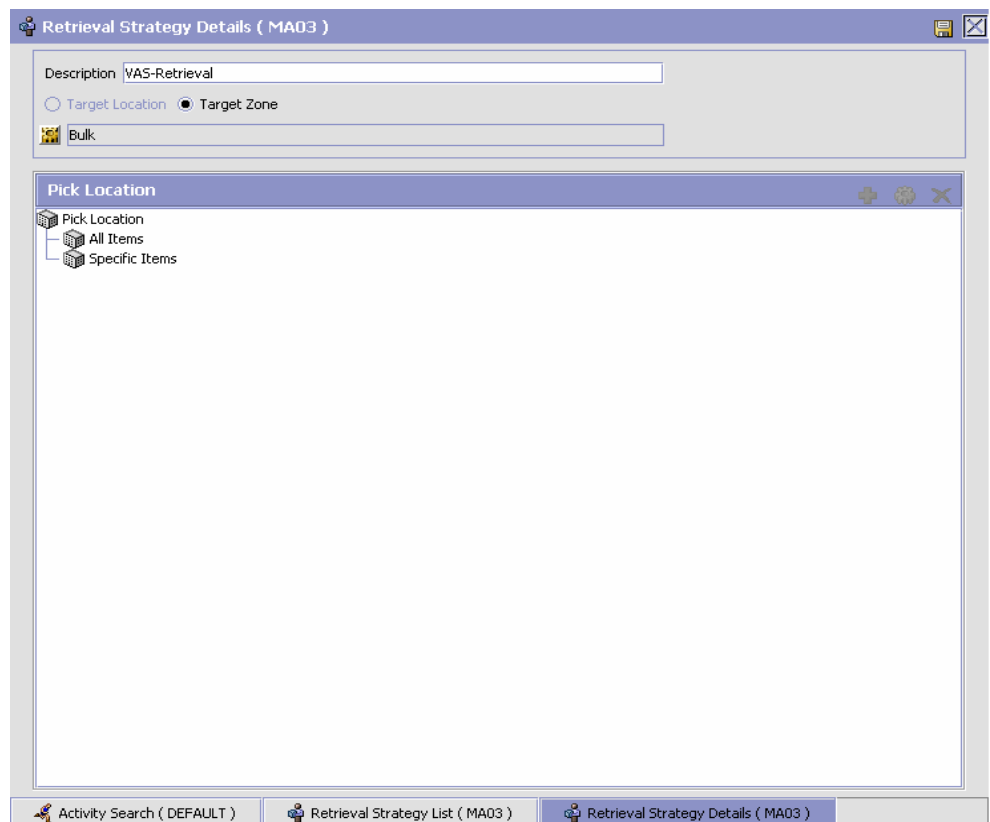
*Pick Location Assignment* (PLA) assigns the warehouse location(s) to the demand placed. PLA defines the list of zones to use for picking by specifying for a combination of item level attributes, such as classifications and unit of measure. Multiple PLA rules may be specified to ensure that the zone level constraints are unique to the item classification and unit of measure combination. For example, for SKUs stocked in pallets, cases and loose units, it is advisable to have 3 distinct rules to cover zones that are applicable for each unit of measure. The

locations to be used in the zone can be filtered further by considering the least travel or pick-to-clean constraints.

After creating a Retrieval Strategy, you can define the Pick Location Assignment for the Retrieval Strategy.

To define pick location assignment:

1. On saving the Retrieval Strategy, the Pick Location panel is displayed in the Retrieval Strategy Details window.





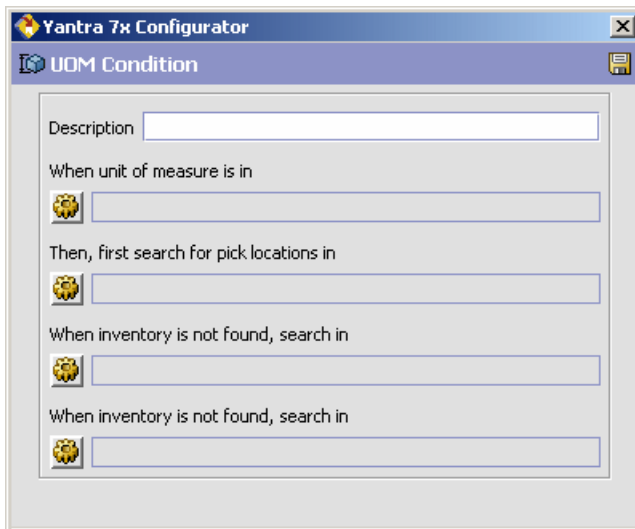
2. You can set up Pick Location Assignment for All Items or for Specific Items.

### Assigning Pick Location Rules for All Items

You can define global PLA rules for all items in a warehouse based on unit of measure.

To assign pick location rules for all items:



1. From the Pick Location tree in the Pick Location panel in the Retrieval Strategy Details window, select All Items.
2. Choose . The UOM Condition pop-up window is displayed.
3. Enter information in the applicable fields. Refer to [Table 6–15](#) for field value descriptions.
4. Choose .





The screenshot shows a window titled "Yantra 7x Configurator" with a sub-header "UOM Condition". The window contains several input fields with a gear icon to the left of each label:

- Description:
- When unit of measure is in:
- Then, first search for pick locations in:
- When inventory is not found, search in:
- When inventory is not found, search in:

**Table 6–15 UOM Condition Pop-Up Window**

Field	Description
Description	Enter a brief description of the unit of measure condition.
When Unit of Measure is in	<p>You must specify the unit(s) of measure for which this condition is based. The system uses the pick location parameters that you specify to generate pick plans for items of the unit(s) of measure you select.</p> <p>Choose . The List of Values pop-up window is displayed. Select the blank line and choose a unit of measure from the drop-down menu. When you have finished adding units of measure, choose OK.</p>
Then First search for pick locations in	<p>You must specify the pick location parameters to be used initially.</p> <p>Choose . The Pick Location Assignment pop-up window is displayed. See <a href="#">The Pick Location Assignment Pop-Up Window</a> for field level descriptions.</p> <p>When you have finished defining pick location parameters, choose OK.</p>

**Table 6–15 UOM Condition Pop-Up Window**

Field	Description
When inventory is not found, search in	<p>You can define pick location parameters to be used if inventory is not found using the initial parameters.</p> <p>Choose . The Pick Location Assignment pop-up window is displayed. See <a href="#">The Pick Location Assignment Pop-Up Window</a> for field level descriptions.</p> <p>When you have finished defining pick location parameters, choose OK.</p>
When inventory is not found, search in	<p>You can define pick location parameters to be used if inventory is not found using the second set of parameters.</p> <p>Choose . The Pick Location Assignment pop-up window is displayed. See <a href="#">The Pick Location Assignment Pop-Up Window</a> for field level descriptions.</p> <p>When you have finished defining pick location parameters, choose OK.</p>

## The Pick Location Assignment Pop-Up Window

The Pick Location Assignment pop-up window is used to set the parameters used to determine the location from which items are picked. Refer to [Table 6–16](#) for field value descriptions.





**Yantra 7x Configurator**

**Pick Location Assignment**

Description

**Location Selection**

1. Locations with Inventory Select locations having inventory from the following zones  



Select Inventory only when it is in one of the following status  


Optimize retrieval by ☒ Pick to clean ☐ Least number of trips


Round up quantity in a trip when possible to

☐ Case ☐ Each ☐ Half Pallet ☐ Inner Pack ☐ Pallet

2. Dedicated Locations ☐ For the remaining demand, select dedicated location(s) from the zones listed above.  
☐ For items without dedicated locations dynamically slot a location from the zones listed above.

3. Cross Dock Locations For the demand left over from the previous steps, explore cross-docking opportunity.  
 Search for inbound shipments that are in following status  


**Task Creation**


Task Type  

OK Cancel



**Table 6–16 Pick Location Assignment Window**

Field	Description
Description	Enter a brief description of the pick location assignment parameters.
Location Selection	
Locations with Inventory	When this pick location assignment is used, the system initially tries to find the optimal location to pick inventory based on the parameters you define below.

**Table 6–16 Pick Location Assignment Window**

Field	Description
Select locations having inventory from the following zones	<p>You must specify the zones that you want to pick from when this pick location assignment is used.</p> <p>Choose . The List of Values pop-up window is displayed. Select the blank line and choose a zone from the drop-down menu. When you have finished adding zones, choose OK.</p>
Optimize retrieval by	<p>Choose Pick to Clean if you want the pick location assignment to locate a source for inventory and pick from it until there is no inventory available at that location.</p> <p>Choose Least Trips if you want to optimize the pick location assignment on making the least amount of trips while picking inventory.</p>
Round up quantity in a trip when possible to	<p>Select the unit of measure to round up to when retrieving inventory for replenishment. The round up will occur only in instances when there is sufficient inventory.</p> <p>For example, there is an item that is picked by EACH that needs to be replenished. 9 EACH needs to be replenished. 12 EACH make a CASE. If you select Case for this field, the algorithm rounds the unit of measure for this retrieval task from 9 EACH to 1 CASE.</p>
Dedicated Locations	<p>For pick demand that exists after the 'Locations with Inventory' algorithm has been performed, the system looks for locations dedicated specifically for the inventory.</p>
For the remaining demand, select dedicated location(s) from the zones listed above.	<p>Select this field if you want any pick demand that was not fulfilled using the above parameters to be picked from dedicated locations in the zones you have specified for Locations with Inventory. By selecting this field the system uses replenishment to ensure that the dedicated location remains stocked with pickable inventory.</p>
For items without dedicated locations, dynamically slot a location from the zones listed above.	<p>Select this field if you want items that do not have a dedicated picking location to be dynamically slotted for picking. The location is dynamically slotted in the zones you have specified for Locations with Inventory.</p>

**Table 6–16 Pick Location Assignment Window**

Field	Description
Cross Dock Locations	For any remaining pick demand, you can define the inbound shipment status level(s) from which items can be cross-docked. Cross-docking allows you to retrieve inventory directly from receiving staging locations and bring the inventory to the target location of the move request.
Search for inbound shipments that are in following status	<p>You can specify the inbound shipment status(es) that you want to search for inventory. The system searches for inbound shipments in the specified status(es). Once the shipment is received the system diverts the inventory to the dynamically slotted location.</p> <p>Choose . The List of Values pop-up window is displayed. Select the blank line and choose an inbound shipment status from the drop-down menu. When you have finished adding inbound shipment statuses, choose OK.</p>
Task Creation	
Task Type	<p>Choose the applicable task type.</p> <p>Choose  to create a new task type. For more information about Task Type, see <a href="#">Section 12.3, "Defining Task Types"</a> on page 887.</p>


**Note:** For Dedicated Locations, Dynamic Slots, and Pick Fence, move request and replenish task will be created. For Cross Dock Locations, move request and replenish task are NOT created, instead the Wave Release or Move Request Release will create "Activity Demand".

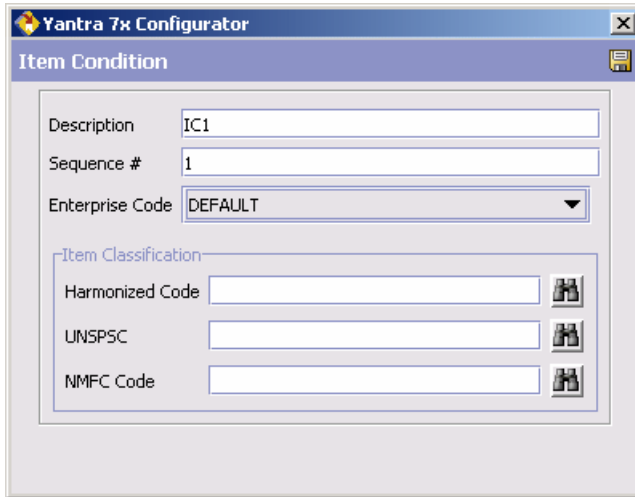
### Assigning Pick Location Rules for Specific Items

You can define PLA rules for items in a warehouse based on item classification and unit of measure.

To assign pick location for specific items:

1. From the Pick Location tree in the Pick Location panel in the Retrieval Strategy Details window, select Specific Items.

2. Choose . The Item Condition pop-up window is displayed.






3. In Description, enter a brief description of the item condition.
4. In Sequence #, enter the sequence number. Items are evaluated for the criteria you define. The sequence number determines the order by which item conditions evaluate items. Once an item matches up with a item condition's criteria, it uses the applicable pick location assignment algorithms.

**Note:** When an item is being requested for performing PLA, the item conditions are evaluated in a sequence. Once any of the conditions is evaluated as 'true', no more conditions are further evaluated. The evaluated condition is used for performing PLA.

5. From Enterprise Code, select the Enterprise you want to associate with the item condition.
6. In Item Classification, enter the applicable classification parameters as per your business practices. Fields used in Classifications are mapped to the Enterprise that you select for the item condition. For




more information about configuring classifications, see the *Yantra 7x Product Management Configuration Guide*.

7. Choose .
8. From the Pick Location tree, select the item assignment you created and choose . The UOM Condition pop-up window is displayed.
9. Enter information in the applicable fields. Refer to [Table 6–15](#) for field value descriptions.
10. Choose .

### 6.3.2 Modifying a Retrieval Strategy


Once a Retrieval Strategy has been created, it can be modified.


To modify a retrieval strategy:

1. From the tree in the application rules side panel, choose Quality Control > Activities. The Activity Search window is displayed, with the list of activities.
2. In the top right corner, choose . The Retrieval Strategy List window is displayed with the list of Retrieval Strategies.
3. In the Retrieval Strategy List window, choose the Retrieval Strategy to be modified.
4. Choose . The Retrieval Strategy Details window is displayed.
5. Enter information in the applicable fields. Refer [Table 6–12](#) for field value descriptions.
6. Choose .

### 6.3.3 Deleting a Retrieval Strategy

To delete a retrieval strategy:

1. From the tree in the application rules side panel, choose Quality Control > Activities. The Activity Search window is displayed, with the list of activities.
2. In the top right corner, choose . The Retrieval Strategy List window is displayed with the list of Retrieval Strategies.

3. In the Retrieval Strategy List window, choose the Retrieval Strategy to be deleted.
4. Choose .

## 6.4 Defining Putaway Preferences

Inventory being received at the dock require to be putaway to appropriate locations, based on shipment attributes, item classifications and location attributes.

The preferences for putting away of inventory is specified by zone and location storage attributes, for the SKU and container attributes.

**Note:** It is recommended that Zones containing Locations of type VIRTUAL should not be selected, while configuring the Putaway Preferences and Retrieval Strategy.

Use Putaway Preferences for:

- [Setting Up Putaway Preference for Single SKU](#)
- [Setting Up Putaway Preference for Multi-SKU/Multi-Level Container](#)
- [Setting Up Putaway Preferences for Container with Unknown Contents](#)

### 6.4.1 Setting Up Putaway Preference for Single SKU

The preferences for the putaway of a single SKU are specified here. This applies for all UOM of a SKU.


For example, the putaway preference for a CASE, PALLET and loose quantity of a single SKU being putaway are specified here.

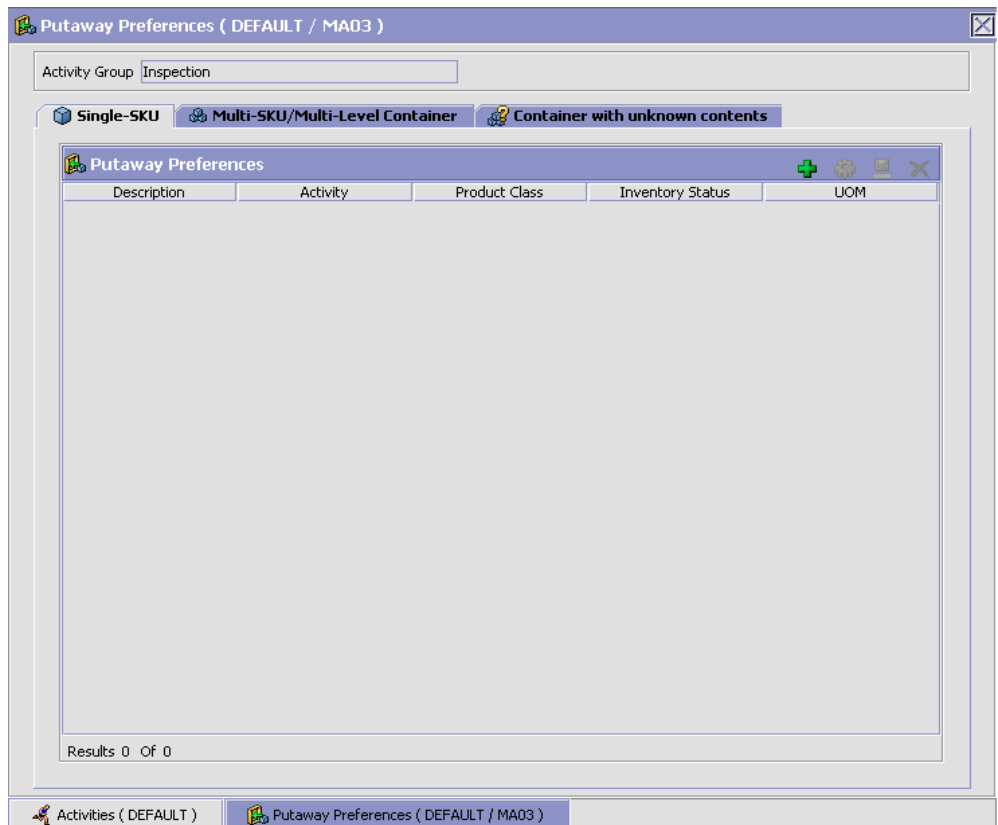
Use Putaway Preferences for Single SKU set-up for:


- [Creating a Putaway Preferences for Single SKU](#)
- [Creating a New Putaway Preference for Single SKU from an existing Putaway Preference](#)
- [Modifying a Putaway Preference for Single SKU](#)
- [Deleting a Putaway Preference for Single SKU](#)


### 6.4.1.1 Creating a Putaway Preferences for Single SKU

To create a putaway preference for single SKU:

1. From the tree in the application rules side panel, choose Quality Control > Activities. The Activity Search window is displayed, with the list of activities.
2. In the top right corner, choose  in the Activity Search window to access Putaway Preferences window.
3. In the Putaway Preferences window, choose the Single-SKU tab. The Single-SKU tab window is displayed.



4. In the Single-SKU tab window, choose .

- 5. The Putaway Preference Details window appears.
- 6. Enter information in the applicable fields. Refer [Table 6–17](#) for field value descriptions.
- 7. Choose .

Putaway Preference Details ( DEFAULT / MA03 ) : Single-SKU

Activity GroupInspectionTo View Strategy Click here

Description

Activity CodeProduct Class

Inventory StatusSegment Type

SegmentUOM

Container Type

Item Classification

Zone Priorities

	Priority	Zone	Storage Code
*			

Results 0 Of 0


Activities ( DEFAULT )

Putaway Preferences ( DEFAULT / M...


Putaway Preference Details ( DEFAU...



**Table 6–17 Putaway Preference Details Window (Single SKU)**

Field	Description
Activity Group	This is automatically populated by the system as 'INSPECTION'.
To View Strategy Click here	Choose  to view or set up Putaway Strategy. For more details on setting up a putaway strategy see <a href="#">Setting Up Putaway Strategy for Single-SKUs</a> .  Note: Putaway strategy may be specified for the putaway preferences after the preference is saved.
Description	Enter a brief description for the putaway preference.
Activity Code	Choose the activity code for the putaway preference. This is a mandatory field.
Product Class	Choose the product class for the preference, if applicable.  Product class is the inventory classification of an item based on product's characteristics. Typical values are FQ - First Quality, SQ - Second Quality, etc.
Inventory Status	Choose the inventory status for the preference, if applicable.  Inventory status refers to an inventory sub classification based on the results of the inventory control processes within the warehouse.
Segment Type	Enter the segment type for the preference, if applicable.  This indicates an inventory category. Typical values are MTC – Made to Customer, and MTO - Made to Order.
Segment #	Enter the segment number for the preference, if applicable.  A segment holds either the specific buyer or specific order number that requires dedication.
UOM	Choose the UOM for the preference, if applicable. UOM points to the Unit of measure of the item.
Container Type	The container type associated with the UOM selected is displayed. Typical values are "Pallet" and "Case".

**Table 6–17 Putaway Preference Details Window (Single SKU)**


Field	Description
Item Classification	List of putaway item classifications for the Enterprise are displayed. An example, Product Line is shown below.
Product Line	Choose relevant product line item classification for the putaway activity.  Choose  . In the Classification window, select the applicable product line classification.
Zone Priorities	
Priority	Enter a number to represent the priority.  The priority is used to sequence the order in which the zone priorities are evaluated. For example, all storage code level priorities are to be evaluated first before generic priorities.  The priority needs to be a positive integer, greater than zero. This is mandatory.
Zone	Choose the relevant zone for putaway.  This is a mandatory field.
Storage Code	Choose the storage code for the zone, if applicable.  This limits the locations being evaluated to the storage code specified. For example, putaway of hazardous items into a zone are restricted to the locations having the appropriate storage code.

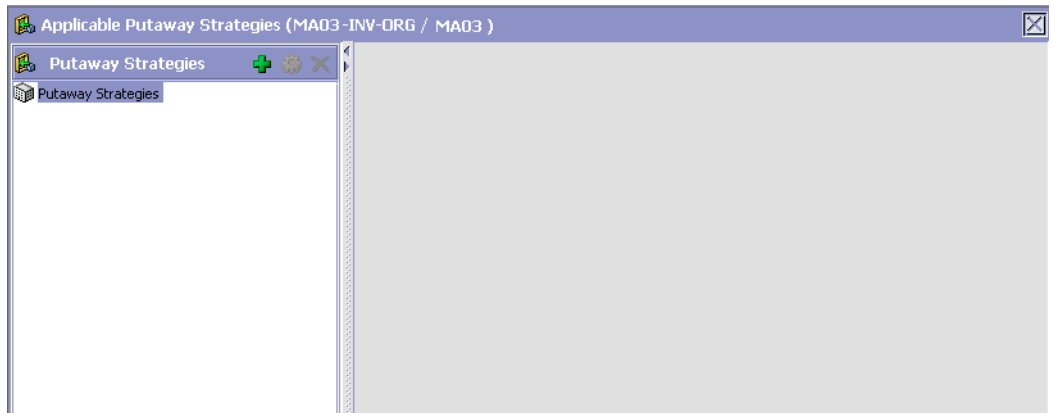
*Putaway strategy may be specified for the putaway preferences after the preference is saved. This is specified at an item classification and UOM level, if applicable.*



### Setting Up Putaway Strategy for Single-SKUs

You can set up putaway strategies to putaway applicable inventory from a source zone to a target zone, based on the strategy specified.

To set up putaway strategy for single-SKUs:

1. In the Putaway Preference Details : Single SKU window, choose .
2. The Applicable Putaway Strategies window is displayed.



3. Choose  in the Putaway Strategies panel. The Putaway Strategy Details window appears in the right panel.
4. Enter information in the applicable fields. See the Putaway Strategy Details Window table for field value descriptions.
5. Choose .

Putaway Strategy Details

DescriptionStrategy for DVD-LockAndKey-EACHUOMCASE

Item Classification

Product LineDVD

StorageTypeLockAndKey

Product Line

System Directed Putaway Task Types

	Source Zone	Target Zone	Container Type	Task Type
*				

Results 0 Of 0

Ad Hoc Task Types




	Source Zone	Target Zone	Container Type	Task Type
*				

Results 0 Of 0

Table 6–18 Putaway Strategy Details Window




Field	Description
Description	Enter a description for the Putaway Strategy.
UOM	Select the UOM for the Putaway Strategy, if applicable. Note: The UOM will be defaulted in instances where it has been specified in the Putaway Preference Details screen.

**Table 6–18 Putaway Strategy Details Window**

Field	Description
<b>Item Classification</b>	List of putaway item classifications for the Enterprise are displayed. An example, Product Line is shown below.
Product Line	Choose relevant product line item classification for the putaway activity.  Choose  . In the Classification Values window, select the applicable product line classification.
<b>System Directed Putaway Task Types</b>	<b>Displays the list of existing system directed putaway task types.</b>  <b>You may use  to delete an existing system directed putaway task type.</b>
Source Zone	Select the source zone where inventory is available.
Target Zone	Select the target zone where you want to move the inventory.
Container Type	Select the container type to be used to move the inventory from the source zone to the target zone. Typical values are Case and Pallet.
Task Type	Select the Putaway Task Type applicable to this putaway strategy. This field displays the list of existing system directed task types that belong to the 'PUTAWAY' activity group.
<b>Ad hoc Task Types</b>	<b>Displays the list of existing ad hoc task types.</b>  <b>You may use  to delete an existing ad hoc task type.</b>
Source Zone	Select the source zone where inventory is available.
Target Zone	Select the target zone where you want to move the inventory.
Container Type	Select the container type to be used to move the inventory from the source zone to the target zone. Typical values are Case and Pallet.
Task Type	Select the Putaway Task Type applicable to this putaway strategy. This field displays the list of existing ad hoc task types that belong to the 'PUTAWAY' activity group.

### 6.4.1.2 Creating a New Putaway Preference for Single SKU from an existing Putaway Preference



To create a new putaway preference for single SKU from an existing putaway preference:


1. From the tree in the application rules side panel, choose Quality Control > Activities. The Activity Search window is displayed, with the list of activities.
2. In the top right corner, choose  in the Activity Search window to access Putaway Preferences window.
3. In the Putaway Preferences window, choose the Single-SKU tab.
4. The Single-SKU tab window is displayed, with the list of putaway preferences.
5. Select the putaway preference to be copied from. Choose .
6. The Putaway Preference Details window is displayed.
7. Enter information in the applicable fields. Refer [Table 6–17](#) for field value descriptions.
8. Choose .

### 6.4.1.3 Modifying a Putaway Preference for Single SKU

Once a Putaway Preference for Single SKU has been created, it can be modified.

To modify a putaway preference for single SKU:



1. From the tree in the application rules side panel, choose Quality Control > Activities. The Activity Search window is displayed, with the list of activities.
2. In the top right corner, choose  in the Activity Search window to access Putaway Preferences window.
3. In the Putaway Preferences window, choose the Single-SKU tab.
4. The Single-SKU tab window is displayed, with the list of putaway preferences.
5. Select the putaway preference to be modified. Choose .
6. The Putaway Preference Details window is displayed.

7. Enter information in the applicable fields. Refer [Table 6–17](#) for field value descriptions.
8. Choose .

Only the description and item classification values not previously used may be specified. Additional zone priorities may also be specified. For all other changes, the preference must be deleted.

#### 6.4.1.4 Deleting a Putaway Preference for Single SKU

To delete a putaway preference for single SKU:

1. From the tree in the application rules side panel, choose Quality Control > Activities. The Activity Search window is displayed, with the list of activities.
2. In the top right corner, choose  in the Activity Search window to access Putaway Preferences window.
3. In the Putaway Preferences window, choose the Single-SKU tab.
4. The Single-SKU tab window is displayed, with the list of putaway preferences.
5. Select the putaway preference to be deleted.
6. Choose .

### 6.4.2 Setting Up Putaway Preference for Multi-SKU/Multi-Level Container


The preferences for the putaway of a multi-level case or pallet are specified here. This also applies to multi-level CASE with LPN and PALLET with LPN.

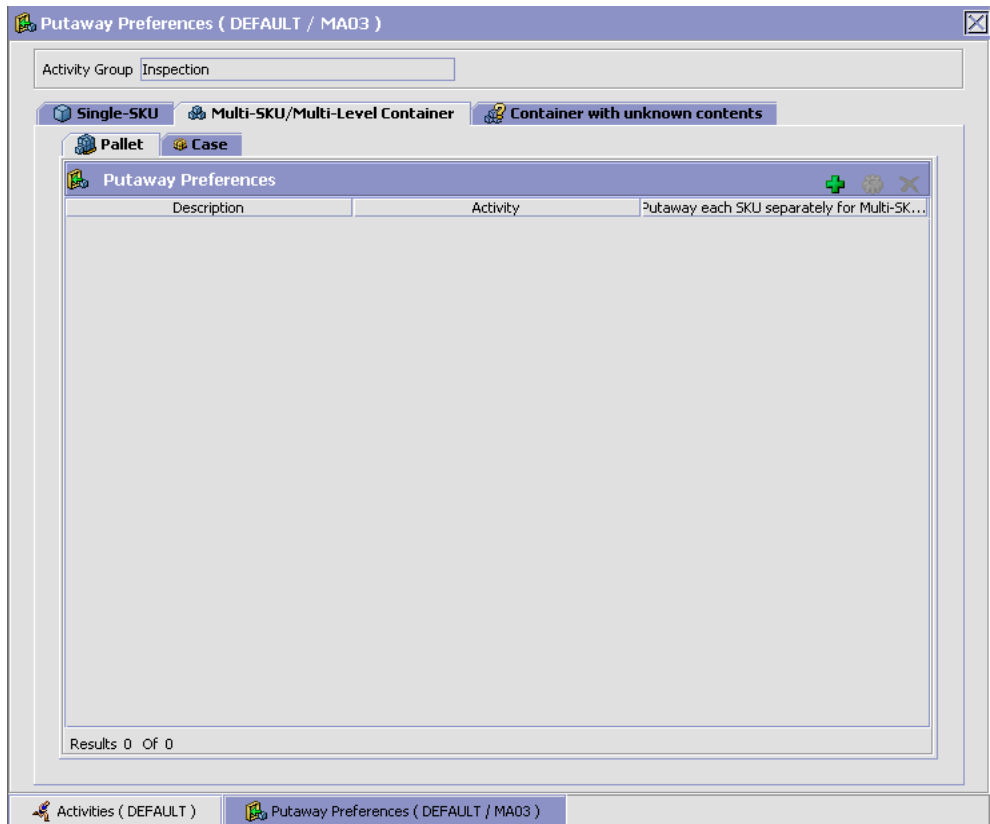
Use the Putaway Preferences for Multi-Level SKU set-up for:

- [Creating a Putaway Preference for Multi-SKU/Multi-Level Container](#)
- [Creating a New Putaway Preference for a Multi-SKU/Multi-Level Container from an Existing Putaway Preference](#)
- [Modifying a Putaway Preference for Multi-SKU/Multi-Level Container](#)
- [Deleting a Putaway Preference for Multi-SKU/Multi-Level Container](#)

### 6.4.2.1 Creating a Putaway Preference for Multi-SKU/Multi-Level Container

To create a putaway preference for multi-SKU/multi-level container:

1. From the tree in the application rules side panel, choose Quality Control > Activities. The Activity Search window is displayed, with the list of activities.
2. In the top right corner, choose . The Putaway Preferences window is displayed.
3. In the Putaway Preferences window, choose the Multi-SKU/Multi-Level Container tab. The Multi-SKU/Multi-Level Container tab window is displayed.







Putaway preferences for multi-level cases or pallets are specified separately:

- [Setting Up Putaway Preferences for a Multi-Level Pallet](#)
- [Setting Up Putaway Preference for a Multi-Level Case](#)

#### **6.4.2.1.1 Setting Up Putaway Preferences for a Multi-Level Pallet**

To set up putaway preference for a multi-level pallet:

1. In the Multi-SKU/Multi-Level Container tab of Putaway Preferences window, choose the Pallet tab. The Pallet tab window is displayed.
2. In the Pallet tab window, choose .
3. The Putaway Preference Details window appears.
4. Enter information in the applicable fields. Refer [Table 6–19](#) for field value descriptions.
5. Choose .

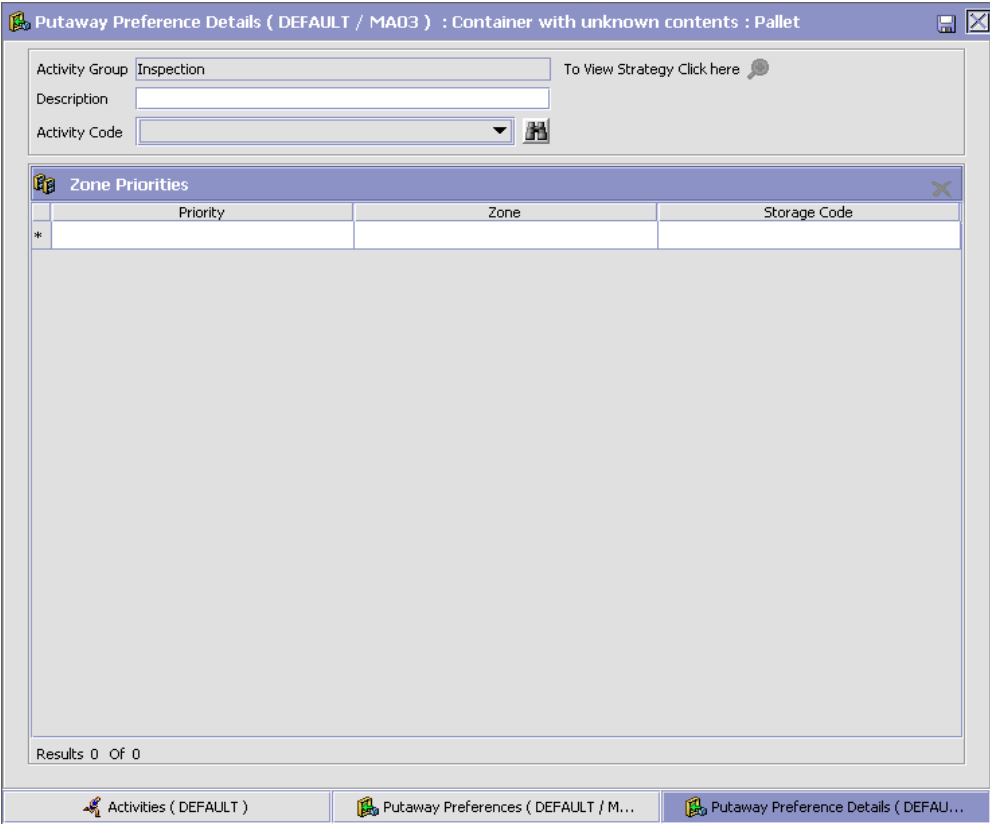



Table 6–19 Putaway Preference Details Window (Multi-Level Pallet)

Field	Description
Activity Group	This is automatically populated by the system as 'INSPECTION'.
To View Strategy Click here	Choose  to view or set up Putaway Strategy. For more details on setting up a putaway strategy see <a href="#">Setting Up Putaway Strategy for Multi-SKU/Multi-Level Containers - Pallets</a> .  Note: Putaway strategy may be specified for the putaway preferences after the preference is saved.

**Table 6–19 Putaway Preference Details Window (Multi-Level Pallet)**


Field	Description
Description	Enter a brief description for the putaway preference.
Activity Code	Choose the activity code for the putaway preference. This is a mandatory field.
Put away each SKU separately for Multi-SKU Pallets	Select if each SKU on the multi-SKU pallet is evaluated individually.  If selected, the putaway preferences for a single SKU are evaluated for the multi-SKU pallet. The Zone Priorities Panel is removed on this selection.
<b>Zone Priorities</b>	
Priority	Enter a number to represent the priority.  The priority is used to sequence the order in which the zone priorities are evaluated. For example, all storage code level priorities are to be evaluated first before generic priorities.  The priority needs to be a positive integer, greater than zero. This is mandatory.
Zone	Choose the relevant zone for putaway. This is a mandatory field.
Storage Code	Choose the storage code for the zone, if applicable.  This limits the locations being evaluated to the storage code specified. For example, putaway of hazardous items into a zone are restricted to the locations having the appropriate storage code.

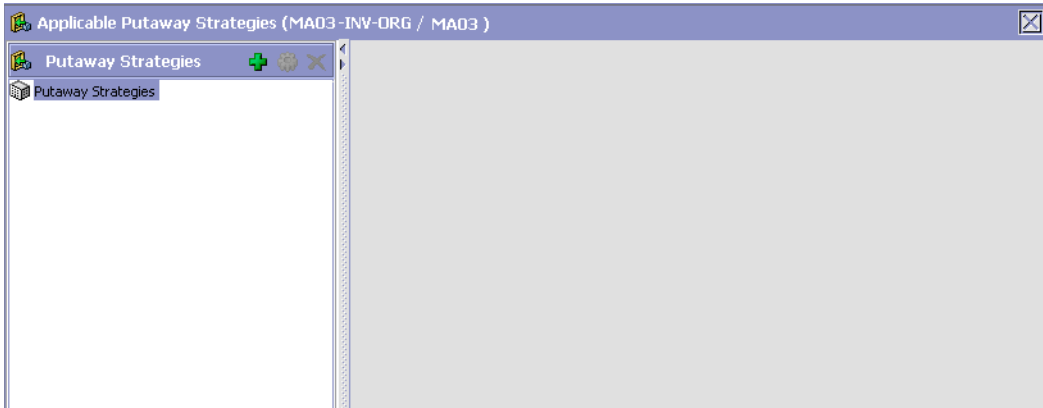
*Putaway strategy may be specified for the putaway preferences after the preference is saved. This is specified at an item classification and UOM level, if applicable.*



### **Setting Up Putaway Strategy for Multi-SKU/Multi-Level Containers - Pallets**

You can set up putaway strategies to putaway applicable inventory from a source zone to a target zone, based on the strategy specified.

To set up putaway strategy for multi-SKU/multi-level container pallets:

1. In the Putaway Preference Details : Multi-SKU/multi-level Containers : Pallet window, choose .
2. The Applicable Putaway Strategies window is displayed.



3. Choose  in the Putaway Strategies panel. The Putaway Strategy Details window appears in the right panel.
4. Enter information in the applicable fields. See the Putaway Strategy Details Window table for field value descriptions.
5. Choose .

**Putaway Strategy Details**

Description  UOM

Item Classification
 

Product Line

StorageType

Product Line

**System Directed Putaway Task Types**

	Source Zone	Target Zone	Container Type	Task Type
*				

Results 0 Of 0

**Ad Hoc Task Types**




	Source Zone	Target Zone	Container Type	Task Type
*				

Results 0 Of 0

**Table 6–20 Putaway Strategy Details Window**

Field	Description
Description	Enter a description for the Putaway Strategy.
UOM	Select the UOM for the Putaway Strategy, if applicable.  Note: The UOM will be defaulted in instances where it has been specified in the Putaway Preference Details screen.

**Table 6–20 Putaway Strategy Details Window**

Field	Description
<b>Item Classification</b>	List of putaway item classifications for the Enterprise are displayed. An example, Product Line is shown below.
Product Line	Choose relevant product line item classification for the putaway activity.  Choose  . In the Classification Values window, select the applicable product line classification.
<b>System Directed Putaway Task Types</b>	<b>Displays the list of existing system directed putaway task types.</b>  <b>You may use  to delete an existing system directed putaway task type.</b>
Source Zone	Select the source zone where inventory is available.
Target Zone	Select the target zone where you want to move the inventory.
Container Type	Select the container type to be used to move the inventory from the source zone to the target zone. Typical values are Case and Pallet.
Task Type	Select the Putaway Task Type applicable to this putaway strategy. This field displays the list of existing system directed task types that belong to the 'PUTAWAY' activity group.
<b>Ad hoc Task Types</b>	<b>Displays the list of existing ad hoc task types.</b>  <b>You may use  to delete an existing ad hoc task type.</b>
Source Zone	Select the source zone where inventory is available.
Target Zone	Select the target zone where you want to move the inventory.

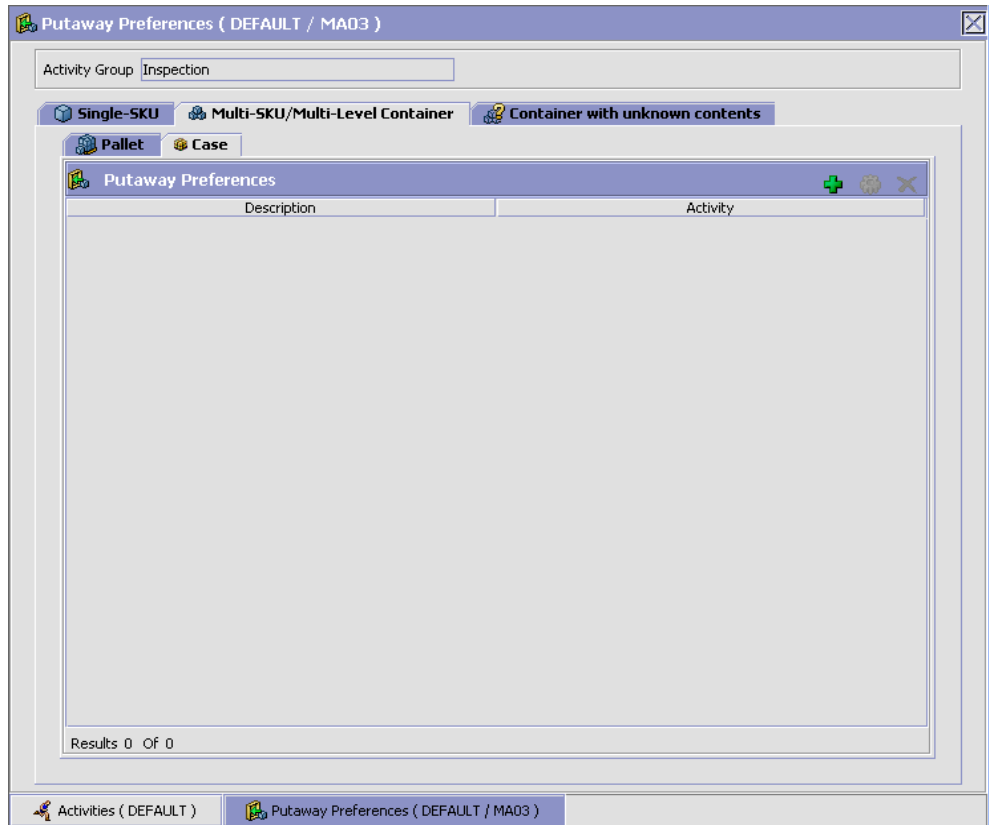
**Table 6–20 Putaway Strategy Details Window**



Field	Description
Container Type	Select the container type to be used to move the inventory from the source zone to the target zone. Typical values are Case and Pallet.
Task Type	Select the Putaway Task Type applicable to this putaway strategy. This field displays the list of existing ad hoc task types that belong to the 'PUTAWAY' activity group.

#### 6.4.2.1.2 Setting Up Putaway Preference for a Multi-Level Case

To set up putaway preference for a multi-level case:


1. In the Multi-SKU/Multi-Level Container tab of Putaway Preferences window, choose the Case tab. The Case tab window is displayed.




2. In the Case tab window, choose .
3. The Putaway Preference Details window appears.
4. Enter information in the applicable fields. Refer [Table 6–21](#) for field value descriptions.
5. Choose .



**Putaway Preference Details ( DEFAULT / MA03 ) : Multi-SKU/Multi-Level Container : Case**

Activity Group:  To View Strategy Click here 

Description:

Activity Code:  


**Zone Priorities**

	Priority	Zone	Storage Code
*			

Results 0 Of 0

Activities ( DEFAULT ) Putaway Preferences ( DEFAULT / M... Putaway Preference Details ( DEFAU...

Table 6–21 Putaway Preference Details Window (Multi-Level Case)

Field	Description
Activity Group	This is automatically populated by the system as 'INSPECTION'.
To View Strategy Click here	<p>Choose  to view or set up Putaway Strategy. For more details on setting up a putaway strategy see <a href="#">Setting Up Putaway Strategy for Multi-SKU/Multi-Level Containers - Cases</a>.</p> <p>Note: Putaway strategy may be specified for the putaway preferences after the preference is saved.</p>

**Table 6–21 Putaway Preference Details Window (Multi-Level Case)**


Field	Description
Description	Enter a brief description for the putaway preference.
Activity Code	Choose the activity code for the putaway preference. This is a mandatory field.
<b>Zone Priorities</b>	
Priority	Enter a number to represent the priority.  The priority is used to sequence the order in which the zone priorities are evaluated. For example, all storage code level priorities are to be evaluated first before generic priorities.  The priority needs to be a positive integer, greater than zero. This is mandatory.
Zone	Choose the relevant zone for putaway. This is a mandatory field.
Storage Code	Choose the storage code for the zone, if applicable.  This limits the locations being evaluated to the storage code specified. For example, putaway of hazardous items into a zone are restricted to the locations having the appropriate storage code.

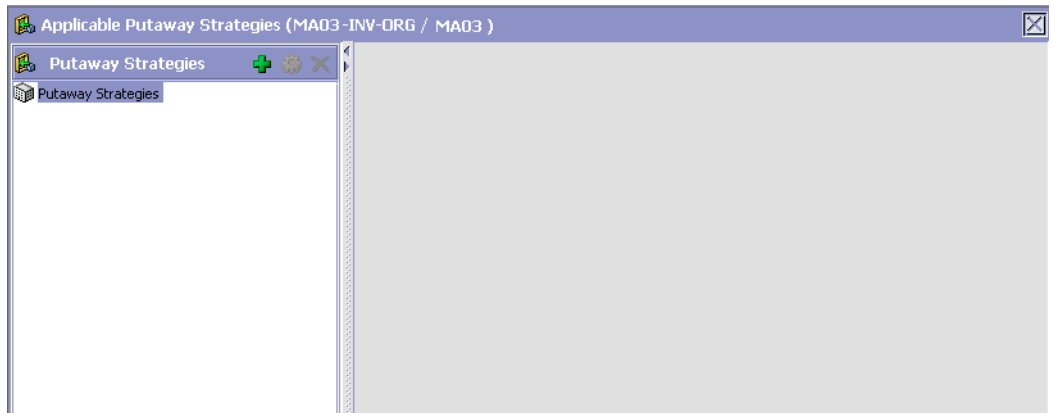
*Putaway strategy may be specified for the putaway preferences after the preference is saved. This is specified at an item classification and UOM level, if applicable.*



### Setting Up Putaway Strategy for Multi-SKU/Multi-Level Containers - Cases

You can set up putaway strategies to putaway applicable inventory from a source zone to a target zone, based on the strategy specified.

To set up putaway strategy for multi-SKU/multi-level container cases:

1. In the Putaway Preference Details : Multi-SKU/multi-level Containers : Case window, choose .
2. The Applicable Putaway Strategies window is displayed.



3. Choose  in the Putaway Strategies panel. The Putaway Strategy Details window appears in the right panel.
4. Enter information in the applicable fields. See the Putaway Strategy Details Window table for field value descriptions.
5. Choose .

Putaway Strategy Details

DescriptionStrategy for DVD-LockAndKey-EACHUOMCASE

Item Classification

Product LineDVD

StorageTypeLockAndKey

Product Line

System Directed Putaway Task Types

	Source Zone	Target Zone	Container Type	Task Type
*				

Results 0 Of 0

Ad Hoc Task Types




	Source Zone	Target Zone	Container Type	Task Type
*				

Results 0 Of 0

Table 6–22 Putaway Strategy Details Window




Field	Description
Description	Enter a description for the Putaway Strategy.
UOM	Select the UOM for the Putaway Strategy, if applicable. Note: The UOM will be defaulted in instances where it has been specified in the Putaway Preference Details screen.

**Table 6–22 Putaway Strategy Details Window**

Field	Description
<b>Item Classification</b>	List of putaway item classifications for the Enterprise are displayed. An example, Product Line is shown below.
Product Line	Choose relevant product line item classification for the putaway activity.  Choose  . In the Classification Values window, select the applicable product line classification.
<b>System Directed Putaway Task Types</b>	<b>Displays the list of existing system directed putaway task types.</b>  <b>You may use  to delete an existing system directed putaway task type.</b>
Source Zone	Select the source zone where inventory is available.
Target Zone	Select the target zone where you want to move the inventory.
Container Type	Select the container type to be used to move the inventory from the source zone to the target zone. Typical values are Case and Pallet.
Task Type	Select the Putaway Task Type applicable to this putaway strategy. This field displays the list of existing system directed task types that belong to the 'PUTAWAY' activity group.
<b>Ad hoc Task Types</b>	<b>Displays the list of existing ad hoc task types.</b>  <b>You may use  to delete an existing ad hoc task type.</b>
Source Zone	Select the source zone where inventory is available.
Target Zone	Select the target zone where you want to move the inventory.
Container Type	Select the container type to be used to move the inventory from the source zone to the target zone. Typical values are Case and Pallet.
Task Type	Select the Putaway Task Type applicable to this putaway strategy. This field displays the list of existing ad hoc task types that belong to the 'PUTAWAY' activity group.

### 6.4.2.2 Creating a New Putaway Preference for a Multi-SKU/Multi-Level Container from an Existing Putaway Preference


To create a new putaway preference for multi-SKU/multi-level container from an existing putaway preference:



1. From the tree in the application rules side panel, choose Quality Control > Activities. The Activity Search window is displayed, with the list of activities.
2. In the top right corner, choose . The Putaway Preferences window is displayed.
3. In the Putaway Preferences window, choose the Multi-SKU/Multi-Level Container tab.
4. The Multi-SKU/Multi-Level Container tab window is displayed, with the list of putaway preferences.
5. Select the putaway preference to be copied from. Choose .
6. The Putaway Preference Details window is displayed.
7. Enter information in the applicable fields. For more information about modifying the fields, refer to [Section 6.4.2.1.1, "Setting Up Putaway Preferences for a Multi-Level Pallet"](#) on page 513 and [Section 6.4.2.1.2, "Setting Up Putaway Preference for a Multi-Level Case"](#) on page 519.
8. Choose .

### 6.4.2.3 Modifying a Putaway Preference for Multi-SKU/Multi-Level Container

Once a Putaway Preference for Multi-SKU/Multi-Level Container has been created, it can be modified.

To modify a putaway preference for multi-SKU/multi-level container:



1. From the tree in the application rules side panel, choose Quality Control > Activities. The Activity Search window is displayed, with the list of activities.
2. In the top right corner, choose . The Putaway Preferences window is displayed.

3. In the Putaway Preferences window, choose the Multi-SKU/Multi-Level Container tab.
4. The Multi-SKU/Multi-Level Container tab window is displayed, with the list of putaway preferences.
5. Select the putaway preference to be modified. Choose .
6. The Putaway Preference Details window is displayed.
7. Enter information in the applicable fields. For more information about modifying the fields, refer to [Section 6.4.2.1.1, "Setting Up Putaway Preferences for a Multi-Level Pallet"](#) on page 513 and [Section 6.4.2.1.2, "Setting Up Putaway Preference for a Multi-Level Case"](#) on page 519.
8. Choose .

The activity code corresponding to the preference cannot be modified. The preference must be deleted and recreated.

#### 6.4.2.4 Deleting a Putaway Preference for Multi-SKU/Multi-Level Container

To delete a putaway preference for multiple SKU:

1. From the tree in the application rules side panel, choose Quality Control > Activities. The Activity Search window is displayed, with the list of activities.
2. In the top right corner, choose . The Putaway Preferences window is displayed.
3. In the Putaway Preferences window, choose the Multi-SKU/Multi-Level Container tab.
4. The Multi-SKU/Multi-Level Container tab window is displayed, with the list of putaway preferences.
5. Select the putaway preference to be deleted.
6. Choose .

### 6.4.3 Setting Up Putaway Preferences for Container with Unknown Contents

The preferences for the putaway of container with unknown contents are specified here. This applies to case and pallet with LPN where contents are not known.


For example, pre-receipt steps during receiving or returns where LPN labels may be scanned. Also, this applies to containers that are cross-docked to shipping lane upon receipt in merge in-transit centers.

Use Putaway Preferences for Container with Unknown Contents set-up for:

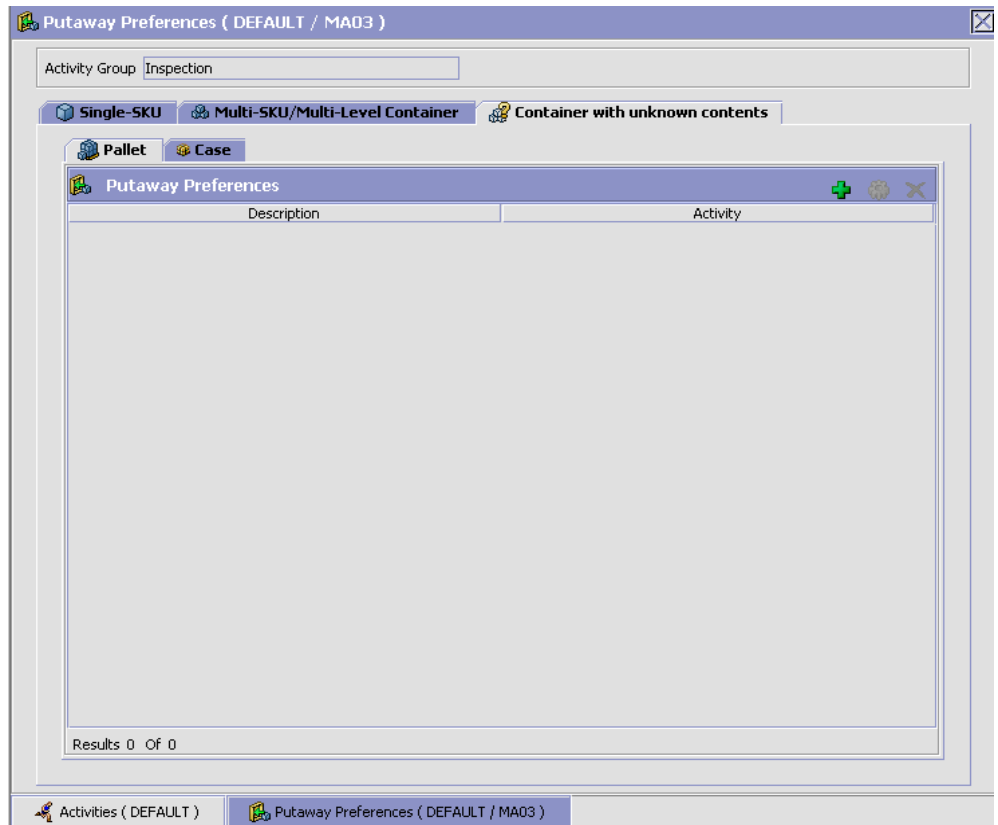
- [Creating a Putaway Preference for Container with Unknown Contents](#)
- [Creating a New Putaway Preference for Container with Unknown Contents from an Existing Putaway Preference](#)
- [Modifying a Putaway Preference for Container with Unknown Contents](#)
- [Deleting a Putaway Preference for Container with Unknown Contents](#)

#### 6.4.3.1 Creating a Putaway Preference for Container with Unknown Contents

To create a putaway preference for container with unknown contents:

1. From the tree in the application rules side panel, choose Quality Control > Activities. The Activity Search window is displayed, with the list of activities.
2. In the top right corner, choose . The Putaway Preferences window is displayed.
3. In the Putaway Preferences window, choose the Container with Unknown Contents tab. The Container with Unknown Contents tab window is displayed.







Putaway preferences are separately specified for a pallet and case:

- [Setting Up Putaway Preference for a Pallet](#)
- [Setting Up Putaway Preference for a Case](#)

#### 6.4.3.1.1 Setting Up Putaway Preference for a Pallet

To set up putaway preference for a pallet:

1. In the Container with Unknown Contents tab of Putaway Preferences window, choose the Pallet tab. The Pallet tab window is displayed.
2. In the Pallet tab window, choose .
3. The Putaway Preference Details window appears.

- 4. Enter information in the applicable fields. Refer [Table 6–23](#) for field value descriptions.
- 5. Choose .

Putaway Preference Details ( TP ) : Container with unknown contents : Pallet

Activity Group InspectionTo View Strategy Click here

Description

Activity Code

Zone Priorities

	Priority	Zone	Storage Code
*			


Results 0 Of 0

Activity Search ( DEFAULT / TP...

Putaway Preferences ( DEFAULT / T...

Putaway Preference Details ( TP...

**Table 6–23 Putaway Preference Details Window - Container with Unknown Contents Pallet Tab**


Field	Description
Activity Group	This is automatically populated by the system as 'INSPECTION'.
To View Strategy Click here	<p>Choose  to view or set up Putaway Strategy. For more details on setting up a putaway strategy see <a href="#">Setting Up Putaway Strategy for Containers with Unknown Contents - Pallets</a>.</p> <p>Note: Putaway strategy may be specified for the putaway preferences after the preference is saved.</p>
Description	Enter a description for the activity constraint.
Activity Code	Choose the activity code for the putaway preference. This is a mandatory field.
<b>Zone Priorities</b>	
Priority	<p>Enter a number to represent the priority.</p> <p>The priority is used to sequence the order in which the zone priorities are evaluated. For example, all storage code level priorities are to be evaluated first before generic priorities.</p> <p>The priority needs to be a positive integer, greater than zero. This is mandatory.</p>
Zone	Choose the relevant zone for putaway. This is a mandatory field.
Storage Code	<p>Choose the storage code for the zone, if applicable.</p> <p>This limits the locations being evaluated to the storage code specified. For example, putaway of hazardous items into a zone are restricted to the locations having the appropriate storage code.</p>

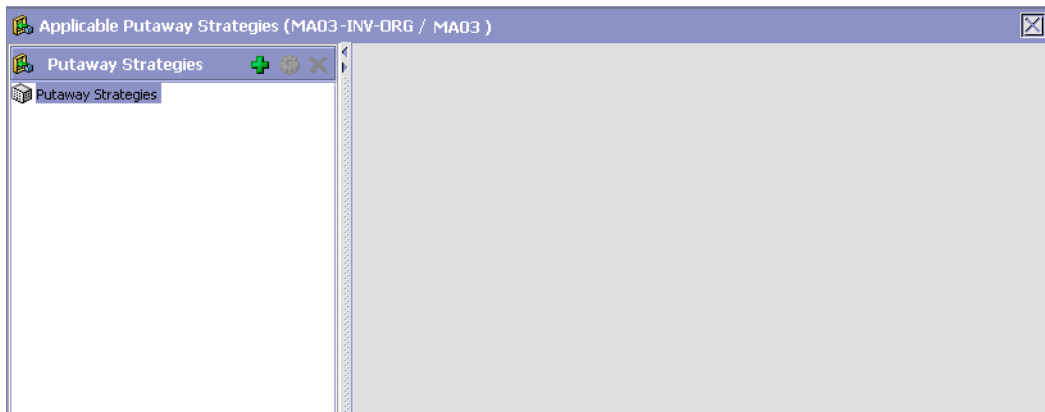
For example, pre-received pallets, when putaway is automatically sorted by shipment, SCAC utilizing the above fields.



### Setting Up Putaway Strategy for Containers with Unknown Contents - Pallets

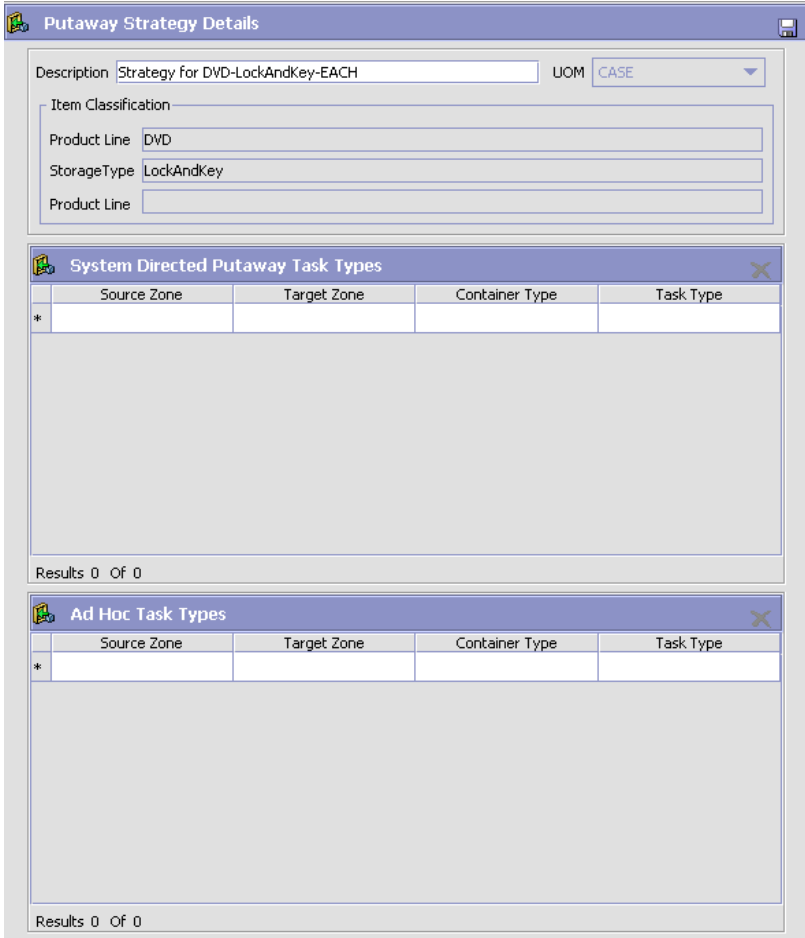
You can set up putaway strategies to putaway applicable inventory from a source zone to a target zone, based on the strategy specified.

To set up putaway strategy for container with unknown content pallets:

1. In the Putaway Preference Details : Container with unknown contents : Pallet window, choose .
2. The Applicable Putaway Strategies window is displayed.



3. Choose  in the Putaway Strategies panel. The Putaway Strategy Details window appears in the right panel.
4. Enter information in the applicable fields. See the Putaway Strategy Details Window table for field value descriptions.
5. Choose .



**Putaway Strategy Details**

Description: Strategy for DVD-LockAndKey-EACH UOM: CASE

Item Classification

Product Line: DVD

StorageType: LockAndKey

Product Line:

**System Directed Putaway Task Types**

	Source Zone	Target Zone	Container Type	Task Type
*				

Results 0 Of 0

**Ad Hoc Task Types**




	Source Zone	Target Zone	Container Type	Task Type
*				

Results 0 Of 0

**Table 6–24 Putaway Strategy Details Window**

Field	Description
Description	Enter a description for the Putaway Strategy.
UOM	Select the UOM for the Putaway Strategy, if applicable. Note: The UOM will be defaulted in instances where it has been specified in the Putaway Preference Details screen.

**Table 6–24 Putaway Strategy Details Window**

Field	Description
<b>Item Classification</b>	List of putaway item classifications for the Enterprise are displayed. An example, Product Line is shown below.
Product Line	Choose relevant product line item classification for the putaway activity.  Choose  . In the Classification Values window, select the applicable product line classification.
<b>System Directed Putaway Task Types</b>	<b>Displays the list of existing system directed putaway task types.</b>  <b>You may use  to delete an existing system directed putaway task type.</b>
Source Zone	Select the source zone where inventory is available.
Target Zone	Select the target zone where you want to move the inventory.
Container Type	Select the container type to be used to move the inventory from the source zone to the target zone. Typical values are Case and Pallet.
Task Type	Select the Putaway Task Type applicable to this putaway strategy. This field displays the list of existing system directed task types that belong to the 'PUTAWAY' activity group.
<b>Ad hoc Task Types</b>	<b>Displays the list of existing ad hoc task types.</b>  <b>You may use  to delete an existing ad hoc task type.</b>
Source Zone	Select the source zone where inventory is available.
Target Zone	Select the target zone where you want to move the inventory.

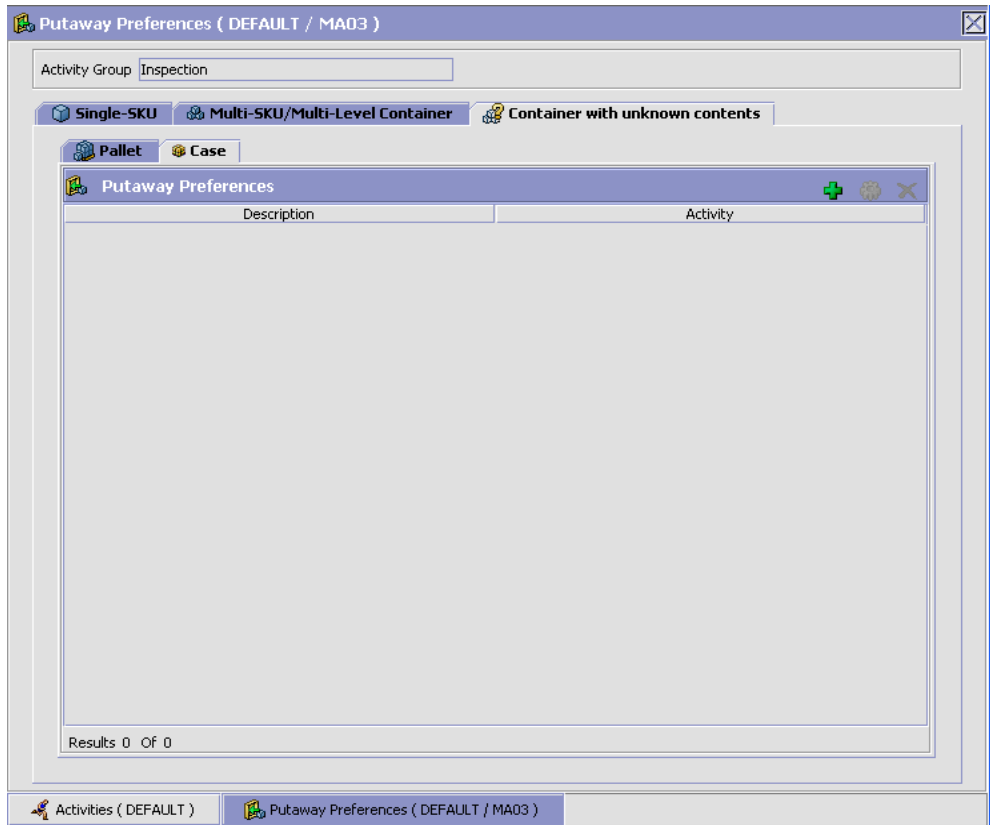
**Table 6–24 Putaway Strategy Details Window**



Field	Description
Container Type	Select the container type to be used to move the inventory from the source zone to the target zone. Typical values are Case and Pallet.
Task Type	Select the Putaway Task Type applicable to this putaway strategy. This field displays the list of existing ad hoc task types that belong to the 'PUTAWAY' activity group.

#### 6.4.3.1.2 Setting Up Putaway Preference for a Case

To set up putaway preference for a case:

1. In the Container with Unknown Contents tab of Putaway Preferences window, choose the Case tab. The Case tab window is displayed.



2. In the Case tab window, choose .
3. The Putaway Preference Details window appears.
4. Enter information in the applicable fields. Refer [Table 6–25](#) for field value descriptions.
5. Choose .



Putaway Preference Details ( DEFAULT / MA03 ) : Container with unknown contents : Case

Activity Group InspectionTo View Strategy Click here

Description

Activity Code

Zone Priorities

	Priority	Zone	Storage Code
*			


Results 0 Of 0

Activities ( DEFAULT )

Putaway Preferences ( DEFAULT / M...

Putaway Preference Details ( DEFAU...


**Table 6–25 Putaway Preference Details Window - Container with Unknown Contents Case Tab**

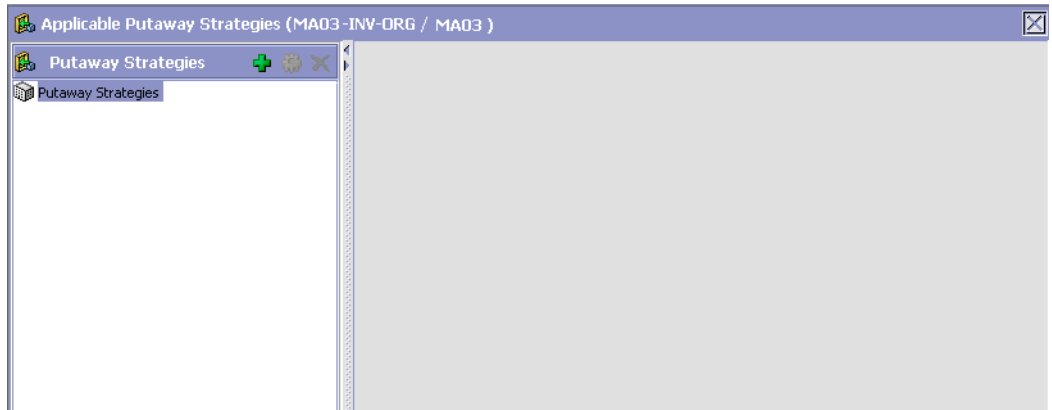
Field	Description
Activity Group	This is automatically populated by the system as 'INSPECTION'.
To View Strategy Click here	<p>Choose  to view or set up Putaway Strategy. For more details on setting up a putaway strategy see <a href="#">Setting Up Putaway Strategy for Containers with Unknown Contents - Cases</a>.</p> <p>Note: Putaway strategy may be specified for the putaway preferences after the preference is saved.</p>
Description	Enter a description for the activity constraint.
Activity Code	Choose the activity code for the putaway preference. This is a mandatory field.
<b>Zone Priorities</b>	
Priority	<p>Enter a number to represent the priority.</p> <p>The priority is used to sequence the order in which the zone priorities are evaluated. For example, all storage code level priorities are to be evaluated first before generic priorities.</p> <p>The priority needs to be a positive integer, greater than zero. This is mandatory.</p>
Zone	Choose the relevant zone for putaway. This is a mandatory field.
Storage Code	<p>Choose the storage code for the zone, if applicable.</p> <p>This limits the locations being evaluated to the storage code specified. For example, putaway of hazardous items into a zone are restricted to the locations having the appropriate storage code.</p>



### Setting Up Putaway Strategy for Containers with Unknown Contents - Cases

You can set up putaway strategies to putaway applicable inventory from a source zone to a target zone, based on the strategy specified.

To set up putaway strategy for container with unknown content cases:

1. In the Putaway Preference Details : Container with unknown contents : Case window, choose .
2. The Applicable Putaway Strategies window is displayed.



3. Choose  in the Putaway Strategies panel. The Putaway Strategy Details window appears in the right panel.
4. Enter information in the applicable fields. See the Putaway Strategy Details Window table for field value descriptions.
5. Choose .

Putaway Strategy Details

DescriptionStrategy for DVD-LockAndKey-EACHUOMCASE

Item Classification

Product LineDVD

StorageTypeLockAndKey

Product Line

System Directed Putaway Task Types

	Source Zone	Target Zone	Container Type	Task Type
*				

Results 0 Of 0

Ad Hoc Task Types




	Source Zone	Target Zone	Container Type	Task Type
*				

Results 0 Of 0

Table 6–26 Putaway Strategy Details Window




Field	Description
Description	Enter a description for the Putaway Strategy.
UOM	Select the UOM for the Putaway Strategy, if applicable. Note: The UOM will be defaulted in instances where it has been specified in the Putaway Preference Details screen.

**Table 6–26 Putaway Strategy Details Window**

Field	Description
<b>Item Classification</b>	List of putaway item classifications for the Enterprise are displayed. An example, Product Line is shown below.
Product Line	Choose relevant product line item classification for the putaway activity.  Choose  . In the Classification Values window, select the applicable product line classification.
<b>System Directed Putaway Task Types</b>	<b>Displays the list of existing system directed putaway task types.</b>  <b>You may use  to delete an existing system directed putaway task type.</b>
Source Zone	Select the source zone where inventory is available.
Target Zone	Select the target zone where you want to move the inventory.
Container Type	Select the container type to be used to move the inventory from the source zone to the target zone. Typical values are Case and Pallet.
Task Type	Select the Putaway Task Type applicable to this putaway strategy. This field displays the list of existing system directed task types that belong to the 'PUTAWAY' activity group.
<b>Ad hoc Task Types</b>	<b>Displays the list of existing ad hoc task types.</b>  <b>You may use  to delete an existing ad hoc task type.</b>
Source Zone	Select the source zone where inventory is available.
Target Zone	Select the target zone where you want to move the inventory.
Container Type	Select the container type to be used to move the inventory from the source zone to the target zone. Typical values are Case and Pallet.
Task Type	Select the Putaway Task Type applicable to this putaway strategy. This field displays the list of existing ad hoc task types that belong to the 'PUTAWAY' activity group.

### 6.4.3.2 Creating a New Putaway Preference for Container with Unknown Contents from an Existing Putaway Preference


To create a new putaway preference for container with unknown contents from an existing putaway preference:



1. From the tree in the application rules side panel, choose Quality Control > Activities. The Activity Search window is displayed, with the list of activities.
2. In the top right corner, choose . The Putaway Preferences window is displayed.
3. In the Putaway Preferences window, choose the Container with Unknown Contents tab.
4. The Container with Unknown Contents tab window is displayed, with the list of putaway preferences.
5. Select the putaway preference to be copied from. Choose .
6. The Putaway Preference Details window is displayed.
7. Enter information in the applicable fields. For more information about modifying the fields, refer to [Section 6.4.3.1.1, "Setting Up Putaway Preference for a Pallet"](#) on page 529 and [Section 6.4.3.1.2, "Setting Up Putaway Preference for a Case"](#) on page 535.
8. Choose .

### 6.4.3.3 Modifying a Putaway Preference for Container with Unknown Contents

Once a Putaway Preference for Container with Unknown Contents has been created, it can be modified.

To modify a putaway preference for container with unknown contents:



1. From the tree in the application rules side panel, choose Quality Control > Activities. The Activity Search window is displayed, with the list of activities.
2. In the top right corner, choose . The Putaway Preferences window is displayed.
3. In the Putaway Preferences window, choose the Container with Unknown Contents tab.

4. The Container with Unknown Contents tab window is displayed, with the list of putaway preferences.
5. Select the putaway preference to be modified. Choose .
6. The Putaway Preference Details window is displayed.
7. Enter information in the applicable fields. For more information about modifying the fields, refer to [Section 6.4.3.1.1, "Setting Up Putaway Preference for a Pallet"](#) on page 529 and [Section 6.4.3.1.2, "Setting Up Putaway Preference for a Case"](#) on page 535.
8. Choose .

*The activity code corresponding to the preference cannot be modified. The preference must be deleted and recreated.*

#### 6.4.3.4 Deleting a Putaway Preference for Container with Unknown Contents

To delete a putaway preference for container with unknown contents:

1. From the tree in the application rules side panel, choose Quality Control > Activities. The Activity Search window is displayed, with the list of activities.
2. In the top right corner, choose . The Putaway Preferences window is displayed.
3. In the Putaway Preferences window, choose the Container with Unknown Contents tab.
4. The Container with Unknown Contents tab window is displayed, with the list of putaway preferences.
5. Select the putaway preference to be deleted.
6. Choose .





## Configuring Picking

---

You can define the parameters and common codes used for determining algorithms and pipelines used for picking.

You can use the Picking branch for:

- [Defining the Outbound Pick Process Model](#)
- [Defining Pick Planning Parameters](#)
- [Defining Wave Cancellation Reasons](#)
- [Defining Purge Criteria](#)

### 7.1 Defining the Outbound Pick Process Model

Outbound Pick Process Model defines parameters and templates that distinguish a process type.

A **process type pipeline** is a series of transactions and statuses that guide document types, such as a Return Order, through a predefined process. A pipeline consists of the different statuses a document goes through during fulfillment, negotiation, shipment, or receipt. You can also set up transactions consisting of events, actions, and conditions, as they pertain to the pipeline you are configuring.

#### Repositories

A repository is a logical collection of entities that define the business process workflow.

The following entities are included in a repository:

- Pipelines
- Transactions

- Statuses
- Conditions
- Actions
- Services

Yantra 7x provides a base repository for each of the system defined process types. Some of the entities within a repository are copied when creating a new document type. For more information about creating a new document type, see the *Yantra 7x Platform Configuration Guide*.

The process of outbound picking is modeled through a pipeline. This represents the process configuration that is unique to a warehouse. A warehouse may also specify unique processes for each participating enterprise.

### 7.1.1 Pipeline Determination

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**Important:** Pipeline determination rules are NOT used for outbound picking pipelines. As part of the shipment group configuration you can associate the pipeline to be used. For more information about associating a pipeline with a shipment group, see [Section 7.2.1.3, "Defining a Shipment Group's Advanced Parameters"](#) on page 599.

---

#### 7.1.1.1 Condition Variables for Pipeline Determination

When using conditions for pipeline determination, the following condition variables can be used:

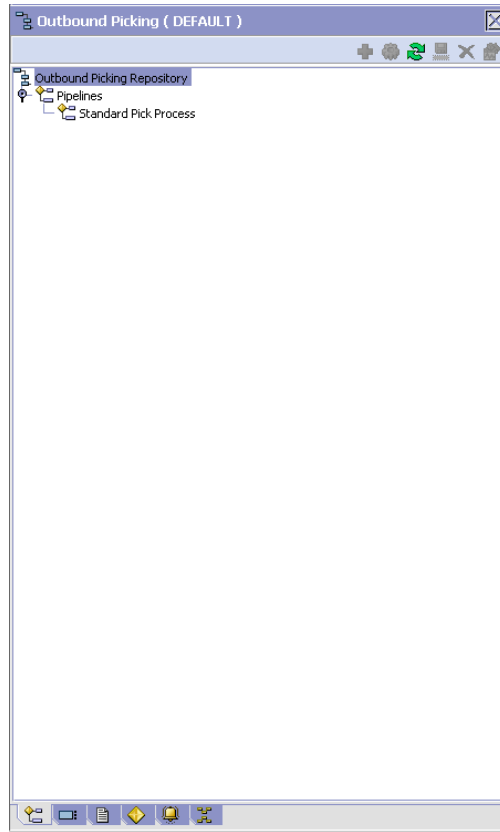
- Activity Group ID
- Shipment Group ID

### 7.1.2 Pipelines

For more information about Pipelines, see *Yantra 7x Platform Configuration Guide*.

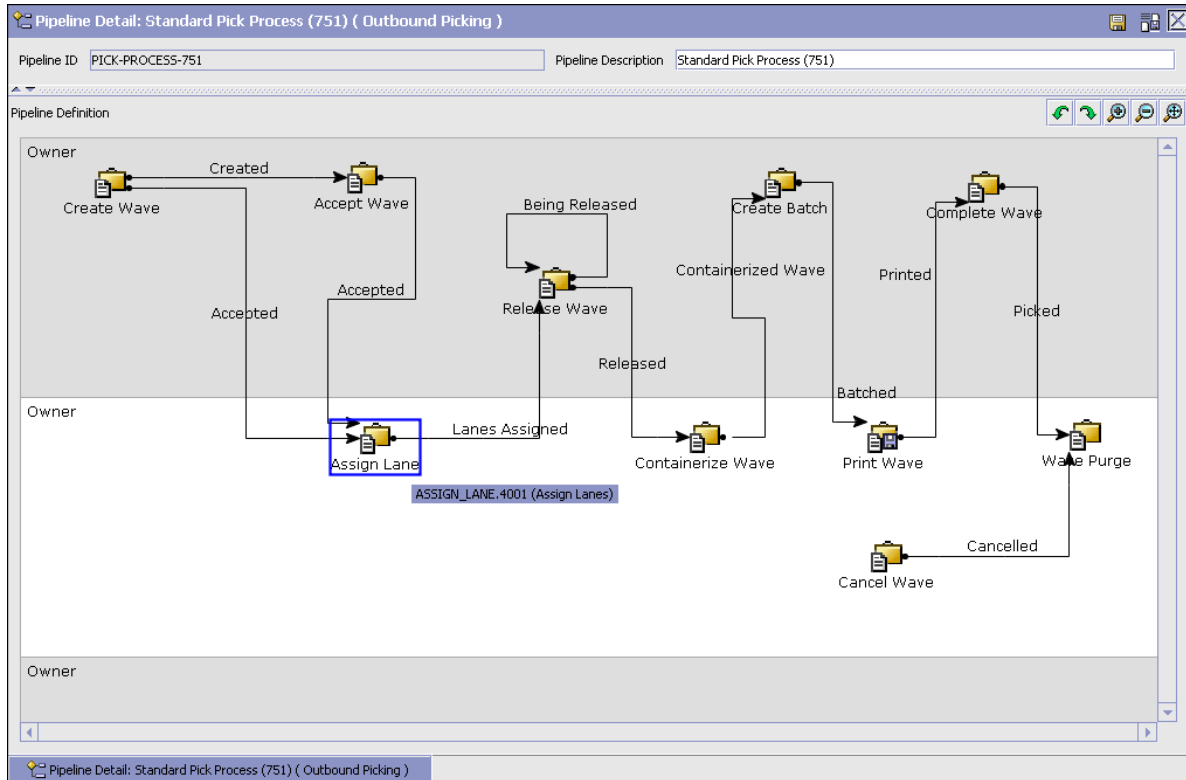
To view the outbound picking pipeline details:

1. From the tree in the application rules side panel, choose Picking > Outbound Picking > Pick Process Model. The Outbound Picking window displays.



2. In the Outbound Picking window, choose Standard Pick Process. The Pipeline Detail: Standard Pick Process (Outbound Picking) window displays.

For more information about creating and modifying a Pipeline, see the *Yantra 7x Platform Configuration Guide*.




### 7.1.3 Transactions

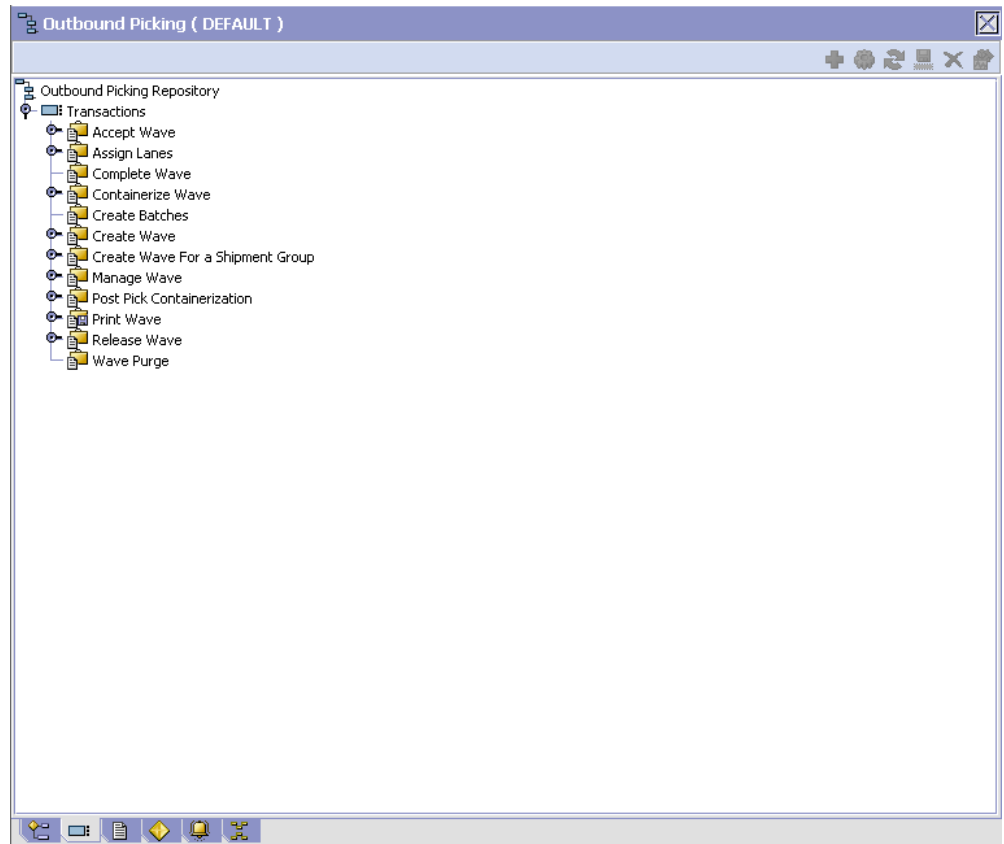
Every process type has a set of base transactions defined for it. A transaction is a logical unit of work that is necessary for performing activity within Yantra 7x. Base transactions are predefined transactions that contain information about how the transaction behaves, such as how many copies of a transaction can be kept in a process type and whether or not it can have configurable base pick and drop statuses. Base transactions can be used to create new transactions. These transactions can be changed within the limits defined in the base transaction.

For more information about Transactions, see *Yantra 7x Platform Configuration Guide*.

To view the transaction details for an outbound picking pipeline:

1. From the tree in the application rules side panel, choose Picking > Pick Process Model. The Outbound Picking window displays.
2. In the Outbound Picking window, choose .
3. The Transactions tab window displays.

For more information about creating and modifying Transactions, see *Yantra 7x Platform Configuration Guide*.



**Table 7–1 Outbound Picking Pipeline - Transactions Tab Window**

Field	Description
Accept Wave	This transaction represents that a wave must be accepted before continuing through the pipeline.
Assign Lanes	This transaction represents assigning shipments in a wave to a particular lane. From this lane the shipments are packed and loaded onto the appropriate carrier.
Complete Wave	This transaction represents a wave being completed.
Containerize Wave	This transaction represents shipments in a wave being packed into the appropriate containers at the time the pick is performed.
Create Batches	This transaction represents batch waves being created for batch picking.
Create Wave	This transaction represents a wave being generated by the system.
Create Wave For a Shipment Group	This transaction represents a wave being generated by the system for a particular shipment group.
Manage Wave	The transaction represents a period in which any adjustments can be made to a wave.
Post Pick Containerization	This transaction represents shipments in a wave being packed into the appropriate containers any time after the pick has performed.
Print Wave	This transaction represents a wave being printed by the system.
Release Wave	This transaction represents a wave being released by the system. Pick tasks and replenish tasks will also be created during this process, if necessary.
Wave Purge	This transaction represents a wave may now be purged (moved out of) from the tables.  For more information about purge criteria, see <a href="#">Section 7.4, "Defining Purge Criteria"</a> on page 610

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**Note:** To print UCC-128 Container Labels in instances where system-defined packing is followed, enable the ON\_SUCCESS event of the POST\_PICK\_CNTR (Post Pick Containerization) transaction.


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### 7.1.4 Statuses

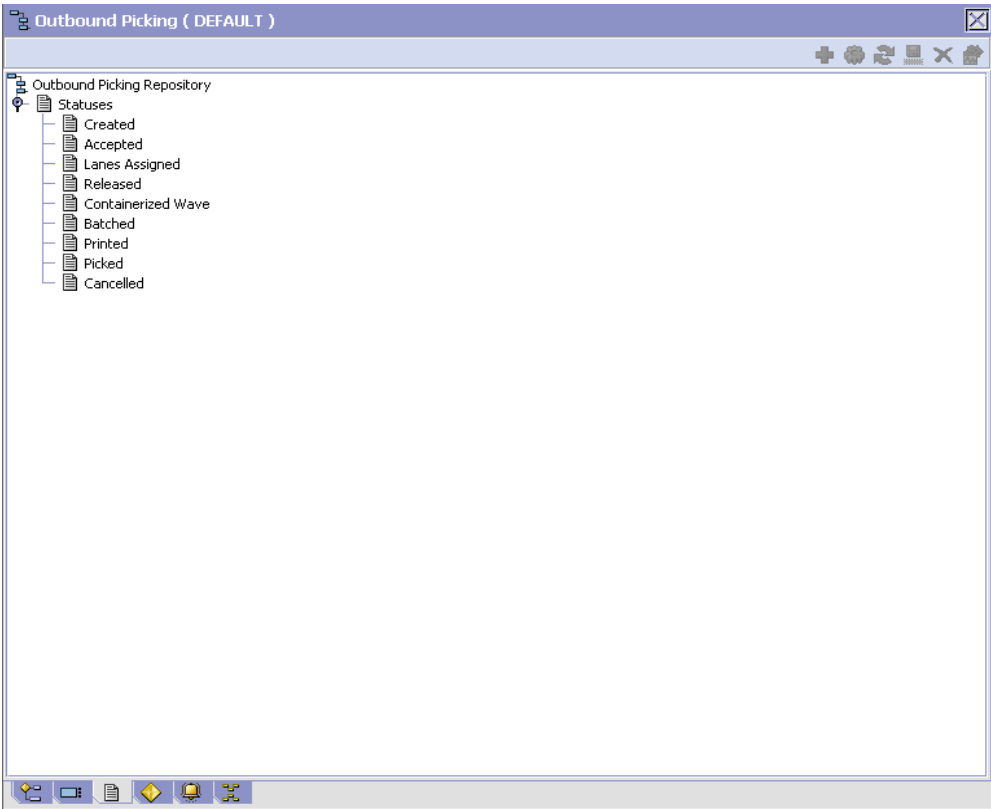
**Statuses** are the actual states that a document moves through in the pipeline. A transaction can contain two types of statuses, a drop status and a pickup status. A document is moved into a **drop status** when the events and conditions of a transaction have been completed. A **pickup status** takes the document from the previous drop status and moves it through the next transaction. Created and Scheduled are examples of statuses.

For more information about Statuses, see *Yantra 7x Platform Configuration Guide*.

To view the status details of an outbound picking pipeline:

1. From the tree in the application rules side panel, choose Picking > Pick Process Model. The Outbound Picking window displays.
2. In the Outbound Picking window, choose .
3. The Statuses tab window displays.

For more information about creating and modifying Statuses, see *Yantra 7x Platform Configuration Guide*.



**Table 7–2 Outbound Picking Pipeline - Statuses Tab Window**

Field	Description
Created	This indicates that the wave has been created. This corresponds to 'Create Wave' and 'Create Wave For a Shipment Group' transactions.
Accepted	This indicates that the wave has been accepted. This corresponds to 'Accept Wave' transaction.
Lanes Assigned	This indicates that shipments in the wave have been assigned to the proper lanes to be loaded to a carrier. This corresponds to the 'Assign Lane' transaction.



**Table 7–2 Outbound Picking Pipeline - Statuses Tab Window**


Field	Description
Released	This indicates that the appropriate locations have been assigned for picking inventory for shipments in a wave. This corresponds to the 'Release Wave' transaction.
Containerized Wave	This indicates that shipments in a wave have been packed in their appropriate containers. This corresponds to the 'Containerize Wave' transaction.
Batched	This indicates that the wave has been batched for picking. This corresponds to the 'Create Batches' transaction.
Printed	This indicates that the wave has been printed for picking. This corresponds to the 'Print Wave' transaction.
Picked	This indicates that inventory has been picked for shipments in a wave.
Cancelled	This indicates that a wave have been cancelled.

### 7.1.5 Conditions

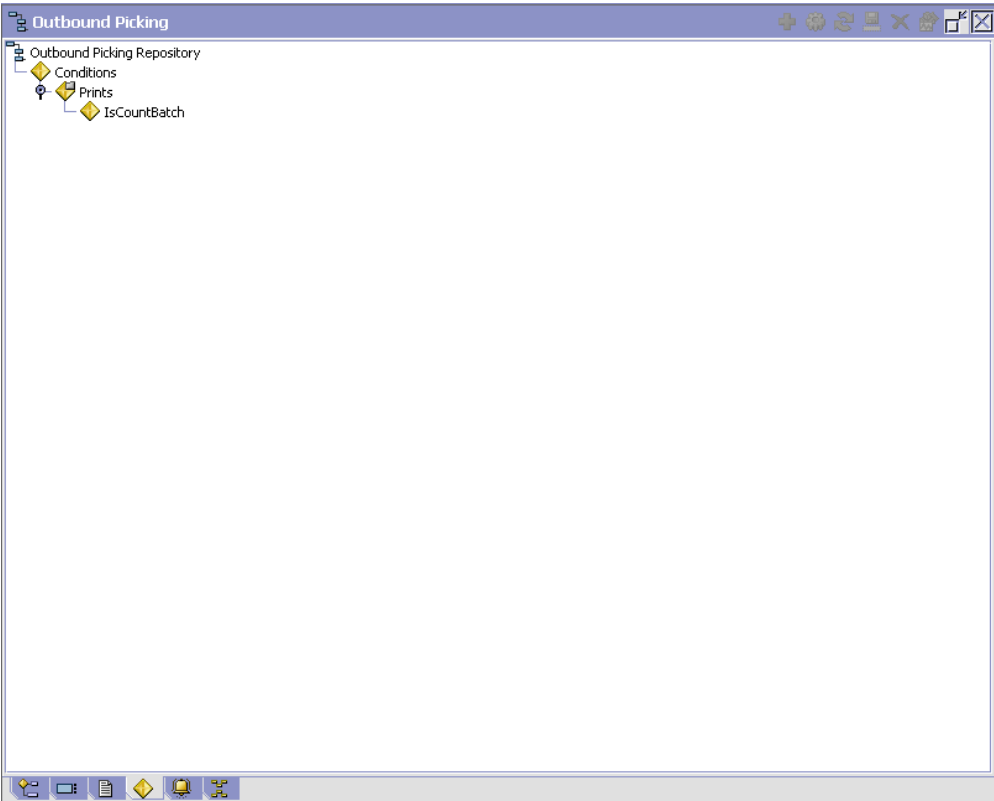
A **condition** matches document type attributes against decision points and routes the documents to different paths based on the specified attribute and value combinations. The document type attributes against which conditions can be created are predefined in Yantra 7x. You can use these attributes in any combination or you can create conditions that execute the appropriate application logic for specific circumstances.

For more information about Conditions, see *Yantra 7x Platform Configuration Guide*.

To view the condition details of an outbound picking pipeline:

1. From the tree in the application rules side panel, choose Picking > Pick Process Model. The Outbound Picking window displays.
2. In the Outbound Picking window, choose .
3. The Conditions tab window displays.

For more information about creating and modifying Conditions, see *Yantra 7x Platform Configuration Guide*.



**Table 7–3 Outbound Picking Pipeline - Conditions Tab Window**

Field	Description
<b>Prints</b>	
IsCountBatch	Condition that evaluates if the activity group for the batch is COUNT.


## 7.1.6 Actions

An **action** is a process or program that is triggered by an event. These processes and programs send user alert notifications and automatically resolve issues.

For example, when an order is released (the event), you can set an action to send the customer an e-mail.

For more information about Actions, see *Yantra 7x Platform Configuration Guide*.

To view the action details of an outbound picking pipeline:

1. From the tree in the application rules side panel, choose Picking > Pick Process Model. The Outbound Picking window displays.
2. In the Outbound Picking window, choose .
3. The Actions tab window displays.

For more information about viewing the action details, see [Section 3.12.3, "Actions"](#).


For more information about creating and modifying Actions, see *Yantra 7x Platform Configuration Guide*.

## 7.1.7 Service Definitions

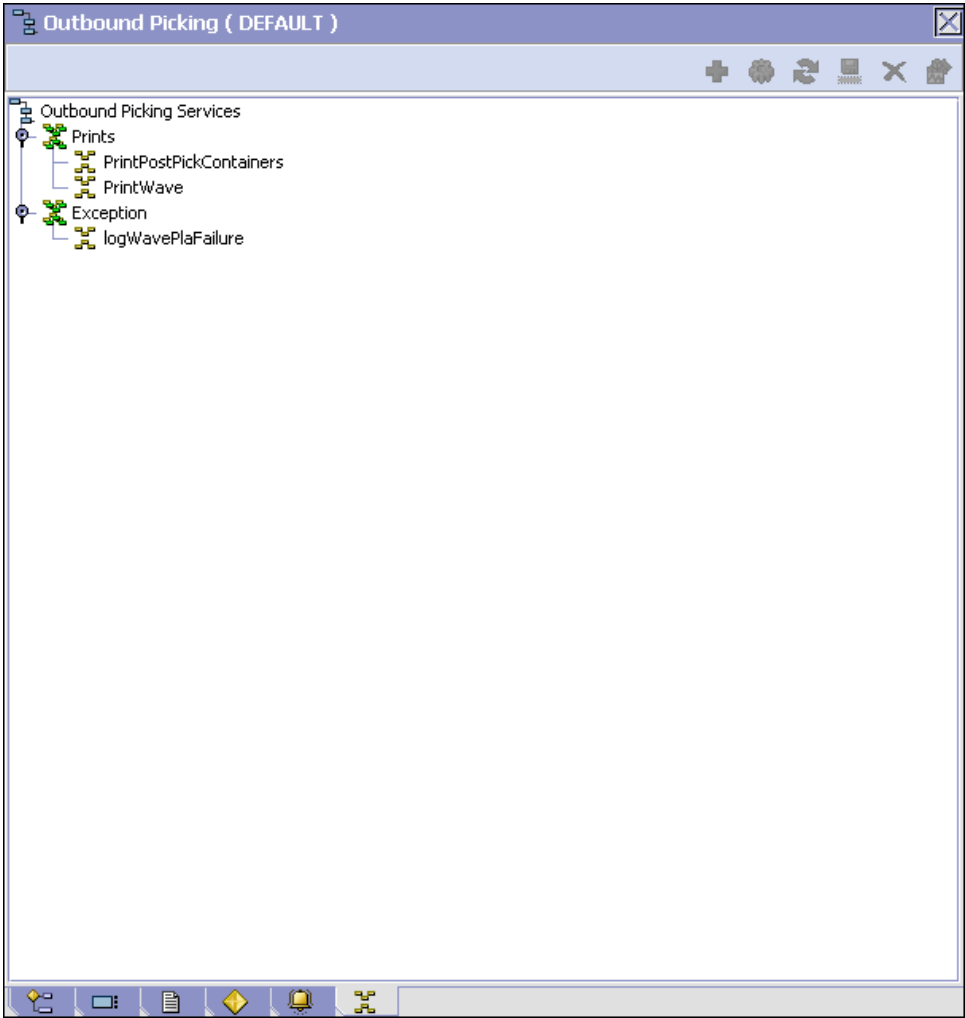
Service definitions are a representation of the logic that regulates document workflow services. The Service Builder is a graphical interface that enables you to create a graphical representation of these *services*.

For more information about Service Definitions, see *Yantra 7x Platform Configuration Guide*.

To view the service definition details of an outbound picking pipeline:

1. From the tree in the application rules side panel, choose Picking > Pick Process Model. The Outbound Picking window displays.
2. In the Outbound Picking Receipt window, choose .
3. The Service Definitions tab window displays.

For more information about creating and modifying Service Definitions, see *Yantra 7x Platform Configuration Guide*.



**Table 7–4 Outbound Picking Pipeline - Service Definition Tab Window**

Field	Description
<b>Prints</b>	
PrintPostPickContainers	The Print service for printing UCC-128 container labels for containers, when system-defined packing process is used.
PrintWave	The Print service for printing a Wave.
<b>Exceptions</b>	
LogWavePLAFailure	This raises an alert when errors are detected during wave release.

## 7.2 Defining Pick Planning Parameters

You can define the parameters used when planning your pick strategy. These parameters include shipment group determination, wave size constraints, and the wave release schedule.

You can use the Pick Planning branch for:

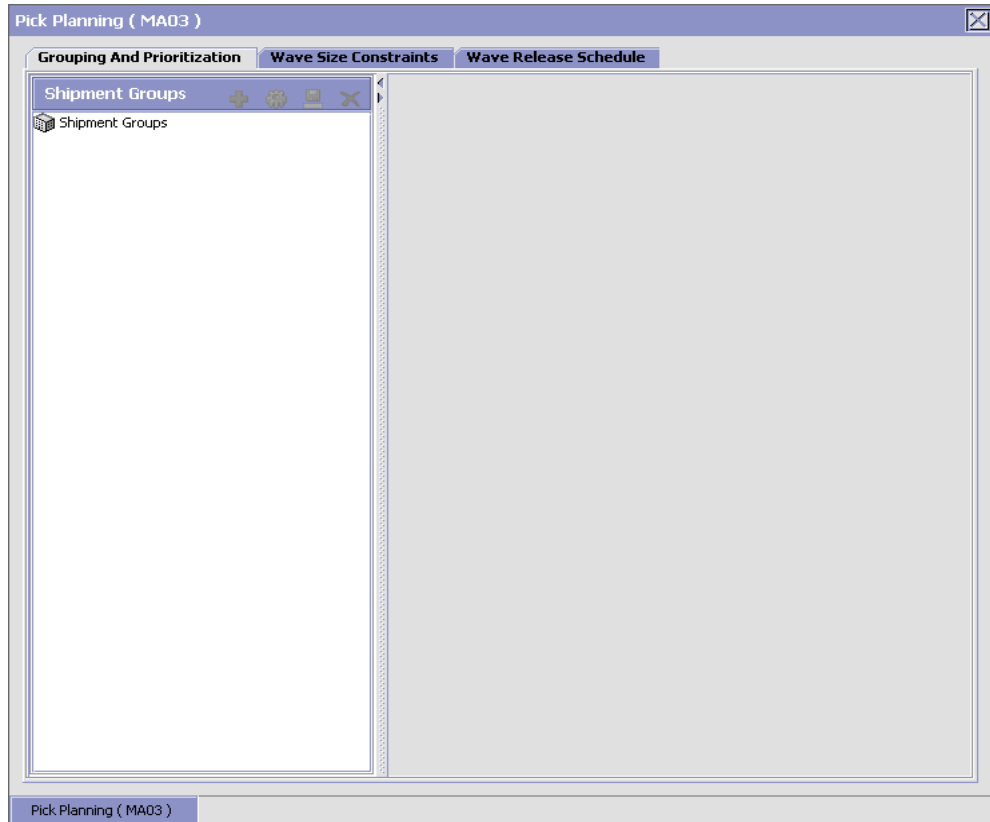
- [Defining Shipment Groups](#)
- [Defining Wave Size Constraints](#)
- [Defining a Wave Release Schedule](#)


### 7.2.1 Defining Shipment Groups

A *shipment group* is made up of shipments with similar attributes grouped together based on defined shipment selector parameters. *Shipment selectors* consist of shipment and item attributes used to distinguish and group shipments. For example, an emergency shipment group has shipments with Priority Code as 'E' or shipments expected to ship in four hours from now.

To define a shipment group:

1. From the tree in the application rules side panel, choose Picking > Pick Planning. The Pick Planning window displays in the work area.
2. Choose the Grouping And Prioritization tab. The Shipment Groups tree is displayed.




3. From the Shipment Groups tree, choose . The Shipment Group Details window displays in the right frame of the tab.

The screenshot shows two windows from a software application. The left window, titled 'Shipment Groups', contains a tree view with a single item labeled 'Shipment Groups'. The right window, titled 'Shipment Group Details', is for editing a specific group. It has tabs for 'Primary Info', 'Pick Strategy', 'Sort For Shipping', and 'Advanced'. The 'Primary Info' tab is active, showing fields for 'Shipment Group ID', 'Sequence #', and 'Description'. Below these are 'Priority' (set to 'Normal') and 'Effective From Date'/'Effective To Date' (with calendar icons). There are two expandable sections: 'Shipment Selectors' and 'Wave Size Constraints', both currently showing 'Results 0'.

4. In Shipment Group ID, enter the shipment group number or id.
5. In Sequence #, enter a sequence number that is unique within the ship node. Shipments are evaluated for applicable shipment selectors. Shipment groups use selectors to evaluated shipments. The sequence number determines the order by which shipment groups evaluate the shipments. Once a shipment matches up with a shipment group's selector criteria, it is added to that group.

**Note:** Shipment groups are displayed in the shipment group tree in descending order based on their sequence number. Lower sequence numbers take priority over higher sequence numbers, while evaluating shipment selectors.

6. In Description, enter a brief description of the shipment group.

7. In the Shipment Group Details window, choose the Primary Info tab.
8. From Priority, select the shipment group's priority. This priority is given to the wave and then assigned to the pick tasks for shipments belonging to this group.
9. In Effective From Date, enter the date from which the parameters defined for the shipment group are applicable.
10. In Effective To Date, enter the date to which the parameters defined for the shipment group are applicable.
11. On the Advanced Tab, select a pipeline.
12. Choose .

You can use the Shipment Group Details window for:

- [Defining a Shipment Group's Pick Strategy](#)
- [Defining a Shipment Group's Sort Strategy](#)
- [Defining a Shipment Group's Advanced Parameters](#)

You can use the Primary Info tab for:

- [Defining Shipment Selectors](#)
- [Defining Wave Size Constraints](#)

### 7.2.1.0.1 Defining Shipment Selectors

*Shipment selectors* consist of shipment and item attributes used to distinguish and group shipments. For a shipment to be added to a shipment group any one of the shipment selectors must be matched.

Shipment selector criteria include:

- Shipment attributes including customer, value, order type, pack and hold, VAS requirements, and priority
- Delivery attributes including mode and type of shipment, SCAC, and service
- Customer attributes including country and postal code
- Turnaround time attributes including request ship date and cancel dates



- Item classifications (for example, a heavy item in Electronics or a hazardous item in Chemicals)

A shipment selector is a combination of all defined attributes. For example, 'Priority Orders' shipment selector includes attributes such as order type, priority code and requested ship date.

---



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**Note:** Shipments having 'Requested Serial Number' on any line will not be assigned to a wave.

---

---

To define shipment selectors:

1. In the Primary Info tab of the Shipment Group Details window, choose  from the Shipment Selectors table. The Shipment Selector Details pop-up window displays.
2. Enter information in the applicable fields. Refer to [Table 7–5](#) for field value descriptions.
3. Choose .

Shipment Selector Details

Shipment Group ID

1

Description

Shipment Attributes

Document Type

Enterprise Code

Order Type

Buyer Organization

Priority Code

Shipment Value exceeds

Receiving Node

Ship Via

Delivery Method

Any

Ship

Pickup

Deliver

Shipment Mode

Carrier

Carrier Service Code is in

Ship To

Country

Postal Code Ranges From

=To :

Delinquent Shipments

Ship Date Past Due

Delivery Date or Cancel Date is past due

Delivery Date or Cancel Date is within following hours

At Risk / Regular Shipments

Ship Date is within following hours

Delivery Date or Cancel Date is within following hours

Shipment Types

Single Line Shipments

Pack and Hold

Shipments with Value Added Services

Shipment Line Attributes



Additional Criteria

Condition Name


Table 7–5 Shipment Selector Details Pop-Up Window

Field	Description
Shipment Group #	The shipment group number.
Description	Enter a brief description of the shipment criteria.
Shipment Attributes	
Document Type	Enter the document type associated with the shipment group.
Enterprise Code	Select the Enterprise associated with the shipment group.

**Table 7–5 Shipment Selector Details Pop-Up Window**

Field	Description
Priority Code	Enter the priority code associated with the shipment group.
Order Type	Enter the order type associated with the shipment group.
Shipment Value exceeds	Enter the amount and select the currency that you want shipments in the group to be greater than or equal to. For example, if you enter \$100 dollars, only shipments that have a value greater than or equal to \$100 are considered for this shipment group.
Buyer Organization	<p>You can specify the Buyer organization on the shipments you want to add to the group.</p> <p>Choose . The List of Values pop-up window displays. Select the blank line and choose a Buyer from the drop-down list menu. When you have finished adding Buyers, choose OK.</p>
Receiving Node	<p>You can specify the receiving node on the shipments you want to add to the group.</p> <p>Choose . The List of Values pop-up window displays. Select the blank line and choose a node from the drop-down list menu. When you have finished adding receiving nodes, choose OK.</p>
Ship Via	
Delivery Method	<p>Choose Ship if shipments in this group are shipped using a carrier.</p> <p>Choose Pickup if shipments in this group are picked up by customers at store locations.</p> <p>Choose Deliver if shipments in this group are delivered by a delivery service provider.</p>
Shipment Mode	Select the method used to ship shipments in this group. For example, select TL if shipments in this group belong to a Truckload.
Carrier	Select the carrier used to ship shipments in this group.

**Table 7–5 Shipment Selector Details Pop-Up Window**

Field	Description
Carrier Service Code is in	You can specify the carrier service used to ship shipments in this group.  Choose  . The List of Values pop-up window displays. Select the blank line and choose a carrier service from the drop-down list menu. When you have finished adding carrier services, choose OK.
Ship To	
Country	Select the country that shipments in this group are shipped to.
Postal Code Ranges	Enter the postal code range for the regions that shipments in this group are shipped to.
Delinquent Shipments	
Ship Date Past Due	Select this field if you want to group shipments that are past due in this shipment group.
Delivery Date or Cancel Date is past due	If you selected Ship Date Past Due, select this field if you want to group shipments that are past due based on the original delivery date of the shipment or the shipment's cancel date.
Delivery Date or Cancel Date is within following hours	If you selected Ship Date Past Due and want to specify the exact amount of hours after the delivery date or cancel date in which you want to group past due shipments, select this field and enter the number of hours.
At Risk/Regular Shipments	
Ship Date is within following hours	If you want to group shipments that are within a specified number of hours before their ship date, select this field and enter the number of hours.
Delivery Date or Cancel Date is within following hours	If you want to group shipments that are within a specified number of hours before their delivery date or cancel date, select this field and enter the number of hours.
Shipment Types	
Single Line Shipments	Select this field if you want to group shipments with only one line.

**Table 7–5 Shipment Selector Details Pop-Up Window**



Field	Description
Pack and Hold	Select this field if you want to group shipments that have been packed but are on hold.
Shipments with Value Added Services	Select this field if you want to group shipments that have value added services performed on them.
Shipment Line Attributes	
Classification Type this title varies depending upon the classifications that are displayed as per your business practices	A field used in Classifications is mapped to the Enterprise that you select for the shipment selector. For more information about configuring classifications, see the <i>Yantra 7x Product Management Configuration Guide</i> .  Enter the valid value for the classifications.
Additional Criteria	
Condition Name	Select the appropriate additional custom condition associated with the shipment group.

### 7.2.1.0.2 Defining Wave Size Constraints

You can define a wave size constraints for waves created for a shipment group. These constraints limit the size of a wave. A *wave* is an aggregation of picks across zones and orders that are consolidated to optimize pick and prioritize shipment.

**Important:** The wave size constraints you define for a shipment group are used in addition to the wave size constraints defined for the node. For more information about defining node level wave size constraints, see [Section 7.2.2, "Defining Wave Size Constraints"](#).

To define a shipment group's wave constraints:

1. In the Primary Info tab of the Shipment Group Details window, choose  from the Wave Size Constraints table. The Size Constraint Details pop-up window displays.
2. Enter information in the applicable fields. Refer to [Table 7–6](#) for field value descriptions.
3. Choose .

Yantra 7x Configurator

X

Size Constraint Details

DescriptionSC1

When shipment matches all the following conditions

Enterprise CodeDEFAULT

Shipment Mode

Carrier

☐ Shipment has more than one shipment line

☐ Shipment has more than one case

☐ And for shipments that have any lines having the following attributes

Product Line

Then ensure that wave size does not exceed any of the following constraints

# Loads

# Shipments

# Cases

Volume

CIN

**Table 7–6 Size Constraint Details Pop-Up Window**

Field	Description
Description	Enter a brief description of the size constraint parameters.
When shipment matches all the following conditions	When shipments meet all of the conditions specified in the following fields, then the constraints indicated in the option you select below are applied.
Enterprise Code	Select the Enterprise that you want apply constraints to.

**Table 7–6 Size Constraint Details Pop-Up Window**

Field	Description
Shipment Mode	Select the shipment mode that you want to apply constraints to. For example, if parcel carriers cannot ship a certain amount of cases in a shipment, you can select Parcel and enter the case constraint below.
Carrier	Select the carrier that you want to apply constraints to. For example, if there is a specific carrier that will not ship more than a specified volume, you can select the carrier and enter the volume constraint below.
Shipment has more than one shipment line	Select this field if you want to apply the constraints only against shipments that have more than one line.
Shipment has more than one case	Select this field if you want to apply the constraints only against shipments with more than one case.
And for shipments that have any lines having the following attributes	<p>Select this field if you want to use classifications to determine the wave constraint criteria.</p> <p>A field used in Classifications is mapped to the Enterprise that you select for the shipment selector. For more information about configuring classifications, see the <i>Yantra 7x Product Management Configuration Guide</i>.</p> <p>Enter the valid value for the classifications that are displayed according to your business practices.</p>
Then ensure that wave size does not exceed any of the following constraints	
# Loads	<p>Enter the number of loads to limit in a wave if the above criteria is met.</p> <p><b>Note:</b> This field is not displayed if the 'And for shipments that have any lines having the following attributes' option is selected.</p>
# Shipments	<p>Enter the number of shipments to limit in a wave if the above criteria is met.</p> <p><b>Note:</b> This field is not displayed if the 'And for shipments that have any lines having the following attributes' option is selected.</p>

**Table 7–6 Size Constraint Details Pop-Up Window**

Field	Description
# Cases	Enter the number of cases to limit in a wave if the above criteria is met.  <b>Note:</b> This field is not displayed if the 'And for shipments that have any lines having the following attributes' option is selected.
Volume	Enter the volume and select the applicable unit of measure to limit a wave to if the above criteria is met.  <b>Note:</b> This field is not displayed if the 'And for shipments that have any lines having the following attributes' option is selected.

### 7.2.1.1 Defining a Shipment Group's Pick Strategy

You can define a shipment group's pick strategy. A *pick strategy* is applied to each wave to determine the best method to pick inventory. A pick strategy consists of defined pick processes and pick location assignments.

The pick processes you can define are:

- **Item Picking**—a variation of batch picking where rather than picking a single order, all items from the zone are picked across shipments and later sorted and consolidated into individual orders or shipments.
- **Order Picking**— an order or shipment picker picks one order or shipment at a time in the assigned zones.
- **Batch Picking**— a picking where multiple orders or shipments are grouped into batches. In Batch Picking, constraints are defined at batch level for the zones, locations, and number of units.

To define a shipment group's pick strategy:

1. In the Shipment Group Details window, choose the Pick Strategy tab.



Pick Planning

Grouping And Prioritization   Wave Size Constraints   Wave Release Schedule

Shipment Groups

- Shipment Groups
  - Shipment Group 1
  - SingleLine
  - SG 3
  - SG 4

Shipment Group Details

Shipment Group ID: SG1   Sequence #: 1

Description: Shipment Group 1

Primary Info   Pick Strategy   Sort For Shipping   Advanced

☐ Use the same Pick Strategy as defined in Shipment Group Shipment Group 1
   
☒ Define a separate Pick Strategy for this Shipment Group

Pick Process Determination

☒ Use item picking when item pick conditions are met
   
☐ Otherwise, use order picking when order pick conditions are met
   
☐ Otherwise, use batch picking

Item Picking


Item Pick Rules   Item Pick PLA Configuration

Item Pick Rules

Description	Retrieve To	Task Type
-------------	-------------	-----------

2. Choose 'Use the same Pick Strategy as defined in Shipment Group' and select the applicable shipment group if you want to use a pick strategy already defined for an existing shipment group.
3. Choose 'Define a separate Pick Strategy for this Shipment Group' if you want to define a new pick strategy for this shipment group. The

Pick Process Determination and Item Pick PLA Configuration tabs appear.



4. Choose .

You can use the Pick Strategy Tab for:

- [Specifying Item Pick Rules](#)
- [Specifying Item Pick Location Configuration](#)
- [Specifying Order Pick Rules](#)
- [Specifying Order Pick Location Configuration](#)
- [Specifying Batch Pick Rules](#)
- [Specifying Batch Pick Location Configuration](#)

### 7.2.1.1.1 Specifying Item Pick Rules

To determine item pick rules:


1. From the Pick Strategy tab in the Shipment Group Details window, in the Pick Process Determination panel, choose Use Item picking when item pick conditions are met.
2. From the Item Pick Rules tab, choose . The Item Picking Rule pop-up window displays.
3. Enter information in the applicable fields. Refer to [Table 7–7](#) for field value descriptions.
4. Choose .

**Item Picking Rule**

Description

Enterprise Code

When all of the following conditions are met

NMFC Class  

Unit of Measure


Shipment ☐ has exactly one line ☐ with just one unit


Use item picking ☒ Regardless of demand variations  
☐ Based on demand variations as defined below

☐ If total quantity for an item in the wave exceeds

☐ If # of single unit shipments for an item in the wave exceeds

Retrieve items to ☒ A pack station  
☐ Dynamically slotted locations in following zones

Staging zones  

Pick from these zones using task type  







**Table 7–7 Item Picking Rule Pop-Up Window**

Field	Description
Description	Enter a brief description of the item picking condition.
Enterprise Code	Select the Enterprise you want to associate with the item picking condition.

**Table 7–7 Item Picking Rule Pop-Up Window**

Field	Description
When all of the following conditions are met	<p>When a shipment meets all of the conditions specified in the following fields, then the item picking parameters specified in the option you select below are applied.</p> <p>If these classifications are met along with the other conditions, item picking is performed.</p> <p>Note: The item classification names vary depending on the Enterprise and the classifications set for Retrieval type of tasks.</p> <p>'Item Classifications' can be entered in the pop up window only when an enterprise is selected and its 'Inventory Org' has classifications defined.</p>
Unit of Measure	Select the unit of measure you want to consider when using these item picking parameters for a shipment.
Shipment	<p>Select 'has exactly one line' if you want to consider the item picking parameters for shipments with only one line.</p> <p>Select 'with just one unit' if you want to consider the item picking parameters for shipments with only one item.</p>
Use item picking	<p>Choose 'Regardless of demand variations' if you want item picking to be performed regardless of any constraints when the above conditions are met.</p> <p>Choose 'Based on demand variations as defined below' if you want item picking to be performed based on the parameters you define below.</p>
If total quantity for an item in the wave exceeds	Select this field and enter the applicable quantity if you want to exclude cases or pallets from item picking if the quantity for that item exceeds the specified quantity. To exclude cases and/or pallets, you must select one or both of the following options if you select this field

**Table 7–7 Item Picking Rule Pop-Up Window**

Field	Description				
If # of single unit shipments for an item in the wave exceeds	Select this field and enter the applicable quantity if you do not want to consider items that have the unit of measure of CASE and a quantity of 1 when the number of single unit shipments for the item exceeds the number you specify.				
Retrieve items to	<p>Choose "A pack station" if you want to retrieve items to a pack station.</p> <p>Choose "Dynamically slotted locations in following zones" if you want to retrieve items to a staging location.</p> <table border="1"> <tr> <td>Staging Zones</td><td> <p>Click . The Item Pick Staging Zones window displays. Select a zone and click OK.</p> <p>Click  to create a zone. For more information about creating a zone, see <a href="#">Section 3.5.1, "Creating a Zone"</a> on page 47.</p> <p><b>Note:</b> The locations in the staging zone should be of "Regular" location type to ensure that the dynamic slotting of locations is accurately accomplished.</p> </td></tr> <tr> <td>Pick from these zones using task type</td><td>Select the order pick task type for the tasks you want to perform to move items from the staging location. For more information about the task type wizard, see <a href="#">Section 12.3, "Defining Task Types"</a> on page 887.</td></tr> </table>	Staging Zones	<p>Click . The Item Pick Staging Zones window displays. Select a zone and click OK.</p> <p>Click  to create a zone. For more information about creating a zone, see <a href="#">Section 3.5.1, "Creating a Zone"</a> on page 47.</p> <p><b>Note:</b> The locations in the staging zone should be of "Regular" location type to ensure that the dynamic slotting of locations is accurately accomplished.</p>	Pick from these zones using task type	Select the order pick task type for the tasks you want to perform to move items from the staging location. For more information about the task type wizard, see <a href="#">Section 12.3, "Defining Task Types"</a> on page 887.
Staging Zones	<p>Click . The Item Pick Staging Zones window displays. Select a zone and click OK.</p> <p>Click  to create a zone. For more information about creating a zone, see <a href="#">Section 3.5.1, "Creating a Zone"</a> on page 47.</p> <p><b>Note:</b> The locations in the staging zone should be of "Regular" location type to ensure that the dynamic slotting of locations is accurately accomplished.</p>				
Pick from these zones using task type	Select the order pick task type for the tasks you want to perform to move items from the staging location. For more information about the task type wizard, see <a href="#">Section 12.3, "Defining Task Types"</a> on page 887.				

### 7.2.1.1.2 Specifying Item Pick Location Configuration

*Pick Location Assignment* (PLA) assigns the warehouse locations to the demand placed. You can define the list of zones to use for picking by specifying for a combination of item level attributes, such as classifications and unit on measure. Multiple PLA rules may be specified to ensure that the zone level constraints are unique to the item classification and unit of measure combination. For example, for SKUs stocked in pallets, cases and loose units, it is advisable to have 3 distinct rules to cover zones that are applicable for each unit of measure. The locations to be used in the zone can be filtered further by considering the least travel or pick-to-clean constraints.



You can use the Item Pick PLA Configuration tab for:

- [Configuring Pick Location Rules for All Items](#)
- [Configuring Pick Location Rules for Specific Items](#)

### Assigning Pick Location Rules for All Items


You can define global PLA rules for all items in a warehouse based on unit of measure.


To assign pick location rules for all items:


1. From the Item Picking tab in the Shipment Group Details window, choose the Item Pick PLA Configuration tab.
2. From the Pick Location tree, select All Items.
3. Choose . The UOM Condition pop-up window displays.
4. Enter information in the applicable fields. Refer to [Table 7–13](#) for field value descriptions.
5. Choose .


**UOM Condition**

Description



When unit of measure is in 

Then, first search for pick locations as per PLA rule 



When inventory is not found, search as per PLA rule 

When inventory is still not found, search as per PLA rule 

**Table 7–8 UOM Condition Pop-Up Window**

Field	Description
Description	Enter a brief description of the unit of measure condition.
When Unit of Measure is in	<p>You must specify the units of measure for which this condition is based. The system uses the pick location parameters that you specify to generate pick plans for items of the units of measure you select.</p> <p>Choose . The List of Values pop-up window displays. Select the blank line and choose a unit of measure from the drop-down list menu. When you have finished adding units of measure, choose OK.</p>
Then, first search for pick locations as per PLA rule	<p>You must specify the pick location parameters to be used initially according to the pick location assignment rule.</p> <p>Choose . The Pick Location Assignment pop-up window displays. See <a href="#">Pick Location Assignment Rule (Item Pick) Pop-Up Window</a> for field level descriptions.</p> <p>When you have finished defining pick location parameters, choose OK.</p>

**Table 7–8 UOM Condition Pop-Up Window**

Field	Description
When inventory is not found, search as per PLA rule	<p>You can define pick location parameters to be used if inventory is not found using the initial parameters according to the pick location assignment rule.</p> <p>Choose . The Pick Location Assignment pop-up window displays. See <a href="#">Pick Location Assignment Rule (Item Pick) Pop-Up Window</a> for field value descriptions.</p> <p>When you have finished defining pick location parameters, choose OK.</p>
When inventory is still not found, search as per PLA rule	<p>You can define pick location parameters to be used if inventory is not found using the second set of parameters according to the pick location assignment rule.</p> <p>Choose . The Pick Location Assignment pop-up window displays. See <a href="#">Pick Location Assignment Rule (Item Pick) Pop-Up Window</a> for field value descriptions.</p> <p>When you have finished defining pick location parameters, choose OK.</p>

### Pick Location Assignment Rule (Item Pick) Pop-Up Window



The Pick Location Assignment pop-up window is used to set the parameters used to determine the location from which items are picked. Refer to [Table 7–9](#) for field value descriptions.




**Pick Location Assignment Rule**

Description



**Location Selection**

1. Locations with Inventory      Select locations having inventory from the following zones  
   
and having inventory in one of the following status  
   
Optimize retrieval by    ☒ Pick to clean    ☐ Least number of trips

2. Dedicated Locations      ☐ For the remaining demand, select dedicated location(s) from the zones listed above.


3. Cross Dock Locations      For the demand left over from the previous steps, explore cross-docking opportunity.  
Search for inbound shipments that are in following status  


**Task Creation**


Item Picking Task Type   

OK Cancel



**Table 7–9 Item Pick Location Assignment Window**

Field	Description
Description	Enter a brief description of the pick location assignment parameters.
Location Selection	
Locations with Inventory	When this pick location assignment is used, the system initially tries to find the optimal location to pick inventory based on the parameters you define below.
Select locations having inventory from the following zones	<p>You must specify the zones that you want to pick from when this pick location assignment is used.</p> <p>Choose . The List of Values pop-up window displays. Select the blank line and choose a zone from the drop-down list menu. When you have finished adding zones, choose OK.</p>

**Table 7–9 Item Pick Location Assignment Window**

Field	Description
and having inventory in one of the following status	<p>Specify the inventory status that you want to pick from when this pick location assignment is used.</p> <p>Choose . The Inventory Status List pop-up window displays. Select the blank line and choose a zone from the drop-down list menu. When you have finished adding zones, choose OK.</p>
Optimize retrieval by	<p>Choose Pick to Clean if you want the pick location assignment to locate a source for inventory and pick from it until there is no inventory available at that location.</p> <p>Choose Least number of trips if you want to optimize the pick location assignment on making the least amount of trips while picking inventory.</p>
Dedicated Locations	<p>If there is still pick demand after the Locations with Inventory algorithm has been performed, the system looks for locations dedicated specifically for the inventory.</p>
For the remaining demand, select dedicated location(s) from the zones listed above.	<p>Select this field if you want any pick demand that was not fulfilled using the above parameters to be picked from dedicated locations in the zones you have specified for Locations with Inventory. By selecting this field the system uses replenishment to ensure that the dedicated location remains stocked with pickable inventory.</p>
Cross Dock Locations	<p>For any remaining pick demand, you can define the inbound shipment status levels from which items can be cross-docked. Cross-docking allows you to retrieve inventory directly from receiving staging locations and bring the inventory to a dynamically slotted location for picking.</p>

**Table 7–9 Item Pick Location Assignment Window**

Field	Description
For the demand left over from the previous steps, explore cross-docking opportunity. Search for inbound shipments that are in following status	<p>You can specify the inbound shipment statuses that you want to search for inventory. The system searches for inbound shipments in the specified statuses. Once the shipment is received the system diverts the inventory to the dynamically slotted location.</p> <p>Choose . The Shipment Statuses pop-up window displays. Select the blank line and choose an inbound shipment status from the drop-down list menu. When you have finished adding inbound shipment statuses, choose OK.</p>
Task Creation	
Item Picking Task Type	<p>Select a type of task to use for item picking from the zones specified for this pick location assignment.</p> <p>Choose . The Task Type Wizard window displays. For more information about the task type wizard, see <a href="#">Section 12.3, "Defining Task Types"</a> on page 887.</p>

### Configuring Pick Location Rules for Specific Items


You can define PLA rules for items in a warehouse based on the item classification and unit of measure.

---

**Note:** Only Item Classifications corresponding to the Classification Purpose "retrieval" can be configured here.

---

To assign pick location for specific items:

1. From the Item Picking tab in the Shipment Group Details window, choose the Item Pick PLA Configuration tab.
2. From the Pick Location tree, select Specific Items.
3. Choose . The Item Condition pop-up window displays.

The screenshot shows the 'Yantra 7x Configurator' window with the 'Item Condition' tab selected. The dialog contains the following fields:

- Description:** A text box containing 'IC1'.
- Sequence #:** A text box containing '1'.
- Enterprise Code:** A dropdown menu with 'DEFAULT' selected.
- Item Classification:** A section containing three rows, each with a text box and a help icon:
  - Harmonized Code:** An empty text box.
  - UNSPSC:** An empty text box.
  - NMFC Code:** An empty text box.

4. In Description, enter a brief description of the item condition.
5. In Sequence #, enter the sequence number. Items are evaluated for the criteria you define. The sequence number determines the order by which item conditions evaluate items. Once an item matches up with a item condition's criteria, it uses the applicable pick location assignment algorithms.



**Note:** When an item is being requested for performing PLA, the item conditions are evaluated in a sequence. Once any of the conditions is evaluated as 'true', no more conditions are further evaluated. The evaluated condition is used for performing PLA.

6. From Enterprise Code, select the Enterprise you want to associate with the item condition.
7. In Item Classification, enter the applicable classification parameters according to your business practices. Fields used in Classifications are mapped to the Enterprise that you select for the item condition. For more information about configuring classifications, see the *Yantra 7x Product Management Configuration Guide*.

**Note:** To successfully release a wave, it is mandatory to specify both Item Pick Rules and Item Pick PLA Configuration.

7.2.1.1.3 Specifying Order Pick Rules

To specify order pick parameters:

- 1. From the Pick Strategy tab in the Shipment Group Details window, in the Pick Process Determination panel, choose Otherwise, use order picking when order pick conditions are met.
- 2. From the Order Pick Rules tab, choose . The Order Picking Condition pop-up window displays.
- 3. Enter information in the applicable fields. Refer to [Table 7–10](#) for field value descriptions.
- 4. Choose .

Order Picking Condition

Description

Enterprise Code

When all of the following conditions are met

Unit of Measure

Shipment Mode

Then, use Order Picking.

Table 7–10 Order Picking Condition Pop-Up Window

Field	Description
Description	Enter a brief description of the order picking condition.
Enterprise Code	Select the Enterprise you want to associate with the order picking condition.
When all of the following conditions are met	

**Table 7–10 Order Picking Condition Pop-Up Window**

Field	Description
Unit of Measure	Select an applicable unit of measure. If this unit of measure is met along with the other conditions, you can perform order picking.
Shipment Mode	Select an applicable shipment mode. If this shipment mode is met along with the other conditions, you can perform order picking.

#### 7.2.1.1.4 Specifying Order Pick Location Configuration

*Pick Location Assignment* (PLA) assigns the warehouse locations to the demand placed. You can define the list of zones to use for picking by specifying for a combination of item level attributes, such as classifications and unit of measure. Multiple PLA rules may be specified to ensure that the zone level constraints are unique to the item classification and unit of measure combination. For example, for SKUs stocked in pallets, cases and loose units, it is advisable to have 3 distinct rules to cover zones that are applicable for each unit of measure. The locations to be used in the zone can be filtered further by considering the least travel or pick-to-clean constraints.


You can use the Order Pick PLA Configuration tab for:

- [Configuring Pick Location Rules for All Items](#)
- [Configuring Pick Location Rules for Specific Items](#)

#### Configuring Pick Location Rules for All Items



You can define global PLA rules for all items in a warehouse based on unit of measure.

To assign pick location rules for all items:



1. From the Batch Picking tab in the Shipment Group Details window, choose the Batch Pick PLA Configuration tab.
2. From the Pick Location tree, select All Items.
3. Choose . The UOM Condition pop-up window displays.
4. Enter information in the applicable fields. Refer to [Table 7–11](#) for field value descriptions.

5. Choose .

**Table 7–11 UOM Condition Pop-Up Window**

Field	Description
Description	Enter a brief description of the unit of measure condition.
When Unit of Measure is in	<p>You must specify the units of measure for which this condition is based. The system uses the pick location parameters that you specify to generate pick plans for items of the units of measure you select.</p> <p>Choose . The List of Values pop-up window displays. Select the blank line and choose a unit of measure from the drop-down list menu. When you have finished adding units of measure, choose OK.</p>
Then, first search for pick locations as per PLA rule	<p>You must specify the pick location parameters to be used initially according to the pick location assignment rule.</p> <p>Choose . The Pick Location Assignment pop-up window displays. See <a href="#">Pick Location Assignment Rule (Order Pick) Pop-Up Window</a> for field value descriptions.</p> <p>When you have finished defining pick location parameters, choose OK.</p>

**Table 7–11 UOM Condition Pop-Up Window**

Field	Description
When inventory is not found, search as per PLA rule	<p>You can define pick location parameters to be used if inventory is not found using the initial parameters according to the pick location assignment rule.</p> <p>Choose . The Pick Location Assignment pop-up window displays. See <a href="#">Pick Location Assignment Rule (Order Pick) Pop-Up Window</a> for field value descriptions.</p> <p>When you have finished defining pick location parameters, choose OK.</p>
When inventory is still not found, search as per PLA rule	<p>You can define pick location parameters to be used if inventory is not found using the second set of parameters according to the pick location assignment rule.</p> <p>Choose . The Pick Location Assignment pop-up window displays. See <a href="#">Pick Location Assignment Rule (Order Pick) Pop-Up Window</a> for field value descriptions.</p> <p>When you have finished defining pick location parameters, choose OK.</p>

**Note:** To successfully release a wave, it is mandatory to specify both Order Pick Rules and Order Pick PLA Configuration.

### Pick Location Assignment Rule (Order Pick) Pop-Up Window



The Pick Location Assignment pop-up window is used to set the parameters used to determine the location from which items are picked. Refer to [Table 7–12](#) for field value descriptions.




**Pick Location Assignment Rule**



Description

**Location Selection**


1. Locations with Inventory Select locations having inventory from the following zones  
   
 and having inventory in one of the following status  
   
 Optimize retrieval by ☒ Pick to clean ☐ Least number of trips

2. Dedicated Locations ☐ For the remaining demand, select dedicated location(s) from the zones listed above.  
☐ For items without dedicated locations dynamically slot a location from the zones listed above.

3. Pick Fence Locations Whenever a dedicated location has demand that exceeds  times location capacity  
 Dynamically slot a location from the following zones instead  


4. Cross Dock Locations For the demand left over from the previous steps, explore cross-docking opportunity.  
 Search for inbound shipments that are in following status  
   
 Retrieve to a dynamically slotted location in following zones  


**Task Creation**



Order Picking Task Type  

OK Cancel

**Table 7–12 Order Pick Location Assignment Window**

Field	Description
Description	Enter a brief description of the pick location assignment parameters.
Location Selection	
Locations with Inventory	When this pick location assignment is used, the system initially tries to find the optimal location to pick inventory based on the parameters you define below.

**Table 7–12 Order Pick Location Assignment Window**

Field	Description
Select locations having inventory from the following zones	<p>You must specify the zones that you want to pick from when this pick location assignment is used.</p> <p>Choose . The List of Values pop-up window displays. Select the blank line and choose a zone from the drop-down list menu. When you have finished adding zones, choose OK.</p>
and having inventory in one of the following status	<p>Specify the inventory status that you want to pick from when this pick location assignment is used.</p> <p>Choose . The Inventory Status List pop-up window displays. Select the blank line and choose a zone from the drop-down list menu. When you have finished adding zones, choose OK.</p>
Optimize retrieval by	<p>Choose Pick to Clean if you want the pick location assignment to locate a source for inventory and pick from it until there is no inventory available at that location.</p> <p>Choose Least number of trips if you want to optimize the pick location assignment on making the least amount of trips while picking inventory.</p>
Dedicated Locations	<p>If there is still pick demand after the Locations with Inventory algorithm has been performed, the system looks for locations dedicated specifically for the inventory.</p>
For the remaining demand, select dedicated locations from the zones listed above.	<p>Select this field if you want any pick demand that was not fulfilled using the above parameters to be picked from dedicated locations in the zones you have specified for Locations with Inventory. By selecting this field the system uses replenishment to ensure that the dedicated location remains stocked with pickable inventory.</p>
For items without dedicated locations, dynamically slot a location from the zones listed above.	<p>Select this field if you want items that do not have a dedicated picking location to be dynamically slotted for picking. The location is dynamically slotted in the zones you have specified for Locations with Inventory.</p>

**Table 7–12 Order Pick Location Assignment Window**





Field	Description
Pick Fence Locations	When demand for inventory at a dedicated location exceeds its normal levels, you can specify the zones in which that inventory can be dynamically slotted for picking.
Whenever a dedicated location has demand that is $n$ times location capacity	Enter the multiple by which demand must exceed a dedicated location's capacity before a location is dynamically slotted for picking.  For example, you enter 5. A dedicated location has a capacity of 10 cases. A location is dynamically slotted for picking if there is a demand for 50 cases or more.
Dynamically slot a location from the following zones instead	You can specify the zones in which the system assigns dynamically slotted locations if demand exceeds the specified level.  Choose  . The List of Values pop-up window displays. Select the blank line and choose a zone from the drop-down list menu. When you have finished adding zones, choose OK.
Cross Dock Locations	For any remaining pick demand, you can define the inbound shipment status levels from which items can be cross-docked. Cross-docking allows you to retrieve inventory directly from receiving staging locations and bring the inventory to a dynamically slotted location for picking.
Search for inbound shipments that are in following status	You can specify the inbound shipment statuses that you want to search for inventory. The system searches for inbound shipments in the specified statuses. Once the shipment is received the system diverts the inventory to the dynamically slotted location.  Choose  . The Shipment Statuses pop-up window displays. Select the blank line and choose an inbound shipment status from the drop-down list menu. When you have finished adding inbound shipment statuses, choose OK.

Table 7–12 Order Pick Location Assignment Window

Field	Description
Retrieve to a dynamically slotted location in following zones	<p>You can specify the zones in which the system assigns dynamically slotted locations to which inventory is brought from the receiving dock for picking.</p> <p>Choose . The Cross Dock Zones pop-up window displays. Select the blank line and choose a zone from the drop-down list menu. When you have finished adding zones, choose OK.</p>
Task Creation	
Order Picking Task Type	<p>Select the type of task to use for order picking from the zones specified for this pick location assignment.</p> <p>Choose . The Task Type Wizard window displays. For more information about the task type wizard, see <a href="#">Section 12.3, "Defining Task Types"</a> on page 887.</p>

**Important:** During order pick, if you want to pick inventory for all configured UOMs into the same container for a shipment, choose a task type that picks inventory directly into the container.

**Note:** For Dedicated Locations, move request and replenish task will be created. For Cross Dock Locations, move request and replenish task are NOT created, instead the Wave Release will create "Activity Demand".

7.2.1.1.5 Specifying Batch Pick Rules

There is no configuration with regard to setting up of rules for Batch Picking.

Batch Picking is used when there are no matches to the Item Pick and Order Pick rules, and when in the Pick Process Determination panel, the Otherwise, use batch picking checkbox is selected.

#### 7.2.1.1.6 Specifying Batch Pick Location Configuration

*Pick Location Assignment* (PLA) assigns the warehouse locations to the demand placed. You can define the list of zones to use for picking by specifying for a combination of item level attributes, such as classifications and unit of measure. Multiple PLA rules may be specified to ensure that the zone level constraints are unique to the item classification and unit of measure combination. For example, for SKUs stocked in pallets, cases and loose units, it is advisable to have 3 distinct rules to cover zones that are applicable for each unit of measure. The locations to be used in the zone can be filtered further by considering the least travel or pick-to-clean constraints.



You can use the Batch Pick PLA Configuration tab for:

- [Configuring Pick Location Rules for All Items](#)
- [Configuring Pick Location Rules for Specific Items](#)



#### Configuring Pick Location Rules for All Items

You can define global PLA rules for all items in a warehouse based on unit of measure.



To assign pick location rules for all items:

1. From the Batch Picking tab in the Shipment Group Details window, choose the Batch Pick PLA Configuration tab.
2. From the Pick Location tree, select All Items.
3. Choose . The UOM Condition pop-up window displays.
4. Enter information in the applicable fields. Refer to [Table 7–13](#) for field value descriptions.
5. Choose .

**Table 7–13 UOM Condition Pop-Up Window**

Field	Description
Description	Enter a brief description of the unit of measure condition.
When Unit of Measure is in	<p>You must specify the units of measure for which this condition is based. The system uses the pick location parameters that you specify to generate pick plans for items of the units of measure you select.</p> <p>Choose . The List of Values pop-up window displays. Select the blank line and choose a unit of measure from the drop-down list menu. When you have finished adding units of measure, choose OK.</p>
Then, first search for pick locations as per PLA rule	<p>You must specify the pick location parameters to be used initially according to the pick location assignment rule.</p> <p>Choose . The Pick Location Assignment pop-up window displays. See <a href="#">The Pick Location Assignment Rule (Batch Pick) Pop-Up Window</a> for field level descriptions.</p> <p>When you have finished defining pick location parameters, choose OK.</p>

**Table 7–13 UOM Condition Pop-Up Window**

Field	Description
When inventory is not found, search as per PLA rule	<p>You can define pick location parameters to be used if inventory is not found using the initial parameters according to the pick location assignment rule.</p> <p>Choose . The Pick Location Assignment pop-up window displays. See <a href="#">The Pick Location Assignment Rule (Batch Pick) Pop-Up Window</a> for field level descriptions.</p> <p>When you have finished defining pick location parameters, choose OK.</p>
When inventory is still not found, search as per PLA rule	<p>You can define pick location parameters to be used if inventory is not found using the second set of parameters according to the pick location assignment rule.</p> <p>Choose . The Pick Location Assignment pop-up window displays. See <a href="#">The Pick Location Assignment Rule (Batch Pick) Pop-Up Window</a> for field level descriptions.</p> <p>When you have finished defining pick location parameters, choose OK.</p>

**The Pick Location Assignment Rule (Batch Pick) Pop-Up Window**

The Pick Location Assignment pop-up window is used to set the parameters used to determine the location from which items are picked. Refer to [Table 7–14](#) for field value descriptions.

Pick Location Assignment Rule

Description

Location Selection

1. Locations with Inventory

Select locations having inventory from the following zones  
  
and having inventory in one of the following status  
  
Optimize retrieval by ☒ Pick to clean ☐ Least number of trips

2. Dedicated Locations

☐ For the remaining demand, select dedicated location(s) from the zones listed above.  
☐ For items without dedicated locations dynamically slot a location from the zones listed above.

3. Pick Fence Locations

Whenever a dedicated location has demand that exceeds  times location capacity  
Dynamically slot a location from the following zones instead

4. Cross Dock Locations

For the demand left over from the previous steps, explore cross-docking opportunity.  
Search for inbound shipments that are in following status  
  
Retrieve to a dynamically slotted location in following zones

Task Creation

Batch Picking Task Type

OK

Cancel



Table 7–14 Batch Pick Location Assignment Window

Field	Description
Description	Enter a brief description of the pick location assignment parameters.
Location Selection	
Locations with Inventory	When this pick location assignment is used, the system initially tries to find the optimal location to pick inventory based on the parameters you define below.



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**Table 7–14 Batch Pick Location Assignment Window**

Field	Description
Select locations having inventory from the following zones	<p>You must specify the zones that you want to pick from when this pick location assignment is used.</p> <p>Choose . The List of Values pop-up window displays. Select the blank line and choose a zone from the drop-down list menu. When you have finished adding zones, choose OK.</p>
and having inventory in one of the following status	<p>Specify the inventory status that you want to pick from when this pick location assignment is used.</p> <p>Choose . The Inventory Status List pop-up window displays. Select the blank line and choose a zone from the drop-down list menu. When you have finished adding zones, choose OK.</p>
Optimize retrieval by	<p>Choose Pick to Clean if you want the pick location assignment to locate a source for inventory and pick from it until there is no inventory available at that location.</p> <p>Choose Least number of trips if you want to optimize the pick location assignment on making the least amount of trips while picking inventory.</p>
Dedicated Locations	If there is still pick demand after the Locations with Inventory algorithm has been performed, the system looks for locations dedicated specifically for the inventory.
For the remaining demand, select dedicated locations from the zones listed above.	Select this field if you want any pick demand that was not fulfilled using the above parameters to be picked from dedicated locations in the zones you have specified for Locations with Inventory. By selecting this field the system uses replenishment to ensure that the dedicated location remains stocked with pickable inventory.
For items without dedicated locations, dynamically slot a location from the zones listed above.	Select this field if you want items that do not have a dedicated picking location to be dynamically slotted for picking. The location is dynamically slotted in the zones you have specified for Locations with Inventory.

**Table 7–14 Batch Pick Location Assignment Window**

Field	Description
Pick Fence Locations	When demand for inventory at a dedicated location exceeds its normal levels, you can specify the zones in which that inventory can be dynamically slotted for picking.
Whenever a dedicated location has demand that is $n$ times location capacity	<p>Enter the multiple by which demand must exceed a dedicated location's capacity before a location is dynamically slotted for picking.</p> <p>For example, you enter 5. A dedicated location has a capacity of 10 cases. A location is dynamically slotted for picking if there is a demand for 50 cases or more.</p>
Dynamically slot a location from the following zones instead	<p>You can specify the zones in which the system assigns dynamically slotted locations if demand exceeds the specified level.</p> <p>Choose . The List of Values pop-up window displays. Select the blank line and choose a zone from the drop-down list menu. When you have finished adding zones, choose OK.</p>
Cross Dock Locations	For any remaining pick demand, you can define the inbound shipment status levels from which items can be cross-docked. Cross-docking allows you to retrieve inventory directly from receiving staging locations and bring the inventory to a dynamically slotted location for picking.
Search for inbound shipments that are in following status	<p>You can specify the inbound shipment statuses that you want to search for inventory. The system searches for inbound shipments in the specified statuses. Once the shipment is received the system diverts the inventory to the dynamically slotted location.</p> <p>Choose . The Shipment Statuses pop-up window displays. Select the blank line and choose an inbound shipment status from the drop-down list menu. When you have finished adding inbound shipment statuses, choose OK.</p>

**Table 7–14 Batch Pick Location Assignment Window**

Field	Description
Retrieve to a dynamically slotted location in following zones	<p>You can specify the zones in which the system assigns dynamically slotted locations to which inventory is brought from the receiving dock for picking.</p> <p>Choose . The Cross Dock Zones pop-up window displays. Select the blank line and choose a zone from the drop-down list menu. When you have finished adding zones, choose OK.</p>
Task Creation	
Batch Picking Task Type	<p>Select the type of task to use for batch picking from the zones specified for this pick location assignment.</p> <p>Choose . The Task Type Wizard window displays. For more information about the task type wizard, see <a href="#">Section 12.3, "Defining Task Types"</a> on page 887.</p>

**Note:** For Dedicated Locations, move request and replenish task will be created. For Cross Dock Locations, move request and replenish task are NOT created, instead the Wave Release will create "Activity Demand".


### 7.2.1.2 Defining a Shipment Group's Sort Strategy

You can define how waves belonging to this shipment group are sorted. You can configure logic for machine sorters by carrier, and by shipment.

To define a shipment group's sort strategy:

1. In the Shipment Group Details window, choose the Sort For Shipping tab.
2. Choose 'Use the same Sort Strategy as defined in Shipment Group' and select the applicable shipment group if you want to use a sort strategy already defined for an existing shipment group.

**Important:** If you choose to use another shipment group's sort strategy, any modifications you make to the sort strategy in the original shipment group has a direct impact on the sort strategy of all shipment groups inheriting from it.

3. Choose 'Define a separate Sort Strategy for this Shipment Group' if you want to define a new sort strategy for this shipment group. The Carrier Sorting and Shipment Sorting tabs appear.
4. Choose .



You can use the Sort For Shipping Tab for:

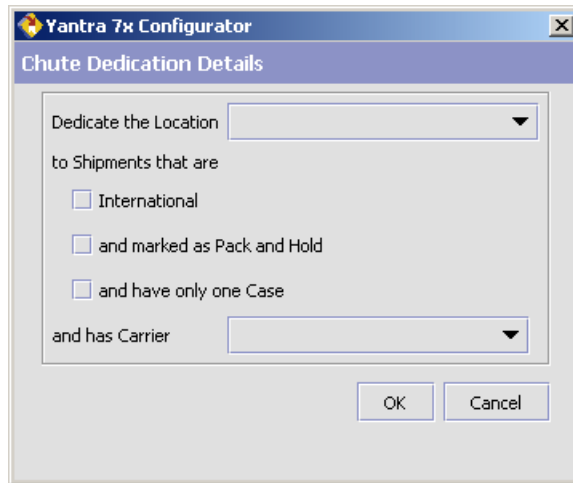
- [Defining Carrier Sorting Parameters](#)
- [Defining Shipment Sorting Parameters](#)

### 7.2.1.2.1 Defining Carrier Sorting Parameters

If you selected 'Define a separate Sort Strategy for this Shipment Group', you can define carrier sorting parameters.

To define carrier sorting parameters:

1. From the Sort For Shipping tab in the Shipment Group Details window, choose the Carrier Sorting tab.
2. Select 'First, sort by Carrier' if applicable.
3. From Equipment Type, select the equipment type the machine sorter you are defining parameters for belongs to.
4. From Equipment, select the machine sorter you want to define parameters for. The Chute Dedication table appears.
5. From the Chute Dedication table, choose . The Chute Dedication Details pop-up window displays.
6. Enter information in the applicable fields. Refer to [Table 7–15](#) for field value descriptions.
7. Choose .




**Table 7–15 Chute Dedication Details Pop-Up Window**

Field	Description
Dedicate the Location	Select the location that you want the machine to sort shipments that meet the criteria you define in the following fields.
<b>to Shipments that are</b>	
International	Select this field if you want to sort export shipments to the selected international location.
and marked as Pack and Hold	Select this if you want to sort shipments marked as Pack and Hold to the selected location.
and have only one Case	Select this field if you want to sort single carton shipments to the selected location.
and has Carrier	Select the carrier you want to apply this sorting rule to. For example, if you want to sort all shipments being shipped by UPS to location 1 (L1) for loading.

#### 7.2.1.2.2 Defining Shipment Sorting Parameters

If you selected 'Define a separate Sort Strategy for this Shipment Group', you can define shipment sorting parameters.

To define shipment sorting parameters:

- 1. From the Sort For Shipping tab in the Shipment Group Details window, choose the Shipment Sorting tab.
- 2. Enter information in the applicable fields. Refer to [Table 7–16](#) for field value descriptions.
- 3. Choose .

Carrier Sorting

Shipment Sorting

☒ Then, sort by Shipment

Shipment Sorting Rules


Equipment Type

Equipment

Table 7–16 Shipment Sorting Tab

Field	Description
Then, sort by Shipment	Select this field if you want to define parameters for sorting by shipment. <b>Note:</b> Carrier sorting is performed before shipment sorting.
Shipment Sorting Rules	


**Table 7–16 Shipment Sorting Tab**

Field	Description
Equipment Type	If you chose Sort using Equipment, select the equipment type the machine sorter you are defining parameters for belongs to.
Equipment	<p>If you chose Sort using Equipment, select the machine sorter you want to define parameters for. The Chute Dedication table appears.</p> <p>To define new chute dedication parameters, choose  and refer to <a href="#">Table 7–15</a> for field value descriptions.</p>

### 7.2.1.3 Defining a Shipment Group's Advanced Parameters

You can define process model used for waves, the wave acceptance process, and the wave release process.

To define a shipment group's advanced parameters:

1. In the Shipment Group Details window, choose the Advanced tab.
2. Enter information in the applicable fields. Refer to [Table 7–17](#) for field value descriptions.
3. Choose .

Primary Info

Pick Strategy

Sort For Shipping

Advanced

Process Model

Wave Pipeline

Acceptance Process

☒ Automatically accept every wave

☐ Automatically accept only those waves that meet any of the following conditions

Total Volume

0

CIN

# Shipments

0

☐ All waves are manually accepted

Wave Release Process

# Waves released concurrently

0

Table 7–17 Advanced Tab

Field	Description
Process Model	
Wave Pipeline	Select the pipeline you want to use for processing waves belonging to this shipment group.
Acceptance Process	
Automatically accept every wave	Choose this field if you want waves to be accepted regardless of size and total number of shipments.
Automatically accept only those waves that meet any of the following conditions	Choose this field and enter the applicable parameters if you want to automatically accept waves that meet specified volume and/or shipment number constraints and manually accept waves that do not.



**Table 7–17 Advanced Tab**

Field	Description
All waves are manually accepted	Choose this field if you want all waves belonging to this shipment group to be manually accepted.
Wave Release Process	
# Waves released concurrently	Enter the maximum number of waves against this shipment group you want to be released to the warehouse at one time.

## 7.2.2 Defining Wave Size Constraints



You can define wave size constraints for waves. These constraints limit the size of a wave. A *wave* is an aggregation of picks across zones and orders that are consolidated to optimize pick and prioritize shipment.

You can use the Wave Constraints tab for:

- [Creating Wave Size Constraints](#)
- [Modifying Wave Size Constraints](#)
- [Deleting Wave Size Constraints](#)

### 7.2.2.1 Creating Wave Size Constraints

To create wave size constraints:

1. From the tree in the application rules side panel, choose Picking > Pick Planning. The Pick Planning window appears in the work area.
2. Choose the Wave Size Constraints tab. The Wave Size Constraints window displays.
3. Choose  from the Wave Size Constraints table. The Size Constraint Details pop-up window displays.
4. Enter information in the applicable fields. Refer to [Table 7–18](#) for field value descriptions.
5. Choose .

Yantra 7x Configurator

Size Constraint Details

Description

When shipment matches all the following conditions

Enterprise Code

Shipment Mode

Carrier

☐ Shipment has more than one shipment line

☐ Shipment has more than one case

☐ And for shipments that have any lines having the following attributes

Product Line

Then ensure that wave size does not exceed any of the following constraints

# Loads

# Shipments

# Cases

Volume

CIN

Table 7–18 Size Constraint Details Pop-Up Window

Field	Description
Description	Enter a brief description of the size constraint parameters.
When shipment matches all the following conditions	When shipments meet all of the conditions specified in the following fields, then the constraints indicated in the option you select below are applied.

**Table 7–18 Size Constraint Details Pop-Up Window**



Field	Description
Enterprise Code	Select the Enterprise that you want apply constraints to.
Shipment Mode	Select the shipment mode that you want to apply constraints to. For example, if parcel carriers cannot ship a certain amount of cases in a shipment, you can select Parcel and enter the case constraint below.
Carrier	Select the carrier that you want to apply constraints to. For example, if there is a specific carrier that will not ship more than a specified volume, you can select the carrier and enter the volume constraint below.
Shipment has more than one shipment line	Select this field if you want to apply the constraints only against shipments that have more than one line.
Shipment has more than one case	Select this field if you want to apply the constraints only against shipments with more than one case.
And for shipments that have any lines having the following attributes	<p>Select this field if you want to use classifications to determine the wave constraint criteria.</p> <p>A field used in Classifications is mapped to the Enterprise that you select for the shipment selector. For more information about configuring classifications, see the <i>Yantra 7x Product Management Configuration Guide</i>.</p> <p>Enter the valid value for the classifications that are displayed according to your business practices.</p>
Then ensure that wave size does not exceed any of the following constraints	
# SKUs	<p>Enter the number of SKUs to limit in a wave if the above criteria is met.</p> <p><b>Note:</b> This field is only displayed if the 'And for shipments that have any lines having the following attributes' option is selected.</p>
# Loads	<p>Enter the number of loads to limit in a wave if the above criteria is met.</p> <p><b>Note:</b> This field is not displayed if the 'And for shipments that have any lines having the following attributes' option is selected.</p>

**Table 7–18 Size Constraint Details Pop-Up Window**

Field	Description
# Shipments	Enter the number of shipments to limit in a wave if the above criteria is met. <b>Note:</b> This field is not displayed if the 'And for shipments that have any lines having the following attributes' option is selected.
# Cases	Enter the number of cases to limit in a wave if the above criteria is met. <b>Note:</b> This field is not displayed if the 'And for shipments that have any lines having the following attributes' option is selected.
Volume	Enter the volume and select the applicable unit of measure to limit a wave to if the above criteria is met. <b>Note:</b> This field is not displayed if the 'And for shipments that have any lines having the following attributes' option is selected.

## 7.2.2.2 Modifying Wave Size Constraints


To modify wave size constraints:

1. From the tree in the application rules side panel, choose Picking > Pick Planning. The Pick Planning window appears in the work area.
2. Choose the Wave Size Constraints tab. The Wave Size Constraints window displays.
3. Locate the applicable wave size constraint and choose . The Size Constraint Details pop-up window displays.
4. Enter information in the applicable fields. Refer to [Table 7–18](#) for field value descriptions.
5. Choose .

## 7.2.2.3 Deleting Wave Size Constraints

To delete wave size constraints:

1. From the tree in the application rules side panel, choose Picking > Pick Planning. The Pick Planning window appears in the work area.

2. Choose the Wave Size Constraints tab. The Wave Size Constraints window displays.
3. Locate the applicable wave size constraint and choose .

### 7.2.3 Defining a Wave Release Schedule

You can define the schedule used to release waves for picking in the warehouse for a given day. You can define the different times and days that waves belonging to a shipment group are released.

For example, if you have a shipment group (S1) defined for a specific carrier that only picks up shipments at 3 PM on Thursdays and Fridays, you would not want the system to generate pick waves for shipments belonging to that group on Monday at 9 AM.

You might want the wave to be released earlier than 3 hours before the pickup time to allot for picking, packing, value-added services, and so on. Using the wave release schedule you can schedule waves for S1 to be released for picking only on Thursday and Friday at noon through 12:30. In this scenario, as the previous pick tasks for the day are completed during the timeframe you have scheduled for S1, the waves are released on Thursday and Friday between noon and 12:30.

However, if for some reason of the warehouse has fallen behind on pick tasks, and the S1 waves were not released between the specified timeframe, these shipments are stamped and added to the next scheduled wave release timeframe for S1. For example, the warehouse falls behind on its pick tasks on a Thursday morning. The previously released waves spill into the noon to 12:30 timeframe and the S1 waves do not get released. In this case, shipments in these unreleased waves are stamped and picked back up for wave release on Friday.

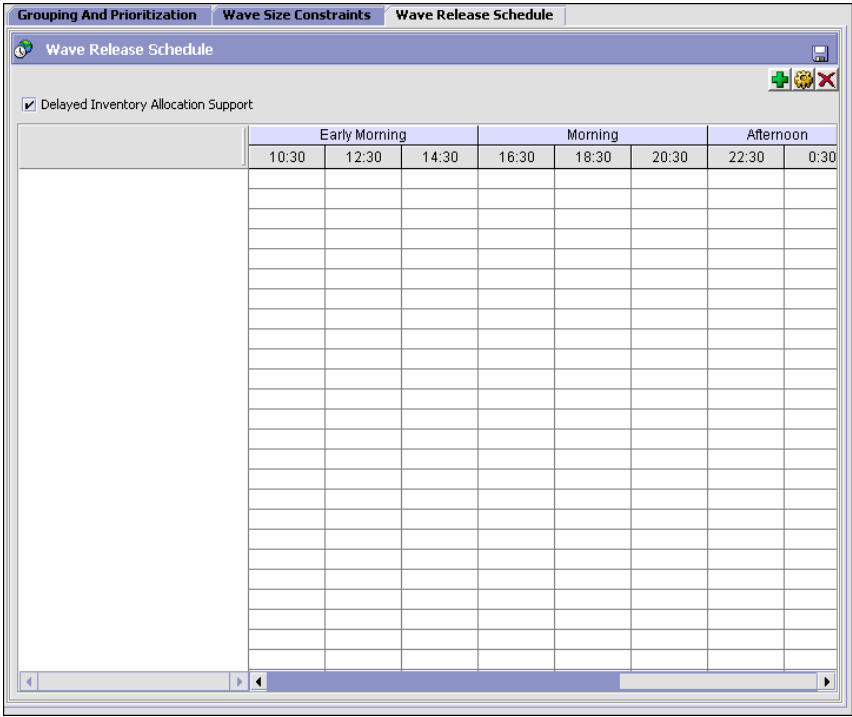
You can use the Wave Release Schedule tab for:


- [Creating a Wave Release Schedule](#)
- [Modifying a Wave Release Timeframe](#)
- [Deleting a Wave Release Timeframe](#)

#### 7.2.3.1 Creating a Wave Release Schedule



To create a wave release schedule for a shipment group:

- 1. From the tree in the application rules side panel, choose Picking > Pick Planning. The Pick Planning window appears in the work area.
  - 2. Choose the Wave Release Schedule tab. The Wave Release Schedule window displays. You can view wave release timeframe details.
  - 3. Check the Delayed Inventory Allocation Support box for the Allocate Task agent to allocate tasks in a multi-threaded fashion.
- For more information about allocating tasks, see [Section A.2.2, "Allocate Task"](#).



- 4. Choose . The Wave Release Schedule Details pop-up window appears.

The screenshot shows a dialog box titled "Yantra 7x Configurator" with a tab labeled "Wave Release Schedule Details". Inside the dialog, there is a "Shipment Group" drop-down menu. Below it are two text input fields for "Start Time" and "End Time". A "Select All" checkbox is located below the time fields. Further down, there are seven checkboxes for the days of the week: Sunday, Monday, Tuesday, Wednesday, Thursday, Friday, and Saturday. At the bottom right of the dialog are "OK" and "Cancel" buttons.

5. From the Shipment Group drop-down list menu, select the shipment group for which you want to create a wave release timeframe.
6. In Start Time, enter the start time for the wave release timeframe.
7. In End Time, enter the end time for the wave release timeframe.
8. Select the days for which the wave release timeframe are valid.
9. Choose . A graphical representation of the wave release timeframe appears in the wave timesheet for the shipment group, in the Wave Release Schedule window.
10. Continue to add wave release timeframes for the defined shipment groups.
11. When you have completed the wave release schedule, choose .

### Troubleshooting Tip:

#### Problem

Shipment is getting excluded from the wave.

#### Cause



Replenishment strategy does not have cross-dock location configured.

#### Resolution

If cross-dock location is selected along with dedicated or dynamically slotted locations in the PLA rule, then make sure that a similar cross-dock is configured in the replenishment strategy.

### 7.2.3.2 Modifying a Wave Release Timeframe

To modify a wave release timeframe from a shipment group:


1. From the tree in the application rules side panel, choose Picking > Pick Planning. The Pick Planning window appears in the work area.
2. Choose the Wave Release Schedule tab. The Wave Release Schedule window displays.
3. From the wave release timesheet, select the timeframe you want to modify.
4. Choose . The Wave Release Schedule Details pop-up window appears.
5. Make the changes, as necessary. Choose .

### 7.2.3.3 Deleting a Wave Release Timeframe

To delete a wave release timeframe from a shipment group:

1. From the tree in the application rules side panel, choose Picking > Pick Planning. The Pick Planning window appears in the work area.
2. Choose the Wave Release Schedule tab. The Wave Release Schedule window displays.



3. From the wave release timesheet, select the timeframe you want to delete.
4. Choose .

## 7.3 Defining Wave Cancellation Reasons


You can define wave cancellation reasons that can be specified when a user cancels a wave in the Application Consoles.

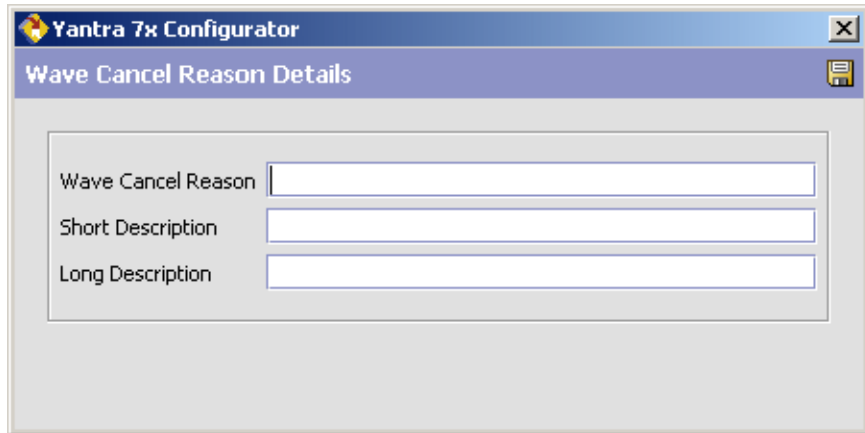
You can use the Wave Cancellation Reasons branch for:

- [Creating a Wave Cancellation Reason](#)
- [Modifying a Wave Cancellation Reason Code](#)
- [Deleting a Wave Cancellation Reason](#)


### 7.3.1 Creating a Wave Cancellation Reason

To create a wave cancellation reason:

1. From the tree in the application rules side panel, choose Picking > Wave Cancellation Reasons. The Wave Cancellation Reason window appears in the work area.
2. Choose . The Wave Cancellation Reasons pop-up window displays.





The screenshot shows a software window titled "Yantra 7x Configurator" with a sub-header "Wave Cancel Reason Details". Inside the window, there are three text input fields labeled "Wave Cancel Reason", "Short Description", and "Long Description". The window has standard OS controls (minimize, maximize, close) in the top right corner.

3. In Wave Cancel Reason, enter the name of the wave cancellation reason.
4. In Short Description, enter a brief description of the wave cancellation reason.
5. In Long Description, enter a more detailed description of the wave cancellation reason.
6. Choose .


### 7.3.2 Modifying a Wave Cancellation Reason Code

To modify a wave cancellation reason code:

1. From the tree in the application rules side panel, choose Picking > Wave Cancellation Reasons. The Wave Cancellation Reason window appears in the work area.
2. Select the applicable wave cancellation reason and choose . The Wave Cancellation Reasons pop-up window displays.
3. In Short Description, enter a brief description of the wave cancellation reason.
4. In Long Description, enter a more detailed description of the wave cancellation reason.
5. Choose .

### 7.3.3 Deleting a Wave Cancellation Reason

To delete a wave cancellation reason:

1. From the tree in the application rules side panel, choose Picking > Wave Cancellation Reasons. The Wave Cancellation Reason window appears in the work area.
2. Select the applicable wave cancellation reason and choose .

## 7.4 Defining Purge Criteria

Transactional data collected by Yantra 7x WMS during the execution are periodically removed from the 'live' transactional tables. It is common to retain order related information for extended periods of time. There are

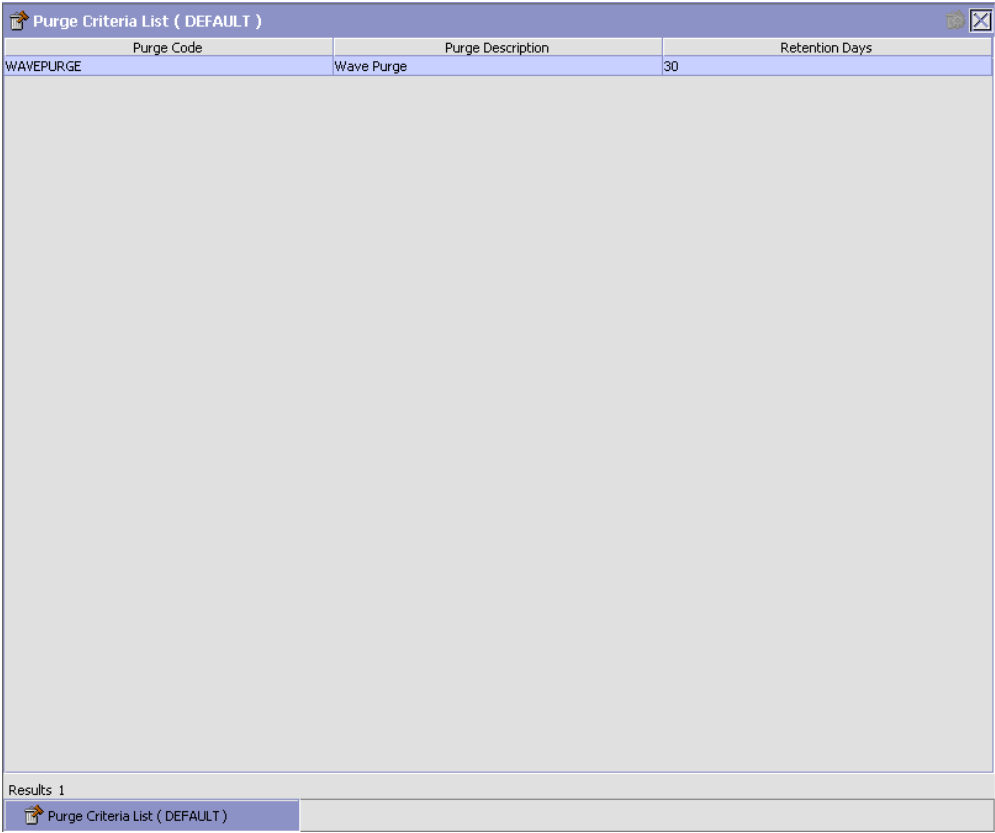
history tables provided for relevant transactional tables to move data from the day-to-day 'live' tables to a historical table.



Purge is the process by which old data is removed from the system database. A purge minimizes the number of unused database records to increase search efficiency and reduces the size of the required physical disk.

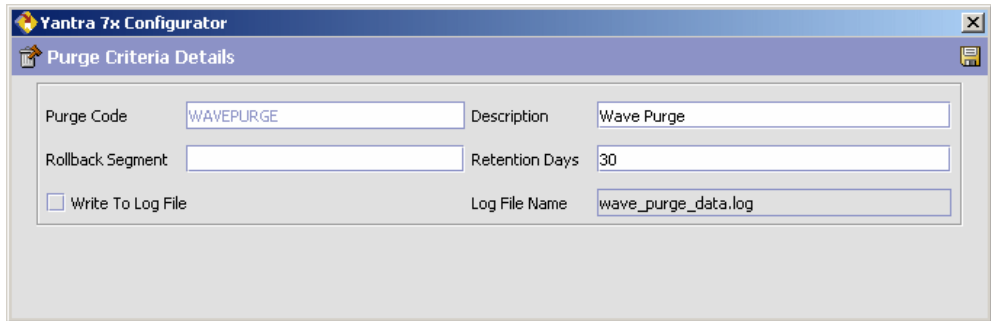
7.4.1 Setting Up Purge Criteria

To set up purge criteria:

- 1. From the tree in the application rules side panel, choose Picking > Purge Criteria. The Purge Criteria List window displays.



2. In the Purge Criteria List window, choose . The Purge Criteria Details pop-up window appears.
3. Enter information in the applicable fields. Refer [Table 7–19](#) for field value descriptions.
4. Choose .



**Table 7–19 Purge Criteria Details Pop-up Window**

Field	Description
Purge Code	Identifies a purge program. This is a system defined code.
Description	Description of the purge.
Rollback Segment	Defines the rollback segment that should be explicitly used for the purge transaction qualified by the purge code.  This is useful when there are huge logical data sets that have to be purged. This is optional and used for order related purges.
Retention Days	Enter the number of days of data to be retained in the database (going backwards from the time the program runs). Make sure that your table size takes into account the number of retention days entered here.

**Table 7–19 Purge Criteria Details Pop-up Window**

Field	Description
Write To Log File	Check this box if you want purged data written to a log. The log can be backed up and used as a journal at a later date.
Log File Name	<p>Enter a log file name. This is applicable only if 'Write To Log File' is checked. This file consists records of the specific table that is purged.</p> <p>The log file is created in the directory specified in the <code>yfs.purge.path</code> of <code>yfs.properties</code>. If a variable is introduced, then <code>yfs.purge.path</code> is ignored. For more information on using variables for the log file directory refer to <i>Yantra 7x Customization Guide</i>.</p> <p>For information about filename limitations related to internationalization, see the <i>Yantra 7x Localization Guide</i>.</p>



## Configuring Value Added Services

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The Value Added Services (VAS) area in the warehouse performs activities that include packaging, monogramming and ticketing. The retrieval rules are defined further in this section.

The different types of Value Added Service activities include:

- Monogramming on a T-shirt
- Building computer to buyer's specification
- Segregating individual boxes from larger boxes
- Scratch guarding a sofa
- Installing a PC at home

As the above examples suggest, Value Added Services related activities apply both before and after the shipping process.

**NOTE:** To be able to confirm a Work Order you should have an Inventory Status Transition Rule setup for the Zone that the VAS location belongs. This Inventory Status Transition Rule should be defined from Blank to an Inventory Status that is associated with an ONHAND Supply Type.

Use Value Added Services for:

- [Defining Activities](#)
- [Defining Retrieval Strategy](#)

- [Defining Putaway Preferences](#)
- [Defining Work Order Cancellation Reasons](#)
- [Defining Allocation Considerations](#)
- [Defining Value Added Services Modification Rules](#)
- [Defining Value Added Services Process Type Details](#)
- [Defining Value Added Services Process Model](#)
- [Defining Purge Criteria](#)

## 8.1 Defining Activities

Activities in the warehouse are grouped into Activity Groups. Yantra 7x WMS provides a pre-defined set of activity groups for a warehouse. Examples of activity groups include Receiving, VAS, Picking and Packing.

Each activity group is associated with activity codes that define each activity that is performed. For example, receiving activity group has pre-receiving, Packing and receiving activities.

The list here is specific to the VAS process.

**Note:** Activity Codes and Activity Constraints may be defined only when the WMS tree is loaded for Node / Hub combination.


Use Activities for:

- [Creating an Activity Code](#)
- [Modifying an Activity Code](#)
- [Deleting an Activity Code](#)
- [Setting Up Activity Constraints for Single SKU](#)
- [Setting Up Activity Constraints for Containers](#)

### 8.1.1 Creating an Activity Code

To create an activity code:



1. From the tree in the application rules side panel, choose VAS > Activities. The Activities window is displayed.
2. Enter information in the applicable fields. Refer [Table 8–1](#) for field value descriptions.
3. Choose .

**Activities ( DEFAULT )**

Activity Group

**Activity List**

Activity Code	Description
VAS	Value Added Service
UNPACK-COMPONENTS	Unpack Components
ASSEMBLE-COMPONENTS	Assemble Components
PACK-KIT	PACK KIT
UNSCREW-KIT	Unscrew Kit
SEPARATE-COMPONENTS	Separate Components
PACK-COMPONENTS	Pack Components
CHANGE-SEGMENT	Change Segment
PUT-LOGO-ON-COMPONENTS	Put logo on components
GIFT-PACK-HOME-THEATRE	Gift pack Home Theatre
CHECK-POWER-SUPPLY	Check power supply
MAKE-FUNCTIONAL-AND-DEMO	Make functional and demo
GET-COMPONENTS	GET-COMPONENTS
*	

Results 13 Of 13

**Activities ( DEFAULT )**


**Table 8–1 Activities Window**

Field	Description
Activity Group	This is automatically populated by the system as 'Value Added Services'.
<b>Activity List</b>	
Activity Code	Enter a name for the activity code. Activity code is the unique identity of the activity.
Description	Enter a brief description for the activity code.

### 8.1.2 Modifying an Activity Code

Once an activity code has been created, it can be modified.


To modify an activity code:

1. From the tree in the application rules side panel, choose VAS > Activities. The Activities window is displayed, with the list of activities.
2. Enter information in the applicable fields. Refer [Table 8–1](#) for field value descriptions.
3. Choose .

*It is recommended that the Yantra 7x WMS provided list of activity codes are not modified.*

### 8.1.3 Deleting an Activity Code

To delete an activity code:

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

*It is recommended that the Yantra 7x WMS provided list of activity codes are not deleted.*

## 8.2 Defining Activity Constraints

Activities in the warehouse are performed based on attributes of the shipment, container or inventory requiring VAS. The attributes considered are single SKU inventory, and containers.

When an Activity is performed on an Item (Pre-pick VAS, or VAS for stocking), you need to define the activity constraints in the Single SKU Tab. When the Activity is performed on a container (Post-pick VAS) you need to define it for the Container.

Use Activity Constraint set-up for:

- [Setting Up Activity Constraints for Single SKU](#)
- [Setting Up Activity Constraints for Containers](#)

### 8.2.1 Setting Up Activity Constraints for Single SKU


The constraints for the activity of a single SKU are specified here. This applies for all UOM of a SKU.

Use Activity Constraint set-up for:

- [Creating an Activity Constraint for Single SKU](#)
- [Creating a New Activity Constraint for Single SKU from an Existing Activity Constraint](#)
- [Modifying an Activity Constraint for Single SKU](#)
- [Deleting an Activity Constraint for Single SKU](#)

#### 8.2.1.1 Creating an Activity Constraint for Single SKU

To create an activity constraint for single SKU:

1. From the tree in the application rules side panel, choose VAS > Activities. The Activity Search window is displayed, with the list of activities.
2. Choose the Activity Code whose Activity Constraint is to be set up.
3. Choose . The Activity Constraints window is displayed.
4. In the Activity Constraints window, choose the Single-SKU tab. The Single-SKU tab window for Activity Constraints is displayed.

Activity Constraints ( DEFAULT / MA03 )

Activity Code Value Added Service

Single-SKU Container

Activity Constraints ( DEFAULT / MA03 )


Description	Specific To Activity Group	Product Class	Inventory Status	UOM
-------------	----------------------------	---------------	------------------	-----

Results 0 Of 0

Activity Search ( DEFAULT ) Activity Constraints ( DEFAULT / MA03 )

5. In the Single-SKU tab window, choose . The Activity Constraint Details window is displayed.
6. Enter information in the applicable fields. Refer [Table 8–2](#) for field value descriptions.
7. Choose .

**Activity Constraint Details ( DEFAULT / MA03 ) : Single-SKU**

Description  To View Strategy Click here 

Activity Code  Requesting Activity Group

Product Class  Inventory Status

Segment Type  Segment

UOM  Container Type

Item Classification


**Location Priorities**

Priority	Location
2	Bulk Loc
*	


Results 1 Of 1

Activity Search ( DEFAULT )    Activity Constraints ( DEFAULT / MA0...    Activity Constraint Details ( DEFAULT...

**Table 8–2 Activity Constraint Details - Single-SKU Tab Window**

Field	Description
Description	Enter a description for the activity constraint.
To View Strategy Click here	<p>Choose  to view or set up Putaway Strategy. For more details on setting up a putaway strategy see <a href="#">Setting Up Putaway Strategy for Single-SKUs</a>.</p> <p>Note: Putaway strategy may be specified for the putaway preferences after the preference is saved.</p>
Activity Code	This indicates the activity code for the constraint.

**Table 8–2 Activity Constraint Details - Single-SKU Tab Window**

Field	Description
Requesting Activity Group	Choose the requesting activity group. Typical values are Receipt, and Packing.
Product Class	Choose the product class for the constraint, if applicable.  Product class is the inventory classification of an item based on product's characteristics. Typical values are FQ - First Quality, SQ - Second Quality, etc.
Inventory Status	Choose the inventory status for the constraint, if applicable.  Inventory status refers to an inventory sub classification based on the results of the inventory control processes within the warehouse.
Segment Type	Enter the segment type for the constraint, if applicable.  This indicates an inventory category. Typical values are MTC – Made to Customer, and MTO - Made to Order.
Segment #	Enter the segment number for the constraint, if applicable.  A segment holds either the specific buyer or specific order number that requires dedication.
UOM	Choose the UOM for the constraint, if applicable. UOM points to the Unit of measure of the item.
Container Type	The container type associated with the UOM selected is displayed. Typical values are "Pallet" and "Case".
<b>Item Classification</b>	<b>List of putaway item classifications for the Enterprise are displayed. An example, Product Line is shown below.</b>
Product Line	Choose relevant product line item classification for the putaway activity.  Choose  . In the Classification window, select the applicable product line classification.
<b>Location Priorities</b>	


**Table 8–2 Activity Constraint Details - Single-SKU Tab Window**

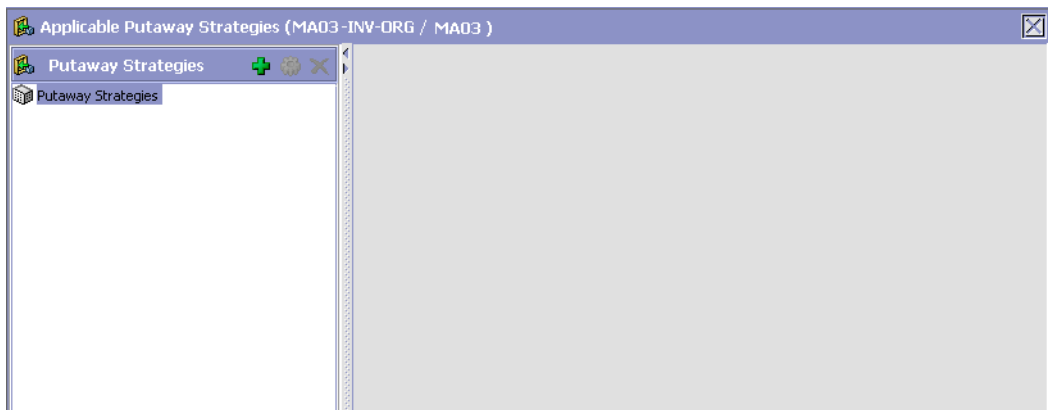
Field	Description
Priority	<p>Enter a number to represent the priority.</p> <p>The priority is used to sequence the order in which the location priorities are evaluated. For example, all storage code level priorities are to be evaluated first before generic priorities.</p> <p>The priority needs to be a positive integer, greater than zero. This is a mandatory field.</p>
Location	<p>Choose the relevant location for the activity.</p> <p>This is a mandatory field.</p>


### Setting Up Putaway Strategy for Single-SKUs


You can set up putaway strategies to putaway applicable inventory from a source zone to a target zone, based on the strategy specified.

To set up putaway strategy for single-SKUs:

1. In the Activity Constraint Details : Single SKU window, choose .
2. The Applicable Putaway Strategies window is displayed.



3. Choose  in the Putaway Strategies panel. The Putaway Strategy Details window appears in the right panel.
4. Enter information in the applicable fields. See the Putaway Strategy Details Window table for field value descriptions.

5. Choose .

Putaway Strategy Details

DescriptionStrategy for DVD-LockAndKey-EACHUOMCASE

Item Classification

Product LineDVD

StorageTypeLockAndKey

Product Line

System Directed Putaway Task Types

	Source Zone	Target Zone	Container Type	Task Type
*				

Results 0 Of 0




Ad Hoc Task Types

	Source Zone	Target Zone	Container Type	Task Type
*				

Results 0 Of 0



**Table 8–3 Putaway Strategy Details Window**

Field	Description
Description	Enter a description for the Putaway Strategy.
UOM	Select the UOM for the Putaway Strategy, if applicable. Note: The UOM will be defaulted in instances where it has been specified in the Putaway Preference Details screen.
<b>Item Classification</b>	List of putaway item classifications for the Enterprise are displayed. An example, Product Line is shown below.
Product Line	Choose relevant product line item classification for the putaway activity.  Choose  . In the Classification Values window, select the applicable product line classification.
<b>System Directed Putaway Task Types</b>	<b>Displays the list of existing system directed putaway task types.</b>  <b>You may use  to delete an existing system directed putaway task type.</b>
Source Zone	Select the source zone where inventory is available.
Target Zone	Select the target zone where you want to move the inventory.
Container Type	Select the container type to be used to move the inventory from the source zone to the target zone. Typical values are Case and Pallet.
Task Type	Select the Putaway Task Type applicable to this putaway strategy. This field displays the list of existing system directed task types that belong to the 'PUTAWAY' activity group.
<b>Ad hoc Task Types</b>	<b>Displays the list of existing ad hoc task types.</b>  <b>You may use  to delete an existing ad hoc task type.</b>
Source Zone	Select the source zone where inventory is available.
Target Zone	Select the target zone where you want to move the inventory.




**Table 8–3 Putaway Strategy Details Window**

Field	Description
Container Type	Select the container type to be used to move the inventory from the source zone to the target zone. Typical values are Case and Pallet.
Task Type	Select the Putaway Task Type applicable to this putaway strategy. This field displays the list of existing ad hoc task types that belong to the 'PUTAWAY' activity group.

6.




### 8.2.1.2 Creating a New Activity Constraint for Single SKU from an Existing Activity Constraint

To create a new activity constraint for single SKU from an existing activity constraint:

1. From the tree in the application rules side panel, choose VAS > Activities. The Activity Search window is displayed, with the list of activities.
2. Choose the Activity Code whose Activity Constraint is to be set up.
3. Choose . The Activity Constraints window is displayed.
4. In the Activity Constraints window, choose the Single-SKU tab. The Single-SKU tab window for Activity Constraints is displayed.
5. In the Single-SKU tab window, choose the activity constraint that is to be copied from.
6. Choose . The Activity Constraint Details window is displayed.
7. Enter information in the applicable fields. Refer [Table 8–2](#) for field value descriptions.
8. Choose .



### 8.2.1.3 Modifying an Activity Constraint for Single SKU

To modify an activity constraint for single SKU:

1. From the tree in the application rules side panel, choose VAS > Activities. The Activity Search window is displayed, with the list of activities.
2. Choose the Activity Code whose Activity Constraint is to be set up.
3. Choose . The Activity Constraints window is displayed.
4. In the Activity Constraints window, choose the Single-SKU tab. The Single-SKU tab window for Activity Constraints is displayed.
5. In the Single-SKU tab window, choose the activity constraint that is to be modified.
6. Choose . The Activity Constraint Details window is displayed.
7. Enter information in the applicable fields. Refer [Table 8–2](#) for field value descriptions.
8. Choose .

#### 8.2.1.4 Deleting an Activity Constraint for Single SKU

To delete an activity constraint for single SKU:

1. From the tree in the application rules side panel, choose VAS > Activities. The Activity Search window is displayed, with the list of activities.
2. Choose the Activity Code whose Activity Constraint is to be set up.
3. Choose . The Activity Constraints window is displayed.
4. In the Activity Constraints window, choose the Single-SKU tab. The Single-SKU tab window for Activity Constraints is displayed.
5. In the Single-SKU tab window, choose the activity constraint that is to be deleted.
6. Choose .

### 8.2.2 Setting Up Activity Constraints for Containers

The constraints for the activity of a multi-SKU case or pallet are specified here. This also applies to multi-SKU CASE with LPN and PALLET with LPN.


Use the Activity Constraints for Containers set-up for:

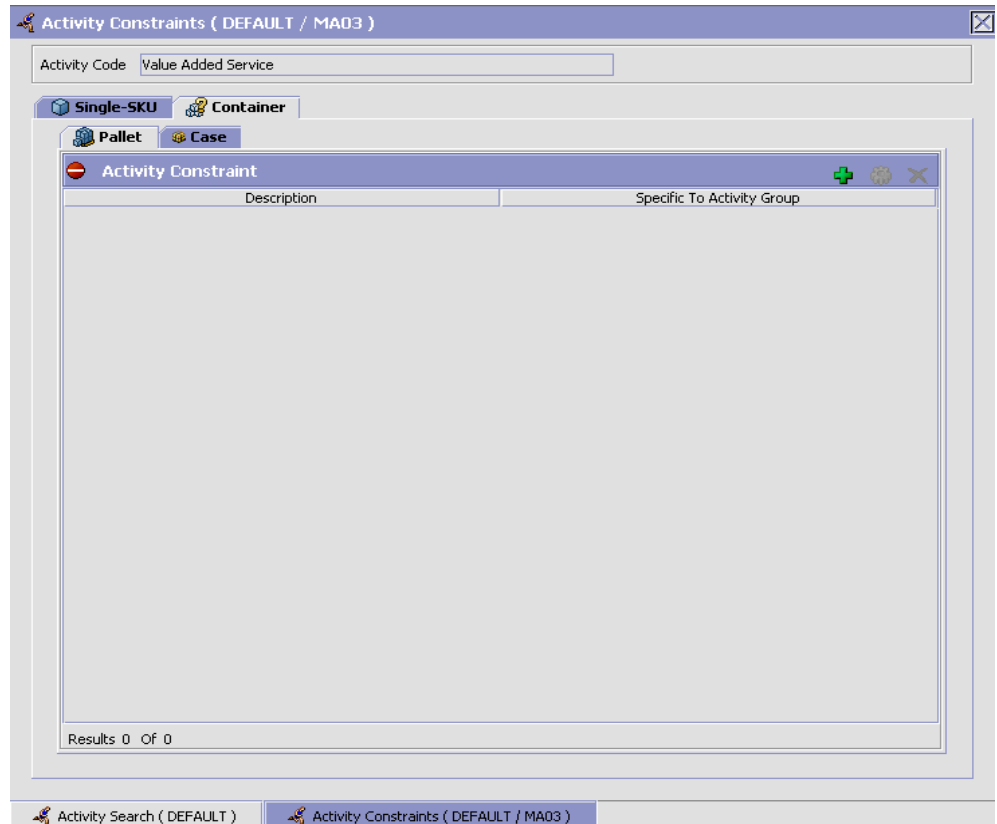
- [Creating an Activity Constraint for Containers](#)

- [Modifying an Activity Constraint for Containers](#)
- [Deleting an Activity Constraint for Containers](#)

### 8.2.2.1 Creating an Activity Constraint for Containers

To create an activity constraint for Containers:

1. From the tree in the application rules side panel, choose VAS > Activities. The Activity Search window is displayed, with the list of activities.
2. Choose the Activity Code whose Activity Constraint is to be set up.
3. Choose . The Activity Constraints window is displayed.
4. In the Activity Constraints window, choose the Container tab. The Container tab window for Activity Constraints is displayed.





Activity Constraints for Pallets and Cases are specified separately:

- [Setting Up Activity Constraints for Pallets](#)
- [Setting Up Activity Constraints for Cases](#)

#### 8.2.2.1.1 Setting Up Activity Constraints for Pallets

To set up activity constraints for pallets:

1. In the Container tab of Activity Constraints window, choose the Pallet tab. The Pallet tab window is displayed.
2. In the Pallet tab window, choose .
3. The Activity Constraint Details window appears.

- 4. Enter information in the applicable fields. Refer [Table 8–4](#) for field value descriptions.
- 5. Choose .

Activity Constraint Details ( DEFAULT / MA03 ) : Container with unknown contents : Pallet

Description



To View Strategy Click here

Activity Code

Value Added Service

Requesting Activity Group

Location Priorities

	Priority	Location
	2	Bulk Loc 
*		


Results 1 Of 1

Activity Search ( DEFAULT )

Activity Constraints ( DEFAULT / MA0...

Activity Constraint Details ( DEFAULT...


**Table 8–4 Activity Constraint Details - Pallet Tab**

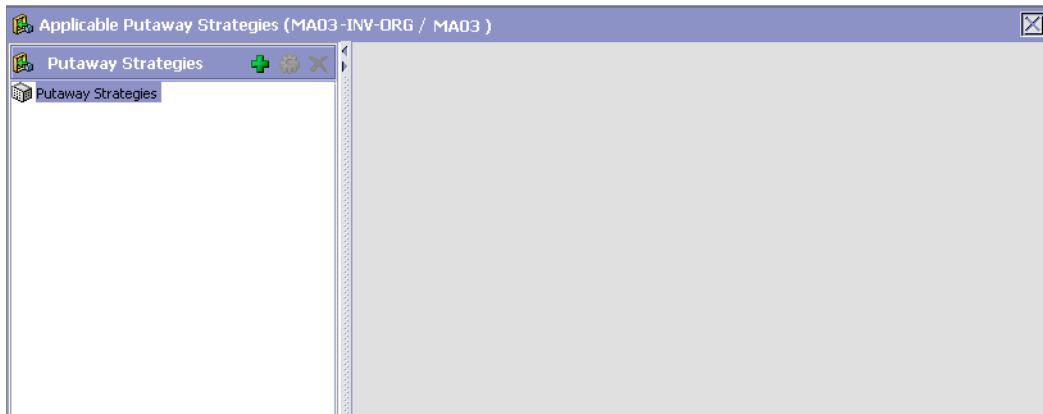
Field	Description
Description	Enter a description for the activity constraint.
To View Strategy Click here	<p>Choose  to view or set up Putaway Strategy. For more details on setting up a putaway strategy see <a href="#">Setting Up Putaway Strategy for Multi-SKU/Multi-Level Containers - Pallets</a>.</p> <p>Note: Putaway strategy may be specified for the putaway preferences after the preference is saved.</p>
Activity Code	This indicates the activity code for the constraint.
Requesting Activity Group	<p>Choose the requesting activity group.</p> <p>Typical values are Receipt, and Packing.</p>
<b>Location Priorities</b>	
Priority	<p>Enter a number to represent the priority.</p> <p>The priority is used to sequence the order in which the location priorities are evaluated. For example, all storage code level priorities are to be evaluated first before generic priorities.</p> <p>The priority needs to be a positive integer, greater than zero. This is a mandatory field.</p>
Location	<p>Choose the relevant location for the activity.</p> <p>This is a mandatory field.</p>



### Setting Up Putaway Strategy for Multi-SKU/Multi-Level Containers - Pallets

You can set up putaway strategies to putaway applicable inventory from a source zone to a target zone, based on the strategy specified.

To set up putaway strategy for multi-SKU/multi-level container pallets:

1. In the Activity Constraint Details : Multi-SKU/multi-level Containers : Pallet window, choose .
2. The Applicable Putaway Strategies window is displayed.



3. Choose  in the Putaway Strategies panel. The Putaway Strategy Details window appears in the right panel.
4. Enter information in the applicable fields. See the Putaway Strategy Details Window table for field value descriptions.
5. Choose .



**Putaway Strategy Details**

Description: Strategy for DVD-LockAndKey-EACH UOM: CASE

Item Classification

Product Line: DVD

StorageType: LockAndKey

Product Line:

---

**System Directed Putaway Task Types**

	Source Zone	Target Zone	Container Type	Task Type
*				

Results 0 Of 0

---

**Ad Hoc Task Types**




	Source Zone	Target Zone	Container Type	Task Type
*				

Results 0 Of 0

**Table 8–5 Putaway Strategy Details Window**

Field	Description
Description	Enter a description for the Putaway Strategy.
UOM	Select the UOM for the Putaway Strategy, if applicable. Note: The UOM will be defaulted in instances where it has been specified in the Putaway Preference Details screen.

**Table 8–5 Putaway Strategy Details Window**

Field	Description
<b>Item Classification</b>	List of putaway item classifications for the Enterprise are displayed. An example, Product Line is shown below.
Product Line	Choose relevant product line item classification for the putaway activity.  Choose  . In the Classification Values window, select the applicable product line classification.
<b>System Directed Putaway Task Types</b>	<b>Displays the list of existing system directed putaway task types.</b>  <b>You may use  to delete an existing system directed putaway task type.</b>
Source Zone	Select the source zone where inventory is available.
Target Zone	Select the target zone where you want to move the inventory.
Container Type	Select the container type to be used to move the inventory from the source zone to the target zone. Typical values are Case and Pallet.
Task Type	Select the Putaway Task Type applicable to this putaway strategy. This field displays the list of existing system directed task types that belong to the 'PUTAWAY' activity group.
<b>Ad hoc Task Types</b>	<b>Displays the list of existing ad hoc task types.</b>  <b>You may use  to delete an existing ad hoc task type.</b>
Source Zone	Select the source zone where inventory is available.
Target Zone	Select the target zone where you want to move the inventory.

**Table 8–5 Putaway Strategy Details Window**

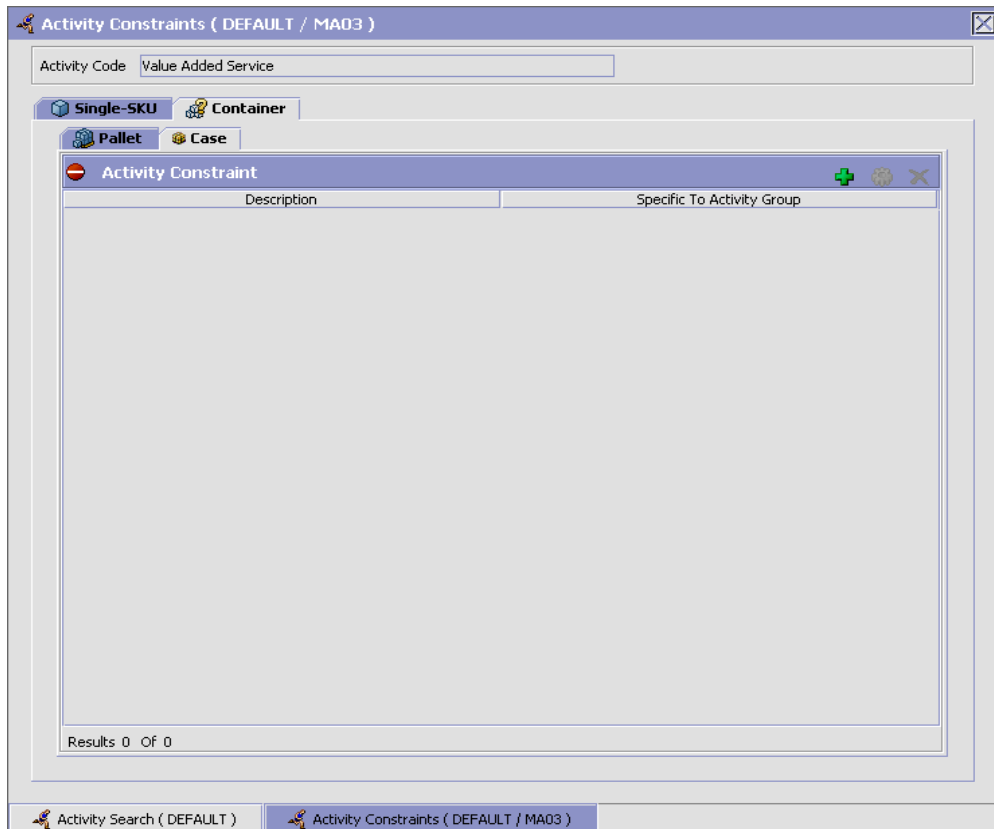
Field	Description
Container Type	Select the container type to be used to move the inventory from the source zone to the target zone. Typical values are Case and Pallet.
Task Type	Select the Putaway Task Type applicable to this putaway strategy. This field displays the list of existing ad hoc task types that belong to the 'PUTAWAY' activity group.



6.

#### 8.2.2.1.2 Setting Up Activity Constraints for Cases

To set up activity constraints for cases:

1. In the Container tab of Activity Constraints window, choose the Case tab. The Case tab window is displayed.



2. In the Case tab window, choose .
3. The Activity Constraint Details window appears.
4. Enter information in the applicable fields. Refer [Table 8–6](#) for field value descriptions.
5. Choose .

**Activity Constraint Details ( DEFAULT / MA03 ) : Container with unknown contents : Case**

Description  To View Strategy Click here

Activity Code  Requesting Activity Group

**Location Priorities**

Priority	Location
2	Bulk Loc
*	

Results 1 Of 1

Activity Search ( DEFAULT )   Activity Constraints ( DEFAULT / MA0...   **Activity Constraint Details ( DEFAULT...**

**Table 8–6 Activity Constraint Details - Case Tab**

Field	Description
Description	Enter a description for the activity constraint.
To View Strategy Click here	<p>Choose  to view or set up Putaway Strategy. For more details on setting up a putaway strategy see <a href="#">Setting Up Putaway Strategy for Multi-SKU/Multi-Level Containers - Cases</a>.</p> <p>Note: Putaway strategy may be specified for the putaway preferences after the preference is saved.</p>
Activity Code	This indicates the activity code for the constraint.


**Table 8–6 Activity Constraint Details - Case Tab**

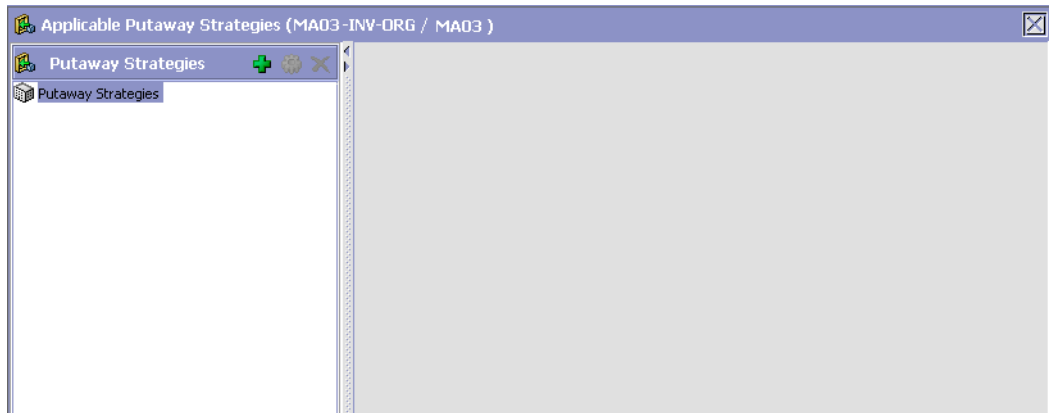
Field	Description
Requesting Activity Group	Choose the requesting activity group. Typical values are Receipt, and Packing.
<b>Location Priorities</b>	
Priority	Enter a number to represent the priority. The priority is used to sequence the order in which the location priorities are evaluated. For example, all storage code level priorities are to be evaluated first before generic priorities. The priority needs to be a positive integer, greater than zero. This is a mandatory field.
Location	Choose the relevant location for the activity. This is a mandatory field.



### Setting Up Putaway Strategy for Multi-SKU/Multi-Level Containers - Cases

You can set up putaway strategies to putaway applicable inventory from a source zone to a target zone, based on the strategy specified.

To set up putaway strategy for multi-SKU/multi-level container cases:

1. In the Activity Constraint Details : Multi-SKU/multi-level Containers : Case window, choose .
2. The Applicable Putaway Strategies window is displayed.



3. Choose  in the Putaway Strategies panel. The Putaway Strategy Details window appears in the right panel.
4. Enter information in the applicable fields. See the Putaway Strategy Details Window table for field value descriptions.
5. Choose .

Putaway Strategy Details

DescriptionStrategy for DVD-LockAndKey-EACHUOMCASE

Item Classification

Product LineDVD

StorageTypeLockAndKey

Product Line

System Directed Putaway Task Types

	Source Zone	Target Zone	Container Type	Task Type
*				

Results 0 Of 0

Ad Hoc Task Types

	Source Zone	Target Zone	Container Type	Task Type
*				




Results 0 Of 0

Table 8–7 Putaway Strategy Details Window

Field	Description
Description	Enter a description for the Putaway Strategy.
UOM	Select the UOM for the Putaway Strategy, if applicable. Note: The UOM will be defaulted in instances where it has been specified in the Putaway Preference Details screen.






**Table 8–7 Putaway Strategy Details Window**

Field	Description
<b>Item Classification</b>	List of putaway item classifications for the Enterprise are displayed. An example, Product Line is shown below.
Product Line	Choose relevant product line item classification for the putaway activity.  Choose  . In the Classification Values window, select the applicable product line classification.
<b>System Directed Putaway Task Types</b>	<b>Displays the list of existing system directed putaway task types.</b>  <b>You may use  to delete an existing system directed putaway task type.</b>
Source Zone	Select the source zone where inventory is available.
Target Zone	Select the target zone where you want to move the inventory.
Container Type	Select the container type to be used to move the inventory from the source zone to the target zone. Typical values are Case and Pallet.
Task Type	Select the Putaway Task Type applicable to this putaway strategy. This field displays the list of existing system directed task types that belong to the 'PUTAWAY' activity group.
<b>Ad hoc Task Types</b>	<b>Displays the list of existing ad hoc task types.</b>  <b>You may use  to delete an existing ad hoc task type.</b>
Source Zone	Select the source zone where inventory is available.
Target Zone	Select the target zone where you want to move the inventory.
Container Type	Select the container type to be used to move the inventory from the source zone to the target zone. Typical values are Case and Pallet.
Task Type	Select the Putaway Task Type applicable to this putaway strategy. This field displays the list of existing ad hoc task types that belong to the 'PUTAWAY' activity group.

6.



### 8.2.2.2 Modifying an Activity Constraint for Containers

To modify an activity constraint for containers:

1. From the tree in the application rules side panel, choose VAS > Activities. The Activity Search window is displayed, with the list of activities.
2. Choose the Activity Code whose Activity Constraint is to be set up.
3. Choose . The Activity Constraints window is displayed.
4. In the Activity Constraints window, choose the Container tab. The Container tab window for Activity Constraints is displayed.
5. In the Container tab window, choose the activity constraint that is to be modified.
6. Choose . The Activity Constraint Details window is displayed.
7. Enter information in the applicable fields. For more information about modifying the fields, see [Section 8.2.2.1.1, "Setting Up Activity Constraints for Pallets"](#) on page 639 and [Section 8.2.2.1.2, "Setting Up Activity Constraints for Cases"](#) on page 645.
8. Choose .

### 8.2.2.3 Deleting an Activity Constraint for Containers

To delete an activity constraint for containers:

1. From the tree in the application rules side panel, choose VAS > Activities. The Activity Search window is displayed, with the list of activities.
2. Choose the Activity Code whose Activity Constraint is to be set up.
3. Choose . The Activity Constraints window is displayed.
4. In the Activity Constraints window, choose the Container tab. The Container tab window for Activity Constraints is displayed.
5. In the Container tab window, choose the activity constraint that is to be deleted.
6. Choose .

## 8.3 Defining Retrieval Strategy

Retrieval Strategy defines the retrieval process to be followed when retrieving items for VAS. This is defined at the 'VAS' activity group level.

For example, requests created for retrieval of components for a work order specifying a location or zone to be retrieved to.

---

**Note:** It is recommended that Zones containing Locations of type VIRTUAL should not be selected, while configuring the Putaway Preferences and Retrieval Strategy.


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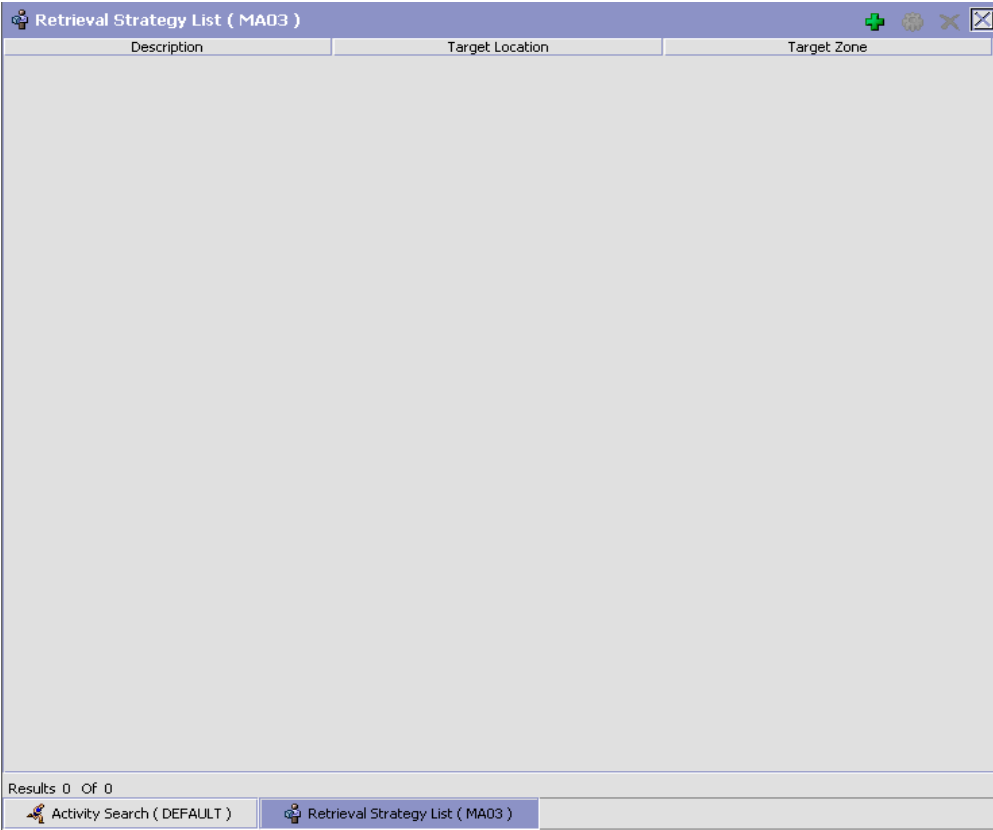
Use Retrieval Strategy for:



- [Creating a Retrieval Strategy](#)
- [Modifying a Retrieval Strategy](#)
- [Deleting a Retrieval Strategy](#)

### 8.3.1 Creating a Retrieval Strategy

To create a retrieval strategy:

1. From the tree in the application rules side panel, choose VAS > Activities. The Activity Search window is displayed, with the list of activities.
2. In the top right corner, choose . The Retrieval Strategy List window is displayed.



- 3. In the Retrieval Strategy List window, choose . The Retrieval Strategy Details window is displayed.
- 4. Enter information in the applicable fields. Refer [Table 8–8](#) for field value descriptions.
- 5. Choose .

Retrieval Strategy Details ( MA03 )

Description

☐ Target Location

☒ Target Zone

Activity Search ( DEFAULT )

Retrieval Strategy List ( MA03 )

Retrieval Strategy Details ( MA03 )

Table 8–8 Retrieval Strategy Details Window


Field	Description
Description	Enter a description for the retrieval strategy.

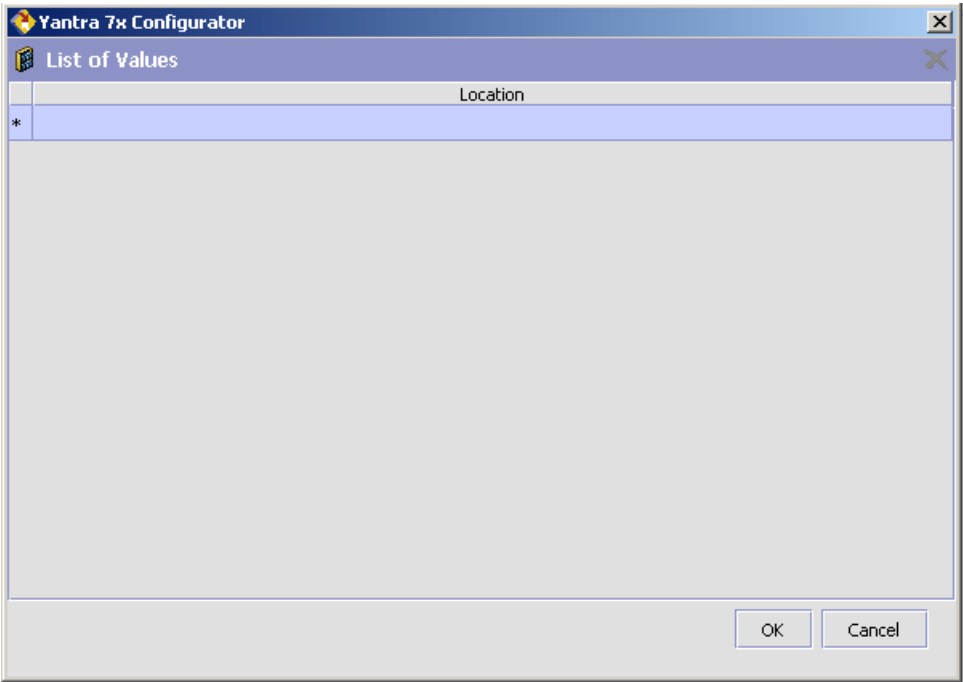
**Table 8–8 Retrieval Strategy Details Window**

Field	Description
Target Location	<p>Select if inventory is being retrieved to a specific location. For example, in retrieval for inspection strategy, inventory is retrieved to the Packing location in a warehouse.</p> <p>For more information about defining a target location, see <a href="#">Section 8.3.1.1, "Defining Target Location for Retrieval Strategy"</a> on page 656.</p>
Target Zone	<p>Select if inventory is being retrieved to any location in a particular zone. For example, in retrieval for receiving strategy, inventory is retrieved to the dock zone in a warehouse.</p> <p>For more information about defining a target location, see <a href="#">Section 8.3.1.2, "Defining Target Zone for Retrieval Strategy"</a> on page 657.</p>

### 8.3.1.1 Defining Target Location for Retrieval Strategy

To define a target location for the retrieval strategy:

1. In the Retrieval Strategy Details window, select 'Target Location'.
2. Choose . The List of Values pop-up window appears.
3. Enter information in the applicable fields. Refer [Table 8–9](#) for field value descriptions.
4. Choose OK.




**Table 8–9** *List of Values Pop-up Window*

Field	Description
Location	Choose the appropriate location for retrieval strategy.

### 8.3.1.2 Defining Target Zone for Retrieval Strategy

To define a target zone for the retrieval strategy:

1. In the Retrieval Strategy Details window, select 'Target Zone'.
2. Choose . The List of Values pop-up window appears.
3. Enter information in the applicable fields. Refer [Table 8–10](#) for field value descriptions.
4. Choose OK.

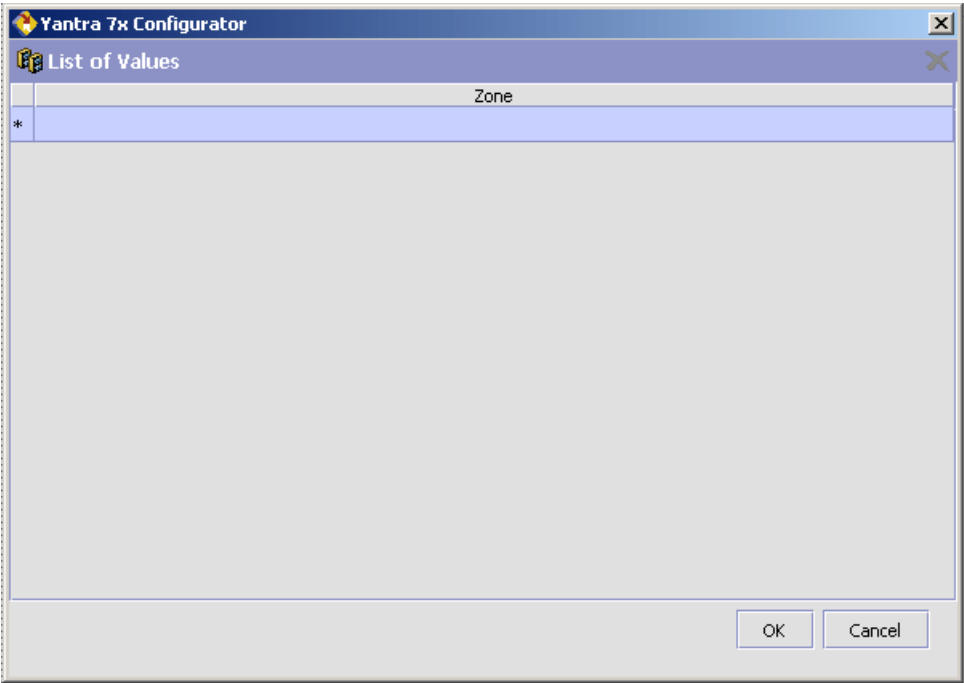


Table 8–10 List of Values Pop-up Window

Field	Description
Zone	Choose the appropriate zone for retrieval strategy.

8.3.1.2.1 Defining Pick Location Assignment

*Pick Location Assignment* (PLA) assigns the warehouse location(s) to the demand placed. PLA defines the list of zones to use for picking by specifying for a combination of item level attributes, such as classifications and unit of measure. Multiple PLA rules may be specified to ensure that the zone level constraints are unique to the item classification and unit of measure combination. For example, for SKUs stocked in pallets, cases and loose units, it is advisable to have 3 distinct rules to cover zones that are applicable for each unit of measure. The

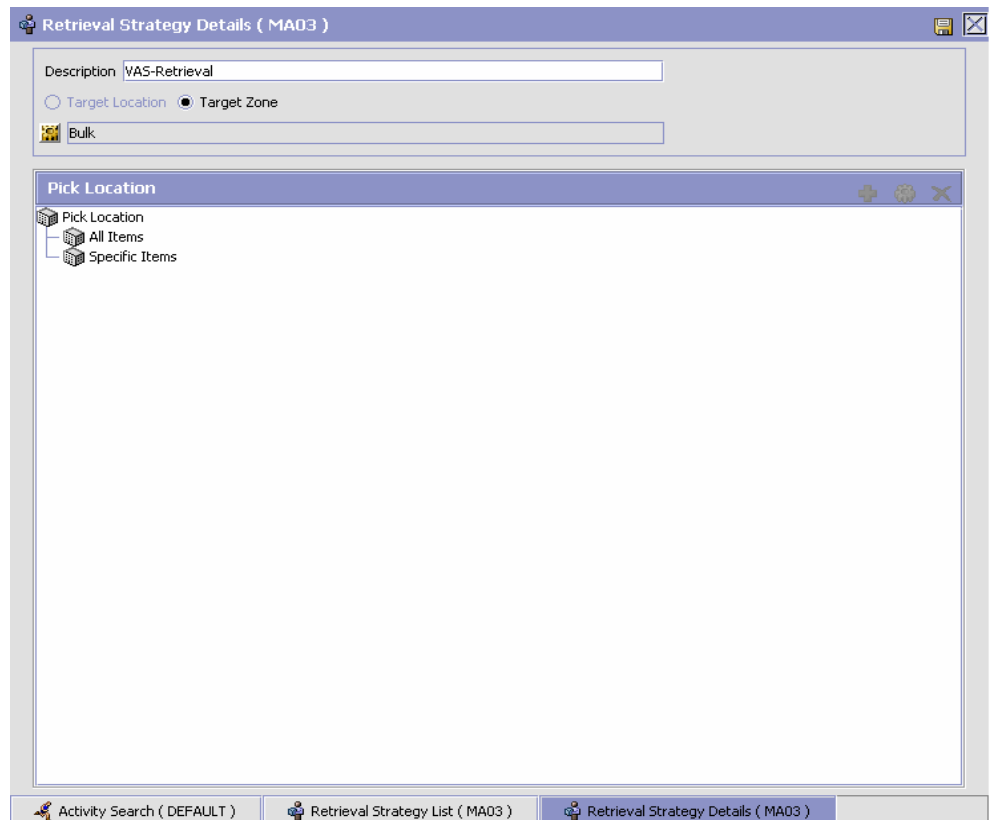


locations to be used in the zone can be filtered further by considering the least travel or pick-to-clean constraints.

After creating a Retrieval Strategy, you can define the Pick Location Assignment for the Retrieval Strategy.

To define pick location assignment:

1. On saving the Retrieval Strategy, the Pick Location panel is displayed in the Retrieval Strategy Details window.





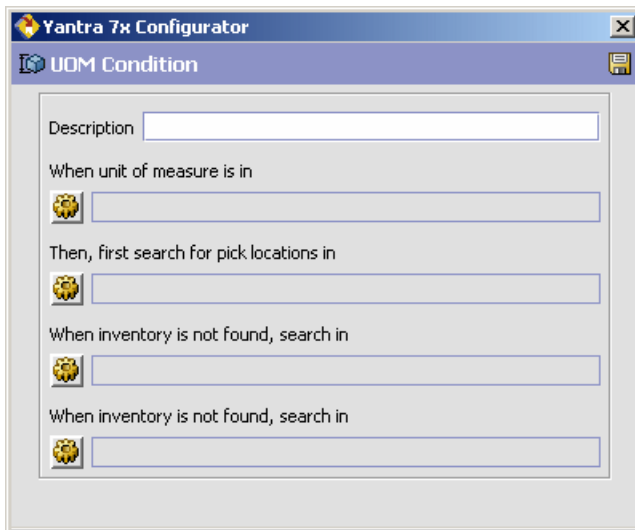
2. You can set up Pick Location Assignment for All Items or for Specific Items.

### Assigning Pick Location Rules for All Items

You can define global PLA rules for all items in a warehouse based on unit of measure.

To assign pick location rules for all items:



1. From the Pick Location tree in the Pick Location panel in the Retrieval Strategy Details window, select All Items.
2. Choose . The UOM Condition pop-up window is displayed.
3. Enter information in the applicable fields. Refer to [Table 8–11](#) for field value descriptions.
4. Choose .





The screenshot shows a window titled "Yantra 7x Configurator" with a sub-header "UOM Condition". The window contains several input fields with a gear icon to the left of each:

- Description:
- When unit of measure is in:
- Then, first search for pick locations in:
- When inventory is not found, search in:
- When inventory is not found, search in:

**Table 8–11 UOM Condition Pop-Up Window**

Field	Description
Description	Enter a brief description of the unit of measure condition.
When Unit of Measure is in	<p>You must specify the unit(s) of measure for which this condition is based. The system uses the pick location parameters that you specify to generate pick plans for items of the unit(s) of measure you select.</p> <p>Choose . The List of Values pop-up window is displayed. Select the blank line and choose a unit of measure from the drop-down menu. When you have finished adding units of measure, choose OK.</p>
Then First search for pick locations in	<p>You must specify the pick location parameters to be used initially.</p> <p>Choose . The Pick Location Assignment pop-up window is displayed. See <a href="#">The Pick Location Assignment Pop-Up Window</a> for field level descriptions.</p> <p>When you have finished defining pick location parameters, choose OK.</p>

**Table 8–11 UOM Condition Pop-Up Window**

Field	Description
When inventory is not found, search in	<p>You can define pick location parameters to be used if inventory is not found using the initial parameters.</p> <p>Choose . The Pick Location Assignment pop-up window is displayed. See <a href="#">The Pick Location Assignment Pop-Up Window</a> for field level descriptions.</p> <p>When you have finished defining pick location parameters, choose OK.</p>
When inventory is not found, search in	<p>You can define pick location parameters to be used if inventory is not found using the second set of parameters.</p> <p>Choose . The Pick Location Assignment pop-up window is displayed. See <a href="#">The Pick Location Assignment Pop-Up Window</a> for field level descriptions.</p> <p>When you have finished defining pick location parameters, choose OK.</p>

## The Pick Location Assignment Pop-Up Window

The Pick Location Assignment pop-up window is used to set the parameters used to determine the location from which items are picked. Refer to [Table 8–12](#) for field value descriptions.

**Yantra 7x Configurator**  
**Pick Location Assignment**

Description

**Location Selection**

1. Locations with Inventory Select locations having inventory from the following zones

Select Inventory only when it is in one of the following status

Optimize retrieval by ☒ Pick to clean ☐ Least number of trips

Round up quantity in a trip when possible to  
☐ Case ☐ Each ☐ Half Pallet ☐ Inner Pack ☐ Pallet

2. Dedicated Locations ☐ For the remaining demand, select dedicated location(s) from the zones listed above.  
☐ For items without dedicated locations dynamically slot a location from the zones listed above.

3. Cross Dock Locations For the demand left over from the previous steps, explore cross-docking opportunity.  
 Search for inbound shipments that are in following status

**Task Creation**


Task Type

OK Cancel



**Table 8–12 Pick Location Assignment Window**

Field	Description
Description	Enter a brief description of the pick location assignment parameters.
Location Selection	
Locations with Inventory	When this pick location assignment is used, the system initially tries to find the optimal location to pick inventory based on the parameters you define below.

**Table 8–12 Pick Location Assignment Window**

Field	Description
Select locations having inventory from the following zones	<p>You must specify the zones that you want to pick from when this pick location assignment is used.</p> <p>Choose . The List of Values pop-up window is displayed. Select the blank line and choose a zone from the drop-down menu. When you have finished adding zones, choose OK.</p>
Optimize retrieval by	<p>Choose Pick to Clean if you want the pick location assignment to locate a source for inventory and pick from it until there is no inventory available at that location.</p> <p>Choose Least Trips if you want to optimize the pick location assignment on making the least amount of trips while picking inventory.</p>
Round up quantity in a trip when possible to	<p>Select the unit of measure to round up to when retrieving inventory for replenishment. The round up will occur only in instances when there is sufficient inventory.</p> <p>For example, there is an item that is picked by EACH that needs to be replenished. 9 EACH needs to be replenished. 12 EACH make a CASE. If you select Case for this field, the algorithm rounds the unit of measure for this retrieval task from 9 EACH to 1 CASE.</p>
Dedicated Locations	For pick demand that exists after the 'Locations with Inventory' algorithm has been performed, the system looks for locations dedicated specifically for the inventory.
For the remaining demand, select dedicated location(s) from the zones listed above.	Select this field if you want any pick demand that was not fulfilled using the above parameters to be picked from dedicated locations in the zones you have specified for Locations with Inventory. By selecting this field the system uses replenishment to ensure that the dedicated location remains stocked with pickable inventory.
For items without dedicated locations, dynamically slot a location from the zones listed above.	Select this field if you want items that do not have a dedicated picking location to be dynamically slotted for picking. The location is dynamically slotted in the zones you have specified for Locations with Inventory.

**Table 8–12 Pick Location Assignment Window**


Field	Description
Cross Dock Locations	For any remaining pick demand, you can define the inbound shipment status levels from which items can be cross-docked. Cross-docking allows you to retrieve inventory directly from receiving staging locations and bring the inventory to a dynamically slotted location for picking.
Search in inbound shipments that are in following status	<p>You can specify the inbound shipment statuses that you want to search for inventory. The system searches for inbound shipments in the specified status(es). Once the shipment is received the system diverts the inventory to the dynamically slotted location.</p> <p>Choose . The List of Values pop-up window is displayed. Select the blank line and choose an inbound shipment status from the drop-down menu. When you have finished adding inbound shipment statuses, choose OK.</p>
Task Creation	
Task Type	<p>Choose the applicable task type.</p> <p>Choose  to create a new task type. For more information about Task Type, see <a href="#">Section 12.3, "Defining Task Types"</a> on page 887.</p>

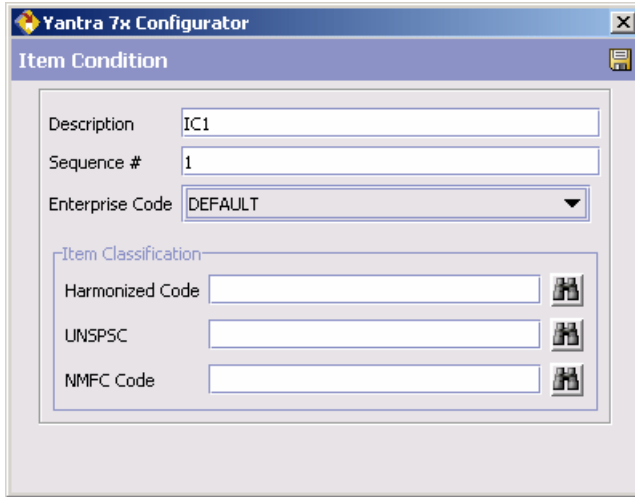
**Note:** For Dedicated Locations, Dynamic Slots, and Pick Fence, move request and replenish task will be created. For Cross Dock Locations, move request and replenish task are NOT created, instead the Wave Release will create "Activity Demand".

### Assigning Pick Location Rules for Specific Items

You can define PLA rules for items in a warehouse based on item classification and unit of measure.

To assign pick location for specific items:

1. From the Pick Location tree in the Pick Location panel in the Retrieval Strategy Details window, select Specific Items.
2. Choose . The Item Condition pop-up window is displayed.






3. In Description, enter a brief description of the item condition.
4. In Sequence #, enter the sequence number. Items are evaluated for the criteria you define. The sequence number determines the order by which item conditions evaluate items. Once an item matches up with a item condition's criteria, it uses the applicable pick location assignment algorithms.

**Note:** When an item is being requested for performing PLA, the item conditions are evaluated in a sequence. Once any of the conditions is evaluated as 'true', no more conditions are further evaluated. The evaluated condition is used for performing PLA.

5. From Enterprise Code, select the Enterprise you want to associate with the item condition.






6. In Item Classification, enter the applicable classification parameters as per your business practices. Fields used in Classifications are mapped to the Enterprise that you select for the item condition. For more information about configuring classifications, see the *Yantra 7x Product Management Configuration Guide*.
7. Choose .
8. From the Pick Location tree, select the item assignment you created and choose . The UOM Condition pop-up window is displayed.
9. Enter information in the applicable fields. Refer to [Table 8–11](#) for field value descriptions.
10. Choose .

### 8.3.2 Modifying a Retrieval Strategy


Once a Retrieval Strategy has been created, it can be modified.


To modify a retrieval strategy:

1. From the tree in the application rules side panel, choose VAS > Activities. The Activity Search window is displayed, with the list of activities.
2. In the top right corner, choose . The Retrieval Strategy List window is displayed with the list of Retrieval Strategies.
3. Choose the Retrieval Strategy to be modified. Choose . The Retrieval Strategy Details window is displayed.
4. Enter information in the applicable fields. Refer [Table 8–8](#) for field value descriptions.
5. Choose .

### 8.3.3 Deleting a Retrieval Strategy

To delete a retrieval strategy:

1. From the tree in the application rules side panel, choose VAS > Activities. The Activity Search window is displayed, with the list of activities.
2. In the top right corner, choose . The Retrieval Strategy List window is displayed with the list of Retrieval Strategies.

3. Choose the Retrieval Strategy to be deleted.
4. Choose .

## 8.4 Defining Putaway Preferences

Inventory being received at the dock require to be putaway to appropriate locations, based on shipment attributes, item classifications and location attributes.

The preferences for putting away of inventory is specified by zone and location storage attributes, for the SKU and container attributes.

**Note:** It is recommended that Zones containing Locations of type VIRTUAL should not be selected, while configuring the Putaway Preferences and Retrieval Strategy.

Use Putaway Preferences for:

- [Setting Up Putaway Preference for Single SKU](#)
- [Setting Up Putaway Preferences for Multiple SKU](#)
- [Setting Up Putaway Preferences for Container with Unknown Contents](#)

### 8.4.1 Setting Up Putaway Preference for Single SKU

The preferences for the putaway of a single SKU are specified here. This applies for all UOM of a SKU.


For example, the putaway strategy for a CASE, PALLET and loose quantity of a single SKU being putaway are specified here.

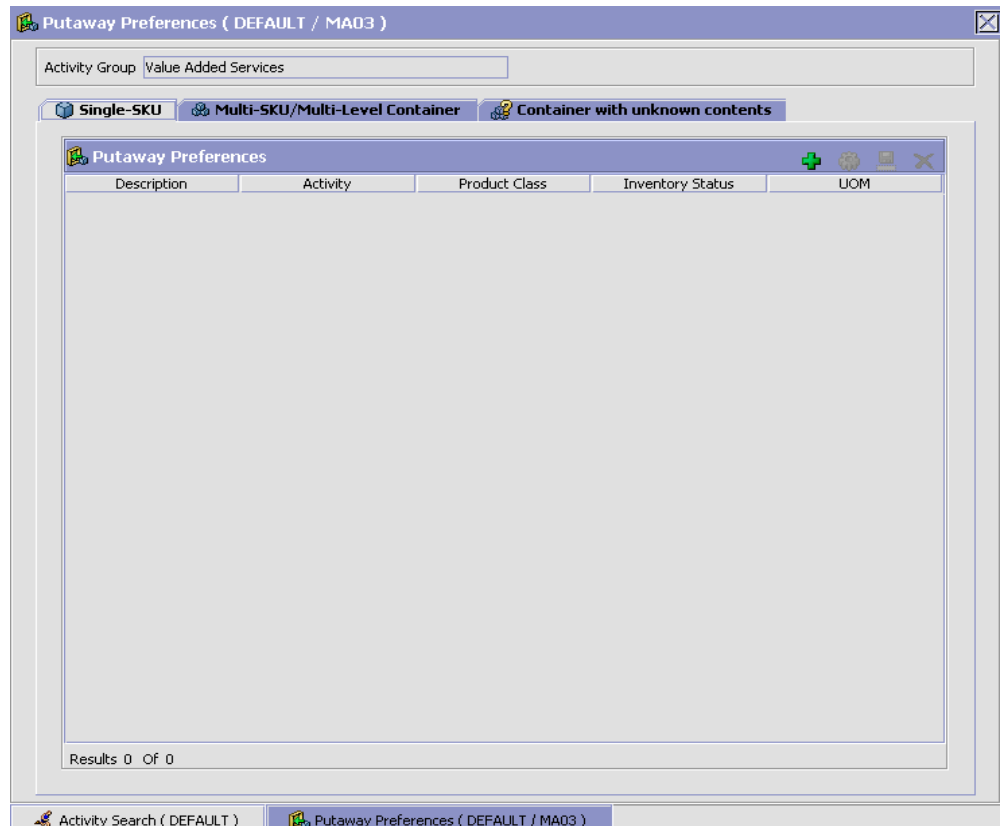
Use Putaway Preferences for Single SKU set-up for:


- [Creating a Putaway Preference for Single SKU](#)
- [Creating a New Putaway Preference for Single SKU from an existing Putaway Preference](#)
- [Modifying a Putaway Preference for Single SKU](#)
- [Deleting a Putaway Preference for Single SKU](#)


### 8.4.1.1 Creating a Putaway Preference for Single SKU

To create a putaway preference for single SKU:

1. From the tree in the application rules side panel, choose VAS > Activities. The Activity Search window is displayed, with the list of activities.
2. In the top right corner, choose . The Putaway Preferences window is displayed.
3. In the Putaway Preferences window, choose the Single-SKU tab. The Single-SKU tab window is displayed.



4. In the Single-SKU tab window, choose .
5. The Putaway Preference Details window appears.

- 6. Enter information in the applicable fields. Refer [Table 8–13](#) for field value descriptions.
- 7. Choose .

Putaway Preference Details ( DEFAULT / MA03 ) : Single-SKU

Activity GroupValue Added ServicesTo View Strategy Click here

Description

Activity CodeProduct Class

Inventory StatusSegment Type

SegmentUOM

Container Type

Item Classification

Zone Priorities

	Priority	Zone	Storage Code
D 3		Bulk	To store DVD Writers
*			


Results 1 Of 1

Activity Search ( DEFAULT )


Putaway Preferences ( DEFAULT / M...

Putaway Preference Details ( DEFAU...

**Table 8–13 Putaway Preference Details Window (Single SKU)**

Field	Description
Activity Group	This is automatically populated by the system as 'Value Added Services'.
To View Strategy Click here	Choose  to view or set up Putaway Strategy. For more details on setting up a putaway strategy see <a href="#">Setting Up Putaway Strategy for Single-SKUs</a> .  Note: Putaway strategy may be specified for the putaway preferences after the preference is saved.
Description	Enter a brief description for the putaway preference.
Activity Code	Choose the Activity Code for the putaway preference. This is a mandatory field.
Product Class	Choose the product class for the preference, if applicable.  Product class is the inventory classification of an item based on product's characteristics. Typical values are FQ - First Quality, SQ - Second Quality, etc.
Inventory Status	Choose the inventory status for the preference, if applicable.  Inventory status refers to an inventory sub classification based on the results of the inventory control processes within the warehouse.
Segment Type	Enter the segment type for the preference, if applicable.  This indicates an inventory category. Typical values are MTC – Made to Customer, and MTO - Made to Order.
Segment #	Enter the segment number for the preference, if applicable.  A segment holds either the specific buyer or specific order number that requires dedication.
UOM	Choose the UOM for the preference, if applicable. UOM points to the Unit of measure of the item.
Container Type	The container type associated with the UOM selected is displayed. Typical values are "Pallet" and "Case".

**Table 8–13 Putaway Preference Details Window (Single SKU)**


Field	Description
Item Classification	List of putaway item classifications for the Enterprise are displayed. An example, Product Line is shown below.
Product Line	Choose relevant product line item classification for the putaway activity.  Choose  . In the Classification window, select the applicable product line classification.
Zone Priorities	
Priority	Enter a number to represent the priority.  The priority is used to sequence the order in which the zone priorities are evaluated. For example, all storage code level priorities are to be evaluated first before generic priorities.  The priority needs to be a positive integer, greater than zero. This is mandatory.
Zone	Choose the relevant zone for putaway.  This is a mandatory field.
Storage Code	Choose the storage code for the zone, if applicable.  This limits the locations being evaluated to the storage code specified. For example, putaway of hazardous items into a zone are restricted to the locations having the appropriate storage code.

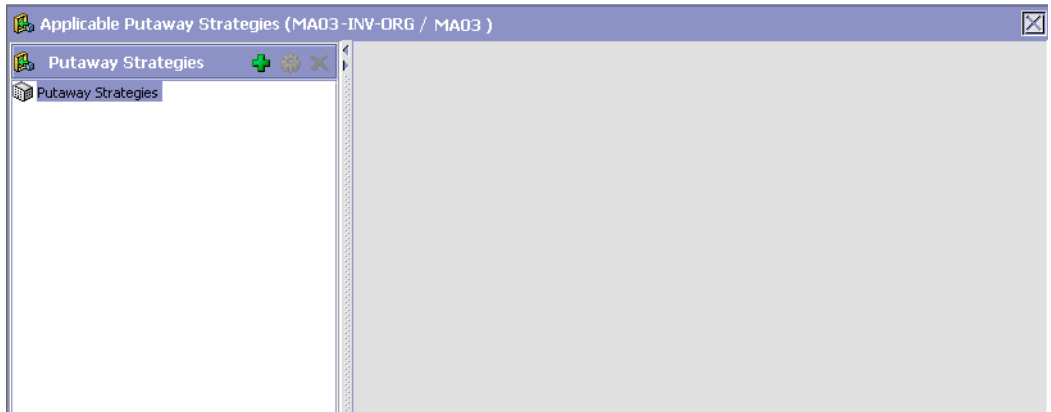
*Putaway strategy may be specified for the putaway preferences after the preference is saved. This is specified at an item classification and UOM level, if applicable.*



### Setting Up Putaway Strategy for Single-SKUs

You can set up putaway strategies to putaway applicable inventory from a source zone to a target zone, based on the strategy specified.

To set up putaway strategy for single-SKUs:

1. In the Putaway Preference Details : Single SKU window, choose .
2. The Applicable Putaway Strategies window is displayed.



3. Choose  in the Putaway Strategies panel. The Putaway Strategy Details window appears in the right panel.
4. Enter information in the applicable fields. See the Putaway Strategy Details Window table for field value descriptions.
5. Choose .

Putaway Strategy Details

DescriptionStrategy for DVD-LockAndKey-EACHUOMCASE

Item Classification

Product LineDVD

StorageTypeLockAndKey

Product Line

System Directed Putaway Task Types

	Source Zone	Target Zone	Container Type	Task Type
*				

Results 0 Of 0

Ad Hoc Task Types

	Source Zone	Target Zone	Container Type	Task Type
*				




Results 0 Of 0

Table 8–14 Putaway Strategy Details Window

Field	Description
Description	Enter a description for the Putaway Strategy.
UOM	Select the UOM for the Putaway Strategy, if applicable. Note: The UOM will be defaulted in instances where it has been specified in the Putaway Preference Details screen.






**Table 8–14 Putaway Strategy Details Window**

Field	Description
<b>Item Classification</b>	List of putaway item classifications for the Enterprise are displayed. An example, Product Line is shown below.
Product Line	Choose relevant product line item classification for the putaway activity.  Choose  . In the Classification Values window, select the applicable product line classification.
<b>System Directed Putaway Task Types</b>	<b>Displays the list of existing system directed putaway task types.</b>  <b>You may use  to delete an existing system directed putaway task type.</b>
Source Zone	Select the source zone where inventory is available.
Target Zone	Select the target zone where you want to move the inventory.
Container Type	Select the container type to be used to move the inventory from the source zone to the target zone. Typical values are Case and Pallet.
Task Type	Select the Putaway Task Type applicable to this putaway strategy. This field displays the list of existing system directed task types that belong to the 'PUTAWAY' activity group.
<b>Ad hoc Task Types</b>	<b>Displays the list of existing ad hoc task types.</b>  <b>You may use  to delete an existing ad hoc task type.</b>
Source Zone	Select the source zone where inventory is available.
Target Zone	Select the target zone where you want to move the inventory.
Container Type	Select the container type to be used to move the inventory from the source zone to the target zone. Typical values are Case and Pallet.
Task Type	Select the Putaway Task Type applicable to this putaway strategy. This field displays the list of existing ad hoc task types that belong to the 'PUTAWAY' activity group.

6.

### 8.4.1.2 Creating a New Putaway Preference for Single SKU from an existing Putaway Preference



To create a new putaway preference for single SKU from an existing putaway preference:


1. From the tree in the application rules side panel, choose VAS > Activities. The Activity Search window is displayed, with the list of activities.
2. In the top right corner, choose . The Putaway Preferences window is displayed.
3. In the Putaway Preferences window, choose the Single-SKU tab.
4. The Single-SKU tab window is displayed, with the list of putaway preferences.
5. Select the putaway preference to be copied from. Choose .
6. The Putaway Preference Details window is displayed.
7. Enter information in the applicable fields. Refer [Table 8–13](#) for field value descriptions.
8. Choose .

### 8.4.1.3 Modifying a Putaway Preference for Single SKU

Once a Putaway Preference for Single SKU has been created, it can be modified.

To modify a putaway preference for single SKU:



1. From the tree in the application rules side panel, choose VAS > Activities. The Activity Search window is displayed, with the list of activities.
2. In the top right corner, choose . The Putaway Preferences window is displayed.
3. In the Putaway Preferences window, choose the Single-SKU tab.
4. The Single-SKU tab window is displayed, with the list of putaway preferences.
5. Select the putaway preference to be modified. Choose .

6. The Putaway Preference Details window is displayed.
7. Enter information in the applicable fields. Refer [Table 8–13](#) for field value descriptions.
8. Choose .

Only the description and item classification values not previously used may be specified. Additional zone priorities may also be specified. For any other changes, the preference must be deleted.

#### 8.4.1.4 Deleting a Putaway Preference for Single SKU

To delete a putaway preference for single SKU:

1. From the tree in the application rules side panel, choose VAS > Activities. The Activity Search window is displayed, with the list of activities.
2. In the top right corner, choose . The Putaway Preferences window is displayed.
3. In the Putaway Preferences window, choose the Single-SKU tab.
4. The Single-SKU tab window is displayed, with the list of putaway preferences.
5. Select the putaway preference to be deleted.
6. Choose .

### 8.4.2 Setting Up Putaway Preferences for Multiple SKU


The preferences for the putaway of a multi-SKU case or pallet, and multi-level LPNs are specified here. This also applies to multi-SKU CASE with LPN and PALLET with LPN.

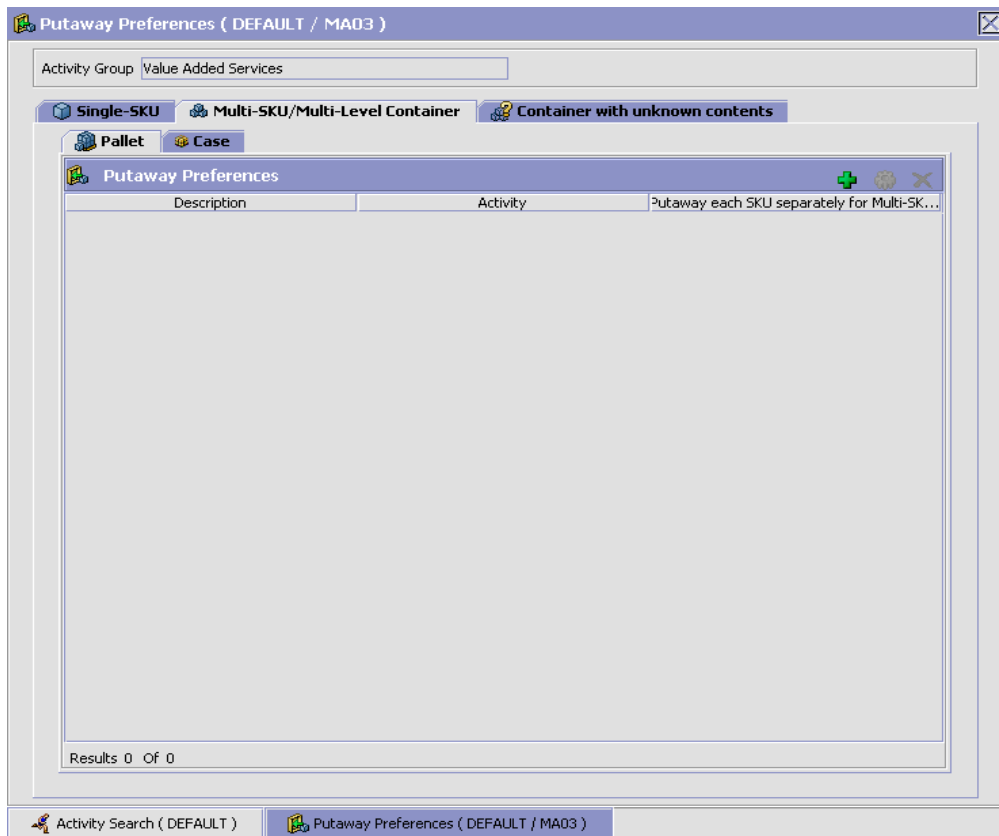
Use the Putaway Preferences for Multiple SKU set-up for:

- [Creating a Putaway Preference for Multiple SKU](#)
- [Creating a New Putaway Preference for Multiple SKU from an Existing Putaway Preference](#)
- [Modifying a Putaway Preference for Multiple SKU](#)
- [Deleting a Putaway Preference for Multiple SKU](#)

### 8.4.2.1 Creating a Putaway Preference for Multiple SKU

To create a putaway preference for multiple SKU:

1. From the tree in the application rules side panel, choose VAS > Activities. The Activity Search window is displayed, with the list of activities.
2. In the top right corner, choose . The Putaway Preferences window is displayed.
3. In the Putaway Preferences window, choose the Multi-SKU/Multi-Level Container tab. The Multi-SKU/Multi-Level Container tab window is displayed.





Putaway preferences for multi-SKU cases or pallets are specified separately:

- [Setting Up Putaway Preference for a Pallet](#)
- [Setting Up Putaway Preference for a Case](#)

#### **8.4.2.1.1 Setting Up Putaway Preference for a Pallet**

To set up putaway preference for a pallet:

1. In the Multi-SKU/Multi-Level Container tab of Putaway Preferences window, choose the Pallet tab. The Pallet tab window is displayed.
2. In the Pallet tab window, choose .
3. The Putaway Preference Details window appears.
4. Enter information in the applicable fields. Refer [Table 8–15](#) for field value descriptions.
5. Choose .

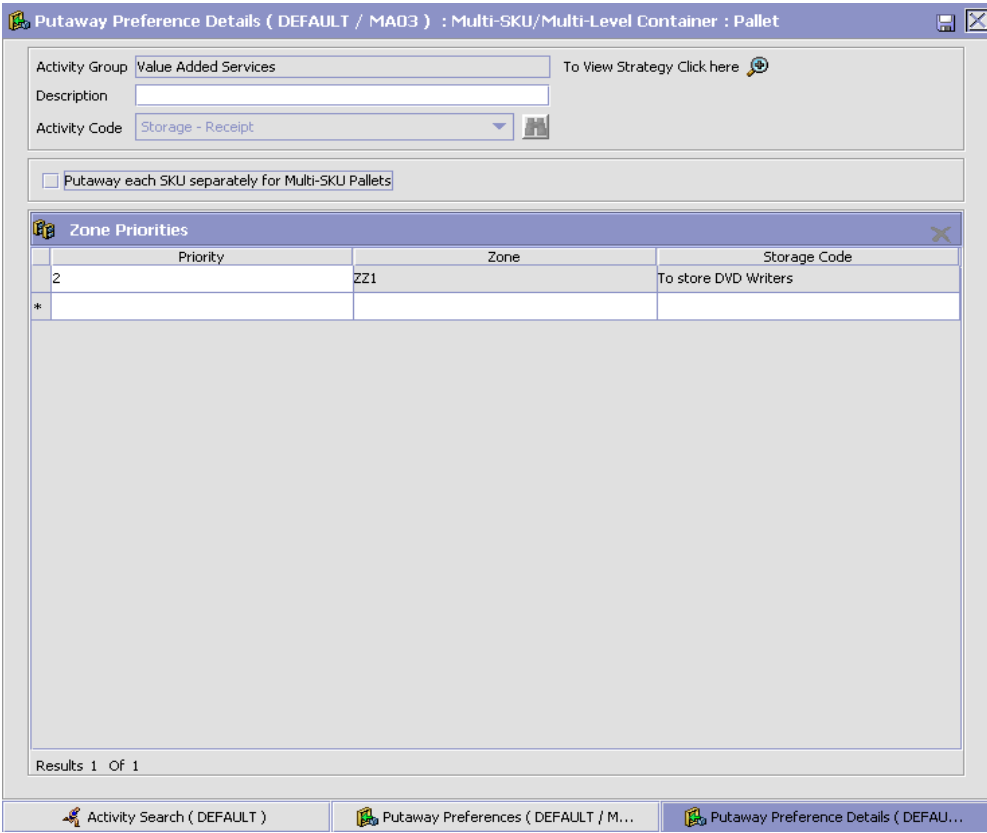



Table 8–15 Putaway Preference Details Window (Multi-Level)

Field	Description
Activity Group	This is automatically populated by the system as 'Value Added Services'.
To View Strategy Click here	<p>Choose  to view or set up Putaway Strategy. For more details on setting up a putaway strategy see <a href="#">Setting Up Putaway Strategy for Multi-SKU/Multi-Level Containers - Pallets</a>.</p> <p>Note: Putaway strategy may be specified for the putaway preferences after the preference is saved.</p>

**Table 8–15 Putaway Preference Details Window (Multi-Level)**


Field	Description
Description	Enter a brief description for the putaway preference.
Activity Code	Choose the Activity Code for the putaway preference. This is a mandatory field.
Put away each SKU separately for Multi-SKU Pallets	Select if each SKU on the multi-SKU pallet is evaluated individually.  If selected, the putaway preferences for a single SKU are evaluated for the multi-SKU pallet. The Zone Priorities Panel is removed on this selection.
<b>Zone Priorities</b>	
Priority	Enter a number to represent the priority.  The priority is used to sequence the order in which the zone priorities are evaluated. For example, all storage code level priorities are to be evaluated first before generic priorities.  The priority needs to be a positive integer, greater than zero. This is mandatory.
Zone	Choose the relevant zone for putaway. This is a mandatory field.
Storage Code	Choose the storage code for the zone, if applicable.  This limits the locations being evaluated to the storage code specified. For example, putaway of hazardous items into a zone are restricted to the locations having the appropriate storage code.

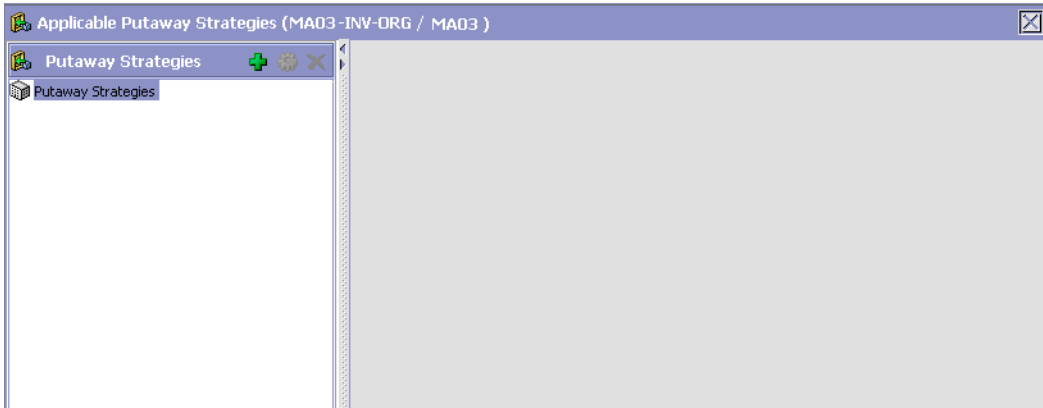
*Putaway strategy may be specified for the putaway preferences after the preference is saved. This is specified at an item classification and UOM level, if applicable.*



### **Setting Up Putaway Strategy for Multi-SKU/Multi-Level Containers - Pallets**

You can set up putaway strategies to putaway applicable inventory from a source zone to a target zone, based on the strategy specified.

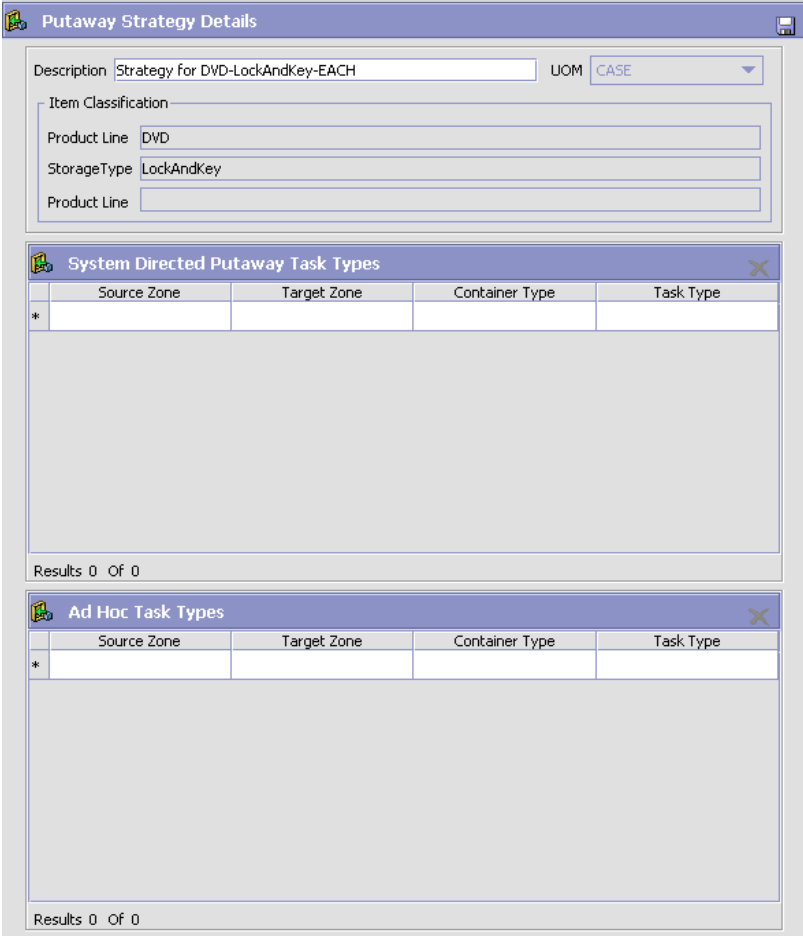
To set up putaway strategy for multi-SKU/multi-level container pallets:

1. In the Putaway Preference Details : Multi-SKU/multi-level Containers : Pallet window, choose .
2. The Applicable Putaway Strategies window is displayed.



3. Choose  in the Putaway Strategies panel. The Putaway Strategy Details window appears in the right panel.
4. Enter information in the applicable fields. See the Putaway Strategy Details Window table for field value descriptions.
5. Choose .





**Putaway Strategy Details**

Description: Strategy for DVD-LockAndKey-EACH UOM: CASE

Item Classification

Product Line: DVD

StorageType: LockAndKey

Product Line:

---

**System Directed Putaway Task Types**

	Source Zone	Target Zone	Container Type	Task Type
*				

Results 0 Of 0

---

**Ad Hoc Task Types**




	Source Zone	Target Zone	Container Type	Task Type
*				

Results 0 Of 0

**Table 8–16 Putaway Strategy Details Window**

Field	Description
Description	Enter a description for the Putaway Strategy.
UOM	Select the UOM for the Putaway Strategy, if applicable. Note: The UOM will be defaulted in instances where it has been specified in the Putaway Preference Details screen.

**Table 8–16 Putaway Strategy Details Window**

Field	Description
<b>Item Classification</b>	List of putaway item classifications for the Enterprise are displayed. An example, Product Line is shown below.
Product Line	Choose relevant product line item classification for the putaway activity.  Choose  . In the Classification Values window, select the applicable product line classification.
<b>System Directed Putaway Task Types</b>	<b>Displays the list of existing system directed putaway task types.</b>  <b>You may use  to delete an existing system directed putaway task type.</b>
Source Zone	Select the source zone where inventory is available.
Target Zone	Select the target zone where you want to move the inventory.
Container Type	Select the container type to be used to move the inventory from the source zone to the target zone. Typical values are Case and Pallet.
Task Type	Select the Putaway Task Type applicable to this putaway strategy. This field displays the list of existing system directed task types that belong to the 'PUTAWAY' activity group.
<b>Ad hoc Task Types</b>	<b>Displays the list of existing ad hoc task types.</b>  <b>You may use  to delete an existing ad hoc task type.</b>
Source Zone	Select the source zone where inventory is available.
Target Zone	Select the target zone where you want to move the inventory.

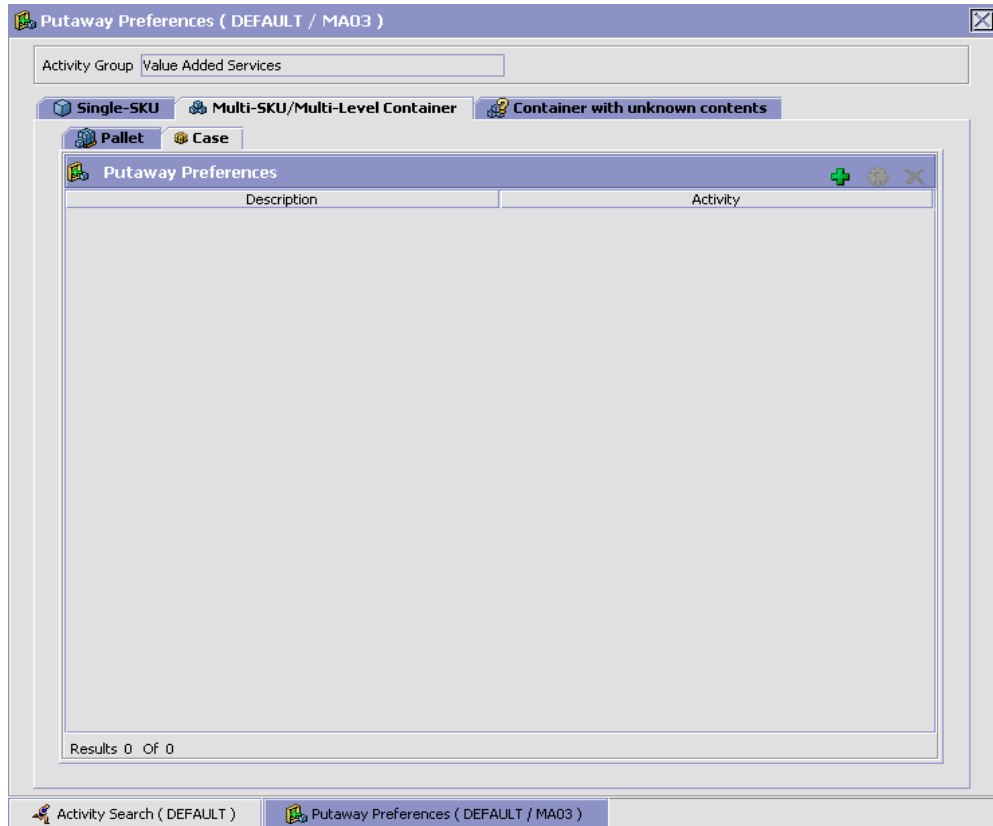
**Table 8–16 Putaway Strategy Details Window**



Field	Description
Container Type	Select the container type to be used to move the inventory from the source zone to the target zone. Typical values are Case and Pallet.
Task Type	Select the Putaway Task Type applicable to this putaway strategy. This field displays the list of existing ad hoc task types that belong to the 'PUTAWAY' activity group.

#### 8.4.2.1.2 Setting Up Putaway Preference for a Case

To set up putaway preference for a case:

1. In the Multi-SKU/Multi-Level Container tab of Putaway Preferences window, choose the Case tab. The Case tab window is displayed.



2. In the Case tab window, choose .
3. The Putaway Preference Details window appears.
4. Enter information in the applicable fields. Refer [Table 8–17](#) for field value descriptions.
5. Choose .

**Putaway Preference Details ( DEFAULT / MA03 ) : Multi-SKU/Multi-Level Container : Case**

Activity Group: Value Added Services To View Strategy Click here

Description:

Activity Code: Storage - Receipt


**Zone Priorities**

Priority	Zone	Storage Code
2	Bulk	To store DVD Writers
*		

Results 1 Of 1

Activity Search ( DEFAULT ) Putaway Preferences ( DEFAULT / M... Putaway Preference Details ( DEFAU...

**Table 8–17 Putaway Preference Details Window (Multi-Level Case)**

Field	Description
Activity Group	This is automatically populated by the system as 'Value Added Services'.
To View Strategy Click here	<p>Choose  to view or set up Putaway Strategy. For more details on setting up a putaway strategy see <a href="#">Setting Up Putaway Strategy for Multi-SKU/Multi-Level Containers - Cases</a>.</p> <p>Note: Putaway strategy may be specified for the putaway preferences after the preference is saved.</p>

**Table 8–17 Putaway Preference Details Window (Multi-Level Case)**


Field	Description
Description	Enter a brief description for the putaway preference.
Activity Code	Choose the Activity Code for the putaway preference. This is a mandatory field.
<b>Zone Priorities</b>	
Priority	Enter a number to represent the priority.  The priority is used to sequence the order in which the zone priorities are evaluated. For example, all storage code level priorities are to be evaluated first before generic priorities.  The priority needs to be a positive integer, greater than zero. This is mandatory.
Zone	Choose the relevant zone for putaway. This is a mandatory field.
Storage Code	Choose the storage code for the zone, if applicable.  This limits the locations being evaluated to the storage code specified. For example, putaway of hazardous items into a zone are restricted to the locations having the appropriate storage code.

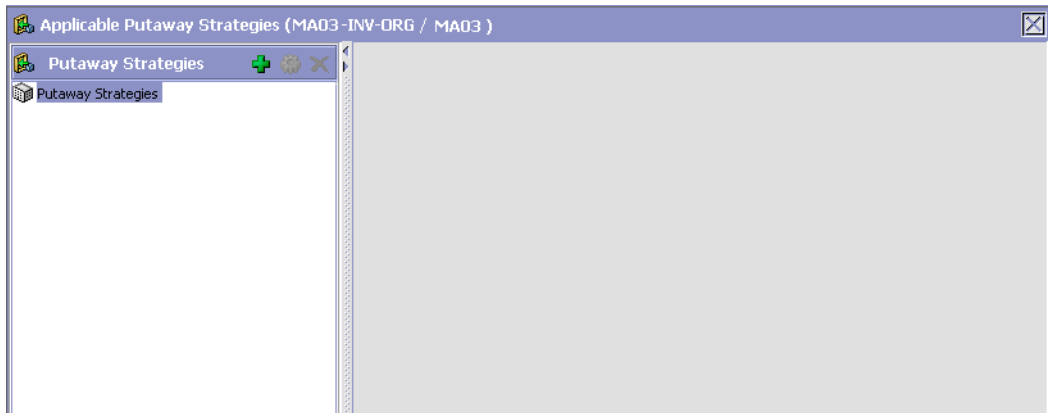
*Putaway strategy may be specified for the putaway preferences after the preference is saved. This is specified at an item classification and UOM level, if applicable.*



### Setting Up Putaway Strategy for Multi-SKU/Multi-Level Containers - Cases

You can set up putaway strategies to putaway applicable inventory from a source zone to a target zone, based on the strategy specified.

To set up putaway strategy for multi-SKU/multi-level container cases:

1. In the Putaway Preference Details : Multi-SKU/multi-level Containers : Case window, choose .
2. The Applicable Putaway Strategies window is displayed.



3. Choose  in the Putaway Strategies panel. The Putaway Strategy Details window appears in the right panel.
4. Enter information in the applicable fields. See the Putaway Strategy Details Window table for field value descriptions.
5. Choose .

Putaway Strategy Details

DescriptionStrategy for DVD-LockAndKey-EACHUOMCASE

Item Classification

Product LineDVD

StorageTypeLockAndKey

Product Line

System Directed Putaway Task Types

	Source Zone	Target Zone	Container Type	Task Type
*				

Results 0 Of 0

Ad Hoc Task Types

	Source Zone	Target Zone	Container Type	Task Type
*				




Results 0 Of 0

Table 8–18 Putaway Strategy Details Window

Field	Description
Description	Enter a description for the Putaway Strategy.
UOM	Select the UOM for the Putaway Strategy, if applicable. Note: The UOM will be defaulted in instances where it has been specified in the Putaway Preference Details screen.






**Table 8–18 Putaway Strategy Details Window**

Field	Description
<b>Item Classification</b>	List of putaway item classifications for the Enterprise are displayed. An example, Product Line is shown below.
Product Line	Choose relevant product line item classification for the putaway activity.  Choose  . In the Classification Values window, select the applicable product line classification.
<b>System Directed Putaway Task Types</b>	<b>Displays the list of existing system directed putaway task types.</b>  <b>You may use  to delete an existing system directed putaway task type.</b>
Source Zone	Select the source zone where inventory is available.
Target Zone	Select the target zone where you want to move the inventory.
Container Type	Select the container type to be used to move the inventory from the source zone to the target zone. Typical values are Case and Pallet.
Task Type	Select the Putaway Task Type applicable to this putaway strategy. This field displays the list of existing system directed task types that belong to the 'PUTAWAY' activity group.
<b>Ad hoc Task Types</b>	<b>Displays the list of existing ad hoc task types.</b>  <b>You may use  to delete an existing ad hoc task type.</b>
Source Zone	Select the source zone where inventory is available.
Target Zone	Select the target zone where you want to move the inventory.
Container Type	Select the container type to be used to move the inventory from the source zone to the target zone. Typical values are Case and Pallet.
Task Type	Select the Putaway Task Type applicable to this putaway strategy. This field displays the list of existing ad hoc task types that belong to the 'PUTAWAY' activity group.

6.

### 8.4.2.2 Creating a New Putaway Preference for Multiple SKU from an Existing Putaway Preference


To create a new putaway preference for multiple SKU from an existing putaway preference:



1. From the tree in the application rules side panel, choose VAS > Activities. The Activity Search window is displayed, with the list of activities.
2. In the top right corner, choose . The Putaway Preferences window is displayed.
3. In the Putaway Preferences window, choose the Multi-SKU/Multi-Level Container tab.
4. The Multi-SKU/Multi-Level Container tab window is displayed, with the list of putaway preferences.
5. Select the putaway preference to be copied from. Choose .
6. The Putaway Preference Details window is displayed.
7. Enter information in the applicable fields. For more information about modifying the fields, refer to [Section 8.4.2.1.1, "Setting Up Putaway Preference for a Pallet"](#) on page 679 and [Section 8.4.2.1.2, "Setting Up Putaway Preference for a Case"](#) on page 685.
8. Choose .

### 8.4.2.3 Modifying a Putaway Preference for Multiple SKU

Once a Putaway Preference for Multiple SKU has been created, it can be modified.

To modify a putaway preference for multiple SKU:



1. From the tree in the application rules side panel, choose VAS > Activities. The Activity Search window is displayed, with the list of activities.
2. In the top right corner, choose . The Putaway Preferences window is displayed.
3. In the Putaway Preferences window, choose the Multi-SKU/Multi-Level Container tab.

4. The Multi-SKU/Multi-Level Container tab window is displayed, with the list of putaway preferences.
5. Select the putaway preference to be modified. Choose .
6. The Putaway Preference Details window is displayed.
7. Enter information in the applicable fields. For more information about modifying the fields, refer to [Section 8.4.2.1.1, "Setting Up Putaway Preference for a Pallet"](#) on page 679 and [Section 8.4.2.1.2, "Setting Up Putaway Preference for a Case"](#) on page 685.
8. Choose .

The activity code corresponding to the preference cannot be modified. The preference must be deleted and recreated.

#### 8.4.2.4 Deleting a Putaway Preference for Multiple SKU

To delete a putaway preference for multiple SKU:

1. From the tree in the application rules side panel, choose VAS > Activities. The Activity Search window is displayed, with the list of activities.
2. In the top right corner, choose . The Putaway Preferences window is displayed.
3. In the Putaway Preferences window, choose the Multi-SKU/Multi-Level Container tab.
4. The Multi-SKU/Multi-Level Container tab window is displayed, with the list of putaway preferences.
5. Select the putaway preference to be deleted.
6. Choose .

### 8.4.3 Setting Up Putaway Preferences for Container with Unknown Contents

The preferences for the putaway of container with unknown contents are specified here. This applies to case and pallet with LPN where contents are not known.


For example, pre-receipt steps during receiving or returns where LPN labels may be scanned. Also, this applies to containers that are cross-docked to shipping lane upon receipt in merge in-transit centers.

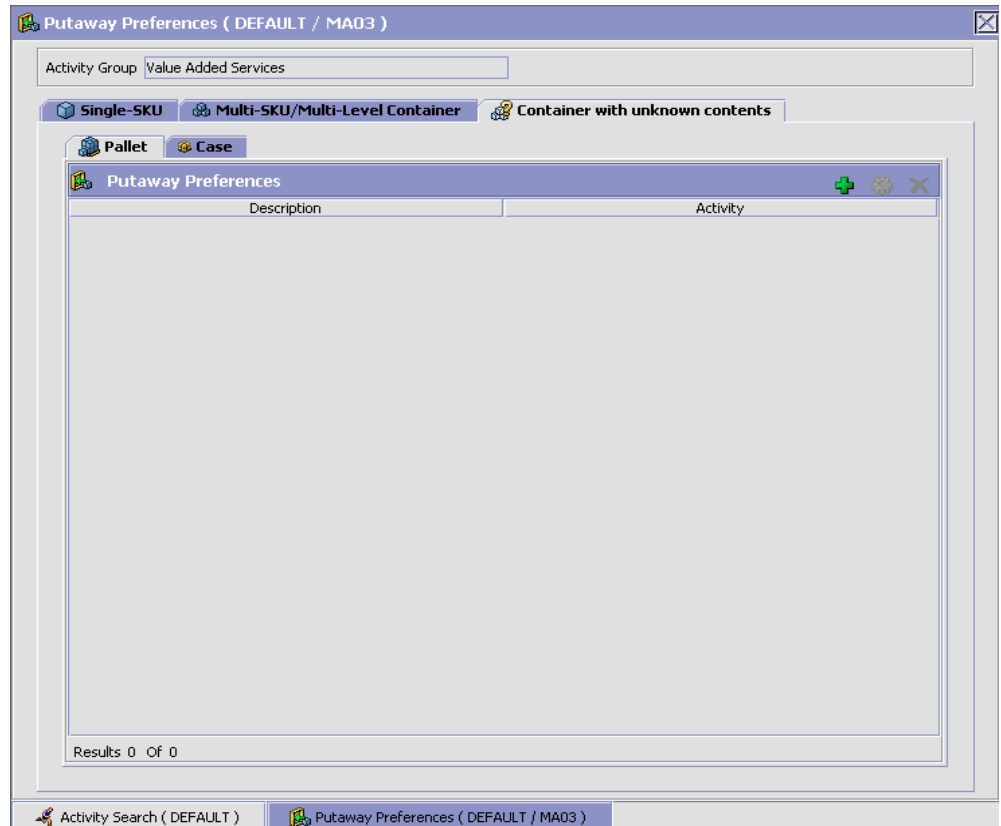
Use Putaway Preferences for Container with Unknown Contents set-up for:

- [Creating a Putaway Preference for Container with Unknown Contents](#)
- [Creating a New Putaway Preference for Container with Unknown Contents from an Existing Putaway Preference](#)
- [Modifying a Putaway Preference for Container with Unknown Contents](#)
- [Deleting a Putaway Preference for Container with Unknown Contents](#)

### 8.4.3.1 Creating a Putaway Preference for Container with Unknown Contents

To create a putaway preference for container with unknown contents:

1. From the tree in the application rules side panel, choose VAS > Activities. The Activity Search window is displayed, with the list of activities.
2. In the top right corner, choose . The Putaway Preferences window is displayed.
3. In the Putaway Preferences window, choose the Container with Unknown Contents tab. The Container with Unknown Contents tab window is displayed.





Putaway preferences are separately specified for a pallet and case:

- [Setting Up Putaway Preference for a Pallet](#)
- [Setting Up Putaway Preference for a Case](#)


#### 8.4.3.1.1 Setting Up Putaway Preference for a Pallet

To set up putaway preference for a pallet:


1. In the Container with Unknown Contents tab of Putaway Preferences window, choose the Pallet tab. The Pallet tab window is displayed.
2. In the Pallet tab window, choose .
3. The Putaway Preference Details window appears.


4. Enter information in the applicable fields. Refer [Table 8–19](#) for field value descriptions.
5. Choose .

**Putaway Preference Details ( DEFAULT / MA03 ) : Container with unknown contents : Pallet**

Activity Group: Value Added Services To View Strategy Click here 

Description:

Activity Code: Value Added Service 


**Zone Priorities** 

	Priority	Zone	Storage Code
1		ZZ1	To store DVD Writers
*			

Results 1 Of 1

Activity Search ( DEFAULT ) Putaway Preferences ( DEFAULT / M... Putaway Preference Details ( DEFAU...

**Table 8–19 Putaway Preference Details Window - Container with Unknown Contents Pallet Tab**


Field	Description
Activity Group	This is automatically populated by the system as 'Value Added Services'.
To View Strategy Click here	<p>Choose  to view or set up Putaway Strategy. For more details on setting up a putaway strategy see <a href="#">Setting Up Putaway Strategy for Containers with Unknown Contents - Pallets</a>.</p> <p>Note: Putaway strategy may be specified for the putaway preferences after the preference is saved.</p>
Description	Enter a brief description for the putaway preference.
Activity Code	Choose the Activity Code for the putaway preference. This is a mandatory field.
<b>Zone Priorities</b>	
Priority	<p>Enter a number to represent the priority.</p> <p>The priority is used to sequence the order in which the zone priorities are evaluated. For example, all storage code level priorities are to be evaluated first before generic priorities.</p> <p>The priority needs to be a positive integer, greater than zero. This is mandatory.</p>
Zone	Choose the relevant zone for putaway. This is a mandatory field.
Storage Code	<p>Choose the storage code for the zone, if applicable.</p> <p>This limits the locations being evaluated to the storage code specified. For example, putaway of hazardous items into a zone are restricted to the locations having the appropriate storage code.</p>

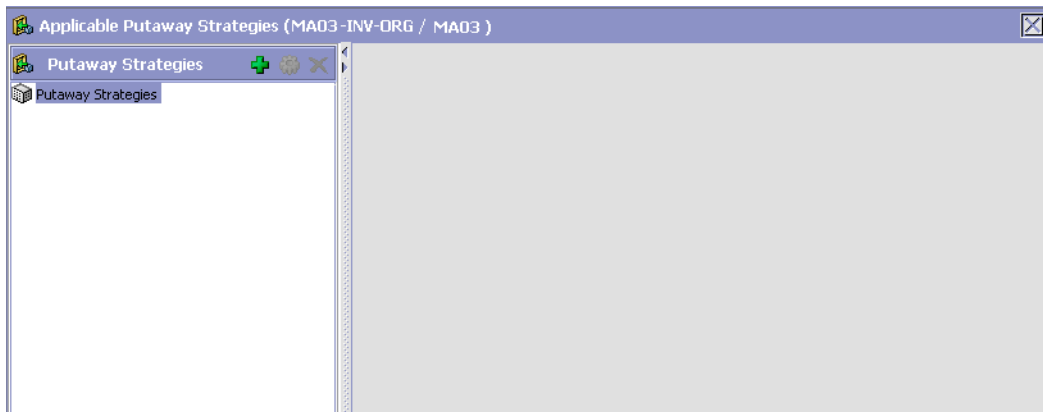
For example, pre-received pallets, when putaway is automatically sorted by shipment, SCAC utilizing the above fields.



### Setting Up Putaway Strategy for Containers with Unknown Contents - Pallets

You can set up putaway strategies to putaway applicable inventory from a source zone to a target zone, based on the strategy specified.

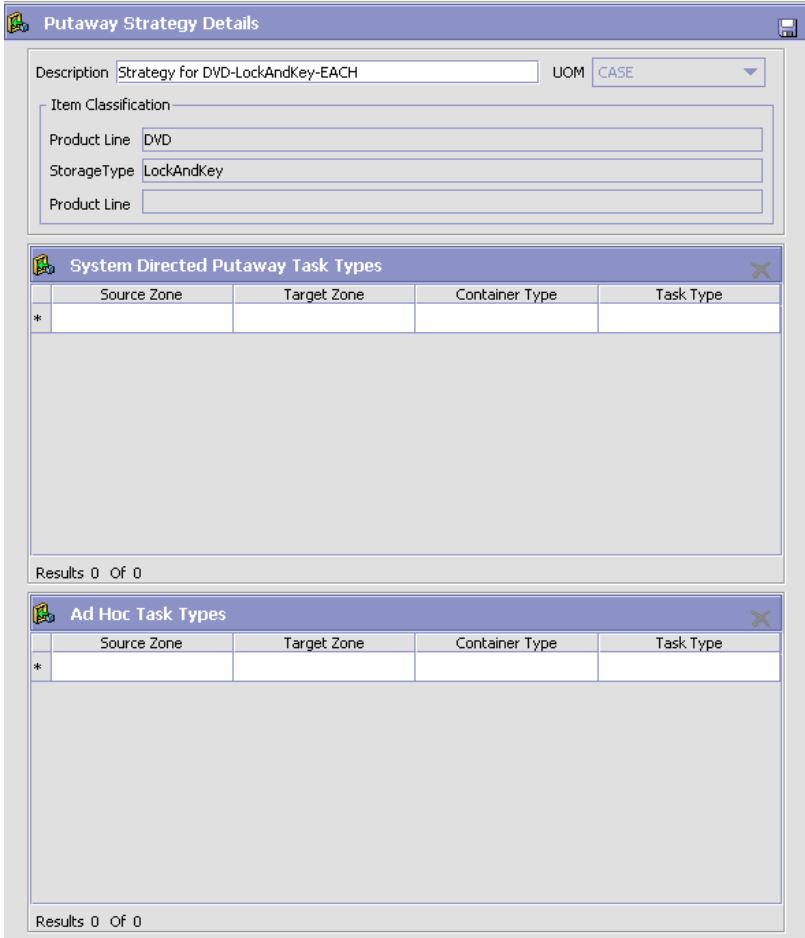
To set up putaway strategy for container with unknown content pallets:

1. In the Putaway Preference Details : Container with unknown contents : Pallet window, choose .
2. The Applicable Putaway Strategies window is displayed.



3. Choose  in the Putaway Strategies panel. The Putaway Strategy Details window appears in the right panel.
4. Enter information in the applicable fields. See the Putaway Strategy Details Window table for field value descriptions.
5. Choose .





**Putaway Strategy Details**

Description: Strategy for DVD-LockAndKey-EACH UOM: CASE

Item Classification

Product Line: DVD

StorageType: LockAndKey

Product Line:

**System Directed Putaway Task Types**

	Source Zone	Target Zone	Container Type	Task Type
*				

Results 0 Of 0

**Ad Hoc Task Types**




	Source Zone	Target Zone	Container Type	Task Type
*				

Results 0 Of 0

**Table 8–20 Putaway Strategy Details Window**

Field	Description
Description	Enter a description for the Putaway Strategy.
UOM	Select the UOM for the Putaway Strategy, if applicable. Note: The UOM will be defaulted in instances where it has been specified in the Putaway Preference Details screen.

**Table 8–20 Putaway Strategy Details Window**

Field	Description
<b>Item Classification</b>	List of putaway item classifications for the Enterprise are displayed. An example, Product Line is shown below.
Product Line	Choose relevant product line item classification for the putaway activity.  Choose  . In the Classification Values window, select the applicable product line classification.
<b>System Directed Putaway Task Types</b>	<b>Displays the list of existing system directed putaway task types.</b>  <b>You may use  to delete an existing system directed putaway task type.</b>
Source Zone	Select the source zone where inventory is available.
Target Zone	Select the target zone where you want to move the inventory.
Container Type	Select the container type to be used to move the inventory from the source zone to the target zone. Typical values are Case and Pallet.
Task Type	Select the Putaway Task Type applicable to this putaway strategy. This field displays the list of existing system directed task types that belong to the 'PUTAWAY' activity group.
<b>Ad hoc Task Types</b>	<b>Displays the list of existing ad hoc task types.</b>  <b>You may use  to delete an existing ad hoc task type.</b>
Source Zone	Select the source zone where inventory is available.
Target Zone	Select the target zone where you want to move the inventory.

**Table 8–20 Putaway Strategy Details Window**

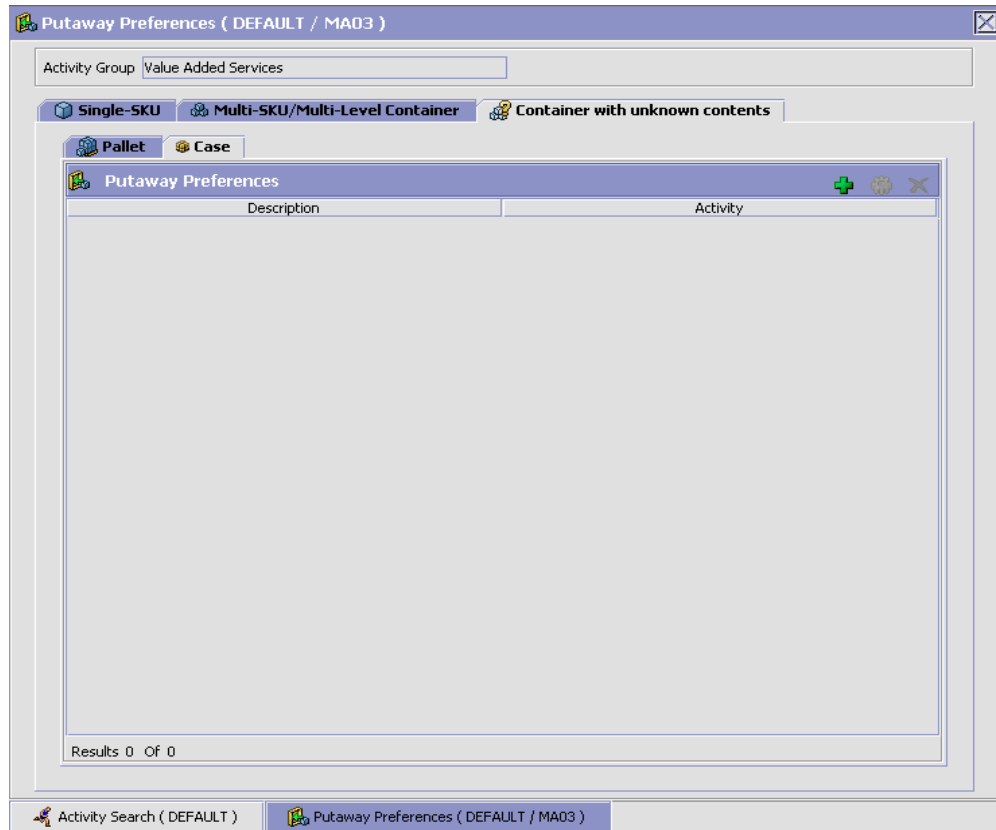
Field	Description
Container Type	Select the container type to be used to move the inventory from the source zone to the target zone. Typical values are Case and Pallet.
Task Type	Select the Putaway Task Type applicable to this putaway strategy. This field displays the list of existing ad hoc task types that belong to the 'PUTAWAY' activity group.



6.

**8.4.3.1.2 Setting Up Putaway Preference for a Case**

To set up putaway preference for a case:

1. In the Container with Unknown Contents tab of Putaway Preferences window, choose the Case tab. The Case tab window is displayed.



2. In the Case tab window, choose .
3. The Putaway Preference Details window appears.
4. Enter information in the applicable fields. Refer [Table 8–21](#) for field value descriptions.
5. Choose .

**Putaway Preference Details ( DEFAULT / MA03 ) : Container with unknown contents : Case**

Activity Group Value Added Services To View Strategy Click here

Description

Activity Code Value Added Service


### Zone Priorities

Priority	Zone	Storage Code
3	ZZ1	To store DVD Writers
*		

Results 1 Of 1

Activity Search ( DEFAULT ) Putaway Preferences ( DEFAULT / M... Putaway Preference Details ( DEFAU...


**Table 8–21 Putaway Preference Details Window - Container with Unknown Contents Case Tab**

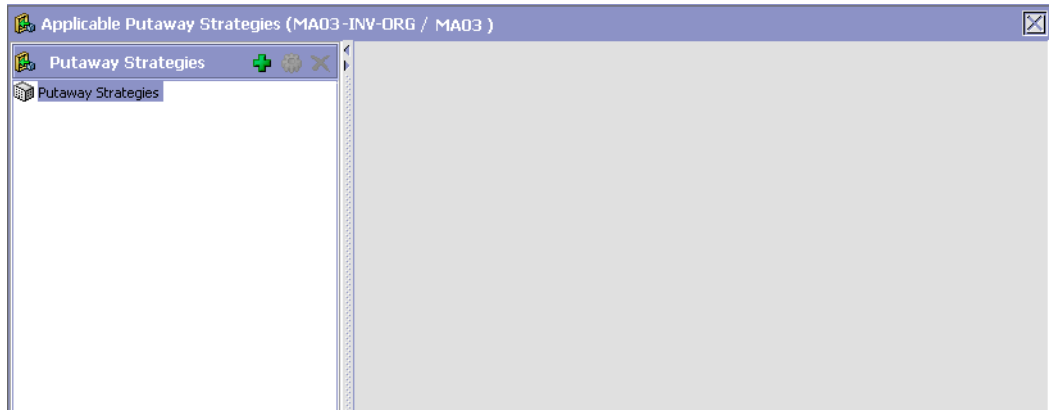
Field	Description
Activity Group	This is automatically populated by the system as 'Value Added Services'.
To View Strategy Click here	<p>Choose  to view or set up Putaway Strategy. For more details on setting up a putaway strategy see <a href="#">Setting Up Putaway Strategy for Containers with Unknown Contents - Cases</a>.</p> <p>Note: Putaway strategy may be specified for the putaway preferences after the preference is saved.</p>
Description	Enter a brief description for the putaway preference.
Activity Code	Choose the Activity Code for the putaway preference. This is a mandatory field.
<b>Zone Priorities</b>	
Priority	<p>Enter a number to represent the priority.</p> <p>The priority is used to sequence the order in which the zone priorities are evaluated. For example, all storage code level priorities are to be evaluated first before generic priorities.</p> <p>The priority needs to be a positive integer, greater than zero. This is mandatory.</p>
Zone	Choose the relevant zone for putaway. This is a mandatory field.
Storage Code	<p>Choose the storage code for the zone, if applicable.</p> <p>This limits the locations being evaluated to the storage code specified. For example, putaway of hazardous items into a zone are restricted to the locations having the appropriate storage code.</p>



### Setting Up Putaway Strategy for Containers with Unknown Contents - Cases

You can set up putaway strategies to putaway applicable inventory from a source zone to a target zone, based on the strategy specified.

To set up putaway strategy for container with unknown content cases:

1. In the Putaway Preference Details : Container with unknown contents : Case window, choose .
2. The Applicable Putaway Strategies window is displayed.



3. Choose  in the Putaway Strategies panel. The Putaway Strategy Details window appears in the right panel.
4. Enter information in the applicable fields. See the Putaway Strategy Details Window table for field value descriptions.
5. Choose .

Putaway Strategy Details

DescriptionStrategy for DVD-LockAndKey-EACHUOMCASE

Item Classification

Product LineDVD

StorageTypeLockAndKey

Product Line

System Directed Putaway Task Types

	Source Zone	Target Zone	Container Type	Task Type
*				

Results 0 Of 0

Ad Hoc Task Types

	Source Zone	Target Zone	Container Type	Task Type
*				




Results 0 Of 0

Table 8–22 Putaway Strategy Details Window

Field	Description
Description	Enter a description for the Putaway Strategy.
UOM	Select the UOM for the Putaway Strategy, if applicable. Note: The UOM will be defaulted in instances where it has been specified in the Putaway Preference Details screen.






**Table 8–22 Putaway Strategy Details Window**

Field	Description
<b>Item Classification</b>	List of putaway item classifications for the Enterprise are displayed. An example, Product Line is shown below.
Product Line	<p>Choose relevant product line item classification for the putaway activity.</p> <p>Choose . In the Classification Values window, select the applicable product line classification.</p>
<b>System Directed Putaway Task Types</b>	<p><b>Displays the list of existing system directed putaway task types.</b></p> <p><b>You may use  to delete an existing system directed putaway task type.</b></p>
Source Zone	Select the source zone where inventory is available.
Target Zone	Select the target zone where you want to move the inventory.
Container Type	Select the container type to be used to move the inventory from the source zone to the target zone. Typical values are Case and Pallet.
Task Type	Select the Putaway Task Type applicable to this putaway strategy. This field displays the list of existing system directed task types that belong to the 'PUTAWAY' activity group.
<b>Ad hoc Task Types</b>	<p><b>Displays the list of existing ad hoc task types.</b></p> <p><b>You may use  to delete an existing ad hoc task type.</b></p>
Source Zone	Select the source zone where inventory is available.
Target Zone	Select the target zone where you want to move the inventory.
Container Type	Select the container type to be used to move the inventory from the source zone to the target zone. Typical values are Case and Pallet.
Task Type	Select the Putaway Task Type applicable to this putaway strategy. This field displays the list of existing ad hoc task types that belong to the 'PUTAWAY' activity group.

6.

### 8.4.3.2 Creating a New Putaway Preference for Container with Unknown Contents from an Existing Putaway Preference


To create a new putaway preference for container with unknown contents from an existing putaway preference:



1. From the tree in the application rules side panel, choose VAS > Activities. The Activity Search window is displayed, with the list of activities.
2. In the top right corner, choose . The Putaway Preferences window is displayed.
3. In the Putaway Preferences window, choose the Container with Unknown Contents tab.
4. The Container with Unknown Contents tab window is displayed, with the list of putaway preferences.
5. Select the putaway preference to be copied from. Choose .
6. The Putaway Preference Details window is displayed.
7. Enter information in the applicable fields. For more information about modifying the fields, refer to [Section 8.4.3.1.1, "Setting Up Putaway Preference for a Pallet"](#) on page 695 and [Section 8.4.3.1.2, "Setting Up Putaway Preference for a Case"](#) on page 701.
8. Choose .

### 8.4.3.3 Modifying a Putaway Preference for Container with Unknown Contents

Once a Putaway Preference for Container with Unknown Contents has been created, it can be modified.

To modify a putaway preference for container with unknown contents:



1. From the tree in the application rules side panel, choose VAS > Activities. The Activity Search window is displayed, with the list of activities.
2. In the top right corner, choose . The Putaway Preferences window is displayed.

3. In the Putaway Preferences window, choose the Container with Unknown Contents tab.
4. The Container with Unknown Contents tab window is displayed, with the list of putaway preferences.
5. Select the putaway preference to be modified. Choose .
6. The Putaway Preference Details window is displayed.
7. Enter information in the applicable fields. For more information about modifying the fields, refer to [Section 8.4.3.1.1, "Setting Up Putaway Preference for a Pallet"](#) on page 695 and [Section 8.4.3.1.2, "Setting Up Putaway Preference for a Case"](#) on page 701.
8. Choose .

*The activity code corresponding to the preference cannot be modified. The preference must be deleted and recreated. Refer to [Section 8.4.3.4, "Deleting a Putaway Preference for Container with Unknown Contents"](#) on page 709.*

#### 8.4.3.4 Deleting a Putaway Preference for Container with Unknown Contents

To delete a putaway preference for container with unknown contents:

1. From the tree in the application rules side panel, choose VAS > Activities. The Activity Search window is displayed, with the list of activities.
2. In the top right corner, choose . The Putaway Preferences window is displayed.
3. In the Putaway Preferences window, choose the Container with Unknown Contents tab.
4. The Container with Unknown Contents tab window is displayed, with the list of putaway preferences.
5. Select the putaway preference to be deleted.
6. Choose .

## 8.5 Defining Work Order Cancellation Reasons

A reason code is associated with cancellation of work order requests.

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**Note:** Viewing of Work Order Cancellation Reason Code is available only for Enterprise and Node users.

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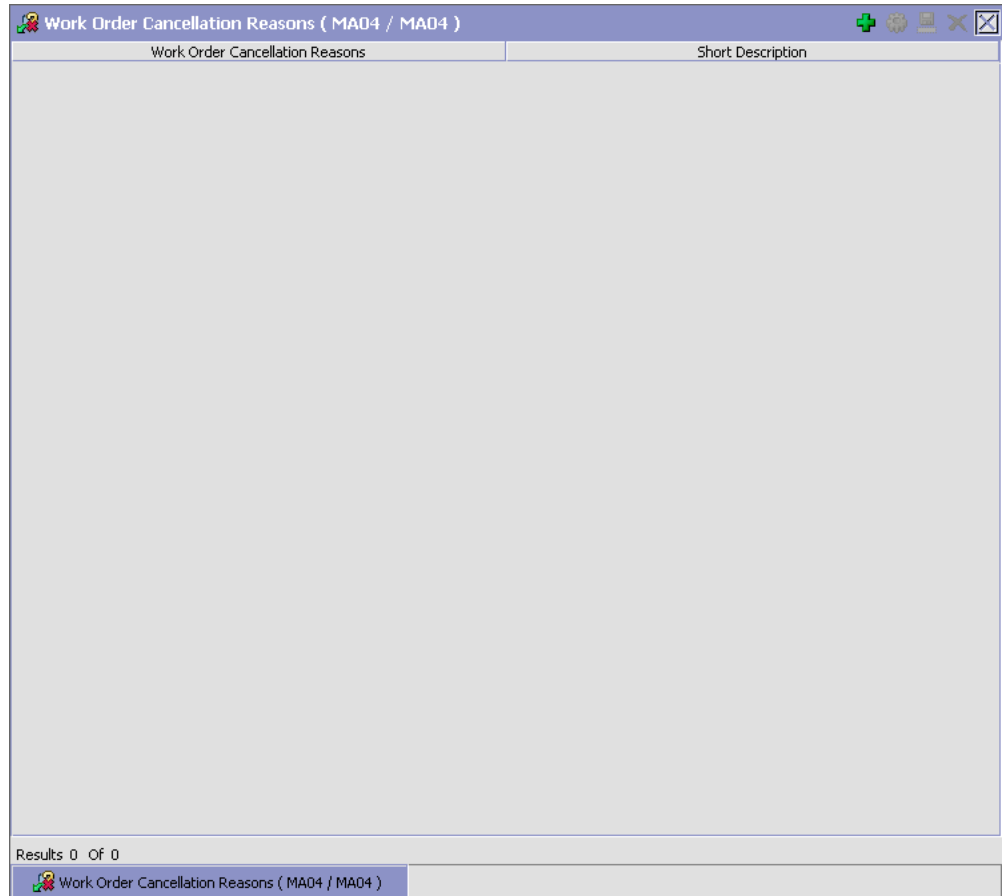
Use Work Order Cancellation Reasons for:



- [Creating a Work Order Cancellation Reason](#)
- [Creating a New Work Order Cancellation Reason from an Existing Work Order Cancellation Reason](#)
- [Modifying a Work Order Cancellation Reason](#)
- [Deleting a Work Order Cancellation Reason](#)

### 8.5.1 Creating a Work Order Cancellation Reason

To create a work order cancellation reason:

1. From the tree in the application rules side panel, choose VAS > VAS Process > Work Order Cancellation Reasons. The Work Order Cancellation Reasons window is displayed.



2. In the Work Order Cancellation Reasons window, choose .
3. The Work Order Cancellation Reason Code Details pop-up window appears.
4. Enter information in the applicable fields. Refer [Table 8–23](#) for field value descriptions.
5. Choose .


The screenshot shows a software window titled 'Yantra 7x Configurator' with a subtitle 'Work Order Cancellation Reasons Details'. Inside the window, there are three text input fields arranged vertically. The first field is labeled 'Work Order Cancellation Reasons', the second is labeled 'Short Description', and the third is labeled 'Long Description'.


**Table 8–23 Work Order Cancellation Reason Code Details Pop-up Window**

Field	Description
Work Order Cancellation Reasons	Enter a code for the work order cancellation reason.
Short Description	Enter a short description for the work order cancellation reason code.
Long Description	Enter a long description for the work order cancellation reason code.

### 8.5.2 Creating a New Work Order Cancellation Reason from an Existing Work Order Cancellation Reason

To create a new Work Order Cancellation Reason from an existing Work Order Cancellation Reason:



1. From the tree in the application rules side panel, choose VAS > VAS Process > Work Order Cancellation Reasons. The Work Order Cancellation Reasons window is displayed with the list of Work Order Cancellation Reason Codes.
2. Choose the Work Order Cancellation Reason to be copied.
3. Choose . The Work Order Cancellation Reason Code Details pop-up window appears.

4. Enter information in the applicable fields. Refer [Table 8–23](#) for field value descriptions.
5. Choose .

### 8.5.3 Modifying a Work Order Cancellation Reason


Once a Work Order Cancellation Reason has been created, it can be modified.

To modify a Work Order Cancellation Reason:

1. From the tree in the application rules side panel, choose VAS > VAS Process > Work Order Cancellation Reasons. The Work Order Cancellation Reasons window is displayed with the list of Work Order Cancellation Reason Codes.
2. Choose the Work Order Cancellation Reason to be modified.
3. Choose . The Work Order Cancellation Reason Code Details pop-up window appears.
4. Enter information in the applicable fields. Refer [Table 8–23](#) for field value descriptions.
5. Choose .

### 8.5.4 Deleting a Work Order Cancellation Reason

To delete a Work Order Cancellation Reason Code:

1. From the tree in the application rules side panel, choose VAS > VAS Process > Work Order Cancellation Reasons. The Work Order Cancellation Reasons window is displayed with the list of Work Order Cancellation Reason Codes.
2. Choose the Work Order Cancellation Reason to be deleted.
3. Choose .

## 8.6 Defining Allocation Considerations

A work order for service items belonging to one of the following service item group codes would result in inventory transformations on confirmation:

- KIT - Kitting
- DKIT - De-kitting
- COMPL - Compliance
- INVC Inventory-Change

The Allocation Considerations configuration is used by Yantra 7x to provide visibility into such inventory transformations. For instance:

- When a work order is created, demand is placed against the original inventory (the one being consumed), and supply is increased for the new inventory (the one being created).

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**Note:** The supply being increased is not an onhand supply. It is an indicative supply that would be available in future.

The demands being increased are not promised demands.

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- When a work order is allocated, the demands placed are modified to indicate that the demands are promised. The supplies may also be modified to indicate their increased chance of arrival.

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**Note:** These demands and supplies could be utilized to assess the availability of inventory.

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- When a work order is confirmed, the supply for the original inventory is removed and supply for the new inventory is created.

Use Allocation Considerations for:

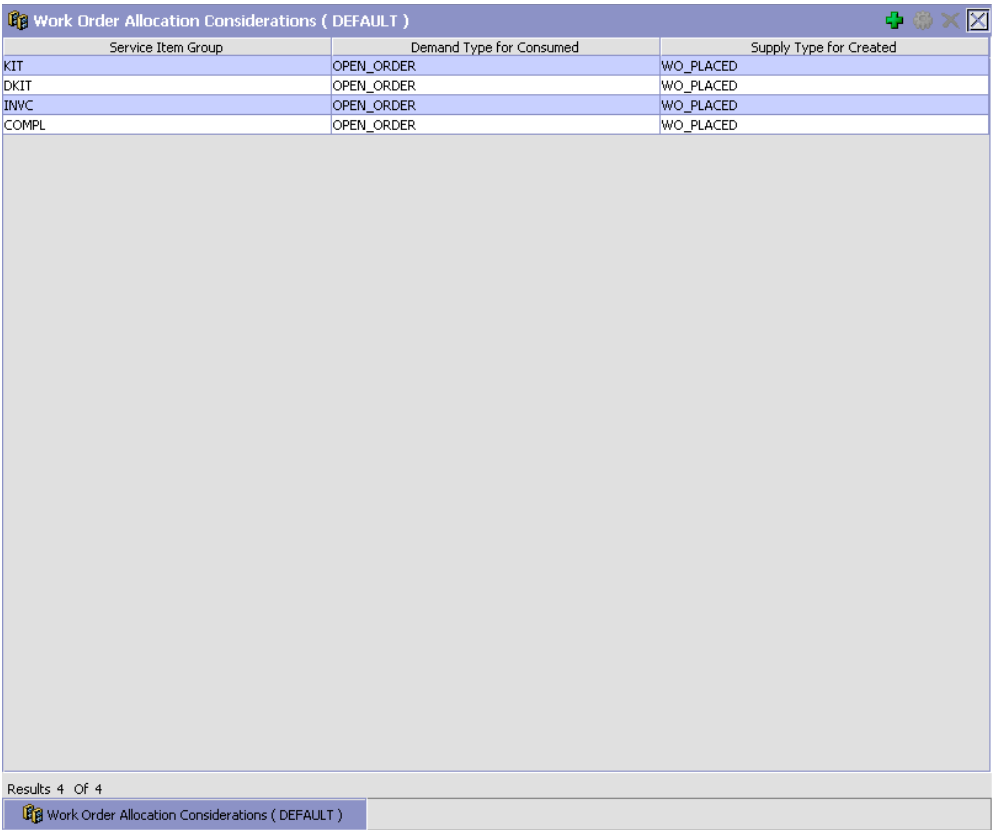
- [Creating a Work Order Allocation Consideration](#)
- [Modifying a Work Order Allocation Consideration](#)
- [Deleting a Work Order Allocation Consideration](#)



### 8.6.1 Creating a Work Order Allocation Consideration



To create a work order allocation consideration:

1. From the tree in the application rules side panel, choose VAS > VAS Process > Allocation Considerations. The Work Order Allocation Considerations window is displayed.



Service Item Group	Demand Type for Consumed	Supply Type for Created
KIT	OPEN_ORDER	WO_PLACED
DKIT	OPEN_ORDER	WO_PLACED
INVC	OPEN_ORDER	WO_PLACED
COMPL	OPEN_ORDER	WO_PLACED

Results 4 Of 4

2. In the Work Order Allocation Considerations window, choose . The Work Order Allocation Consideration pop-up window is displayed.
3. Enter information in the applicable fields. Refer [Table 8–24](#) for field value descriptions.
4. Choose .



**Table 8–24 Work Order Allocation Consideration Pop-up Window**

Field	Description
Service Item Group	Choose the service item group for which the allocation considerations are being created.
Demand Type for Consumed	Associate the type of demand to identify inventory consumed to work orders for the service item group.
Supply Type for Created	Associate the type of supply to identify inventory created by the work order for the service item group.
Demand Type for Allocated	Associate the type of demand to identify inventory allocated to work orders for the service item group.
Supply Type for Allocated	Associate the type of supply to identify inventory allocated by the work order for the service item group.
Actual Supply Type for Consumed	Choose the supply type for inventory consumed at the confirmation.  This field is used when the work order is placed for a Node that is not "Integrated WMS".
Actual Supply Type for Created	Choose the Supply Type for inventory created at the confirmation.  This field is used when the work order is placed for a Node that is not "Integrated WMS".

### 8.6.2 Modifying a Work Order Allocation Consideration


Once a work order allocation consideration has been created, it can be modified.

To modify a work order allocation consideration:

1. From the tree in the application rules side panel, choose VAS > VAS Process > Allocation Considerations. The Work Order Allocation Considerations window is displayed with the list of Work Order Allocation Considerations.
2. Choose the Work Order Allocation Consideration to be modified.
3. Choose . The Work Order Allocation Consideration pop-up window appears.
4. Enter information in the applicable fields. Refer [Table 8–24](#) for field value descriptions.
5. Choose .

### 8.6.3 Deleting a Work Order Allocation Consideration

To delete a work order allocation consideration:

1. From the tree in the application rules side panel, choose VAS > VAS Process > Allocation Considerations. The Work Order Allocation Considerations window is displayed with the list of Work Order Allocation Considerations.
2. Choose the Work Order Allocation Consideration to be deleted.
3. Choose .

## 8.7 Defining Value Added Services Modification Rules




Most order document types flow through a pipeline without requiring any intervention by a customer service representative. However, there are times when modifications are required, such as modifying quantity or activities required. Yantra 7x supports modifications through the Yantra 7x Application Consoles and APIs. It is critical to decide which modifications are allowed for each modification type, modification level, and status combination.

**Important:** Contemplate business and system integration implications before allowing a modification that is disallowed as part of the system defaults.

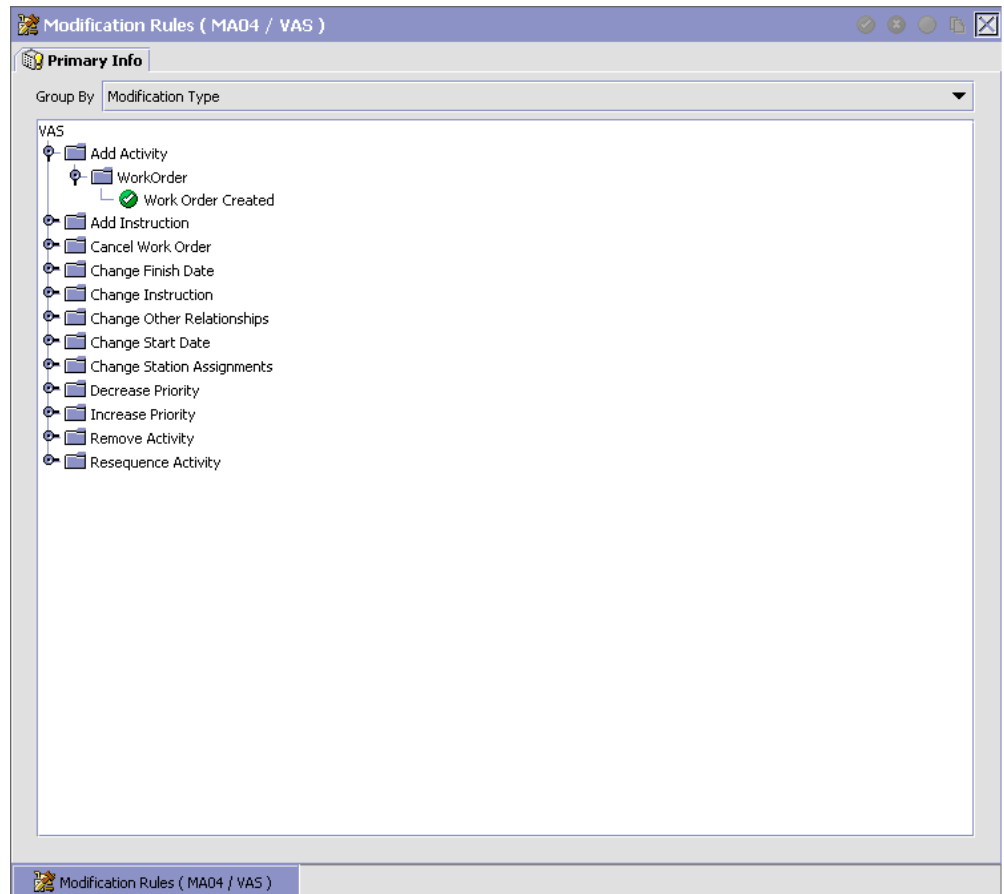
For more information about modification rules, see *Yantra 7x Distributed Order Management Configuration Guide*.

### 8.7.1 Setting Up Value Added Services Modification Rules

To set up Value Added Services modification rules:

1. From the tree in the application rules side panel, choose VAS > VAS Process > VAS Modification Rules. The Modification Rules window is displayed.
2. In the Modification Rules window, select the Value Added Services Process whose Modification Rule is to be set. Refer [Table 8–25](#) for field value descriptions.
3. Choose  to allow modification.
4. Choose  to disallow modification.
5. Choose  to ignore modification.

For more information about defining modification rules, see *Yantra 7x Distributed Order Management Configuration Guide*.



**Table 8–25** *Modification Rules Window*

Field	Description
<b>Primary Info</b>	
Group by	View the VAS Modification Rules grouped by Modification Type, Modification Level, or by Status.
Modification Type	<b>VAS Modification Rules grouped by Modification Type. Statuses are displayed grouped by Modification Level for each Modification Type.</b>

*Table 8–25 Modification Rules Window*

Field	Description
Add Activity	Allow or Disallow or Ignore the addition of an activity appropriately.
Add Instruction	Allow or Disallow or Ignore the addition of an instruction appropriately.
Cancel Work Order	Allow or Disallow or Ignore the cancellation of a work order appropriately.
Change Finish Date	Allow or Disallow or Ignore the modification of a finish date appropriately.
Change Instruction	Allow or Disallow or Ignore the modification of an instruction appropriately.
Change Other Relationships	Allow or Disallow or Ignore the modification of other relationships appropriately.
Change Start Date	Allow or Disallow or Ignore the modification of a start date appropriately.
Change Station Assignments	Allow or Disallow or Ignore the modification of station assignments appropriately.
Decrease Priority	Allow or Disallow or Ignore the decrease in priority appropriately.
Increase Priority	Allow or Disallow or Ignore the increase in priority appropriately.
Remove Activity	Allow or Disallow or Ignore the removal of an activity appropriately.
Resequence Activity	Allow or Disallow or Ignore the resequencing of an activity appropriately.
Modification Level	<b>VAS Modification Rules grouped by Modification Level. Statuses are displayed grouped by Modification Type for each Modification Level.</b>
Activity	Allow or Disallow or Ignore the modification types at the activity level appropriately.
Work Order	Allow or Disallow or Ignore the modification types at the work order level appropriately.

**Table 8–25** *Modification Rules Window*

Field	Description
Status	<b>VAS Modification Rules grouped by Status. Modification Types are displayed grouped by Modification Level for each Status.</b>
Work Order Created	Allow or Disallow or Ignore the modification types for the Work Order Created status appropriately.

For more information about the Allow, Disallow, and Ignore features, see *Yantra 7x Distributed Order Management Configuration Guide*.

## 8.8 Defining Value-Added Services Hold Types

Work orders can be placed on hold manually or automatically, by applying a particular hold type. Certain transactions can be configured to not process documents that are on a given hold. Likewise, modification types can be configured to not process documents that are on a given hold. By default, all transactions and modification types are allowed to process all documents for all hold types.

The transactions that can be prevented from processing work orders on a given hold type have the check box `This Transaction Can Be Stopped From Processing Work Orders That Are On Hold` checked in the `Others` tab of the transaction details. For more information about viewing transaction details, refer to the *Yantra 7x Platform Configuration Guide*.



You can use the Hold Types branch for:

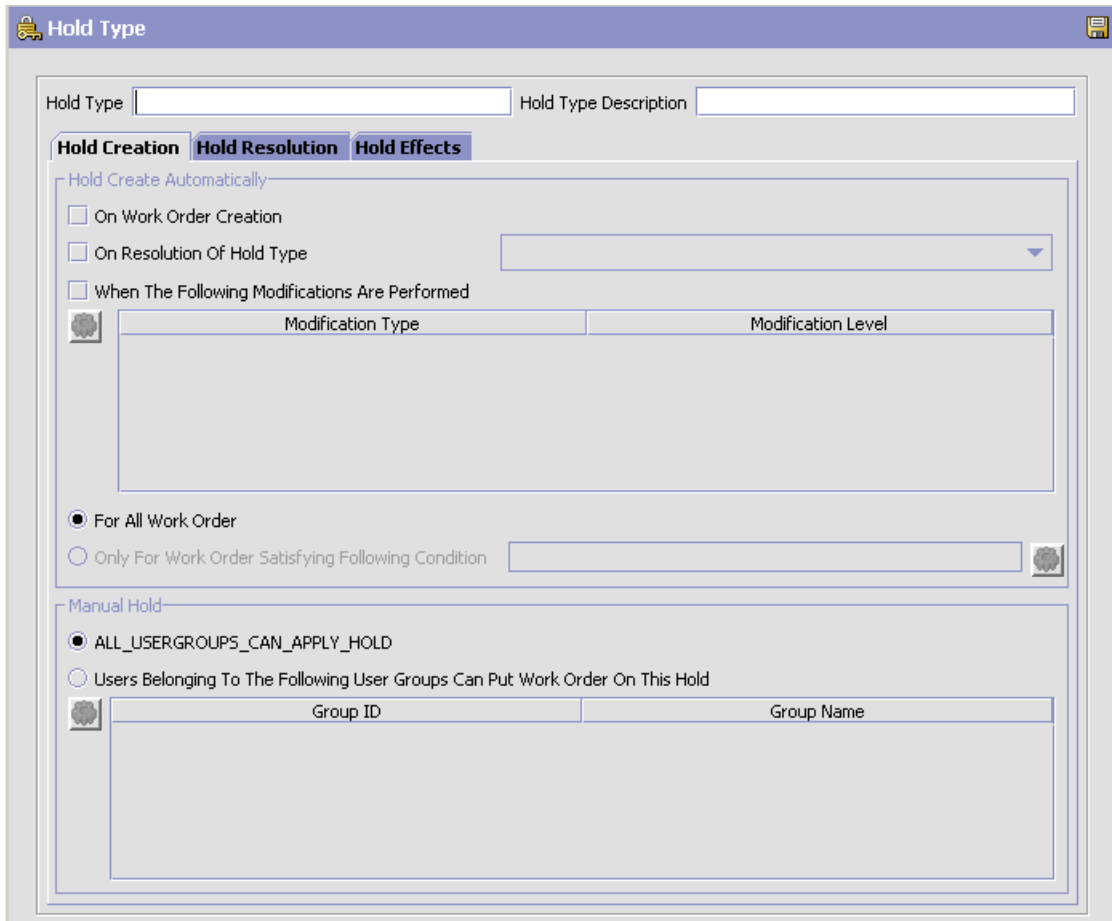
- [Creating a Hold Type](#)
- [Modifying a Hold Type](#)
- [Deleting a Hold Type](#)

### 8.8.1 Creating a Hold Type

To create a hold type:

1. From the tree in the application rules side panel, choose `VAS > VAS Process > Hold Types`. The Hold Types window is displayed in the work area.



2. Click . The Hold Type pop-up window appears. The type of this hold in the Hold Type field, and its description in the Description field. Enter the rest of the information in the applicable fields. Refer to [Table 8–26](#), [Table 8–27](#) and [Table 8–28](#) for field value descriptions.
3. Click .




The image shows a software window titled "Hold Type" with a standard Windows-style title bar. Inside the window, there are two input fields at the top: "Hold Type" and "Hold Type Description". Below these are three tabs: "Hold Creation", "Hold Resolution", and "Hold Effects". The "Hold Creation" tab is currently selected. Under this tab, there is a section titled "Hold Create Automatically" which contains three checkboxes: "On Work Order Creation", "On Resolution Of Hold Type", and "When The Following Modifications Are Performed". The "On Resolution Of Hold Type" checkbox is followed by a dropdown menu. Below these checkboxes is a table with two columns: "Modification Type" and "Modification Level". Below the table are two radio buttons: "For All Work Order" (which is selected) and "Only For Work Order Satisfying Following Condition". The "Only For Work Order Satisfying Following Condition" radio button is followed by a text input field and a small icon. Below this is a section titled "Manual Hold" which contains two radio buttons: "ALL\_USERGROUPS\_CAN\_APPLY\_HOLD" (which is selected) and "Users Belonging To The Following User Groups Can Put Work Order On This Hold". The "Users Belonging To The Following User Groups Can Put Work Order On This Hold" radio button is followed by a table with two columns: "Group ID" and "Group Name".



**Table 8–26 Hold Type window, Hold Creation tab**

Field	Description
<b>Hold Created Automatically</b>	
On Work Order Creation	Check this to apply this hold type to all work orders on work order creation.
On Resolution Of Hold Type	Check this to apply this hold type on resolution of another hold type. Select from the drop-down list the hold type that, upon resolution, will trigger this hold type.
When The Following Modifications Are Performed	<p>Modification types that automatically apply this hold type to a work order.</p> <p>Click  to modify the list. In the subsequent pop-up window:</p> <ul style="list-style-type: none"> <li>• Use the right arrow to move the available modification types that you wish to associate with this hold type to the subscribed list.</li> <li>• Use the left arrow to unsubscribe the modification types that you wish to disassociate with this hold type and move them back into the available list.</li> </ul>
For All Work Orders	Select this radio button if the above conditions should be checked for all work orders.
Only For Work Order Satisfying Following Condition	Select this radio button if the above conditions should only be checked for work orders satisfying a certain condition. Click  to build or modify the condition that will be evaluated. For more information on using the condition builder, refer to the <i>Yantra 7x Platform Configuration Guide</i> .
<b>Manual Hold</b>	


**Table 8–26 Hold Type window, Hold Creation tab**

Field	Description
All User Groups Can Apply Hold	Select this radio button if all user groups can apply this hold to a work order.
Users Belonging To The Following User Groups Can Put Work Orders On This Hold	<p>Select this radio button if only users belonging to certain user groups may apply this hold to a work order.</p> <p>Click  to modify the list. In the subsequent pop-up window:</p> <ul style="list-style-type: none"> <li>Use the right arrow to move the available user groups that you wish to associate with this hold type to the subscribed list.</li> <li>Use the left arrow to unsubscribe the user groups that you wish to disassociate with this hold type and move them back into the available list.</li> </ul>



**Table 8–27 Hold Type window, Hold Resolution tab**

Field	Description
<b>Hold Resolved Automatically</b>	
The Following Time-Triggered Transaction Will Process Created Holds	From the drop-down list, select the time-triggered transaction that will process created holds.
The Following Time-Triggered Transaction Will Process Rejected Holds	From the drop-down list, select the time-triggered transaction that will process rejected holds.
<b>Hold Resolved Manually</b>	



**Table 8–27 Hold Type window, Hold Resolution tab**

Field	Description
All Users Can Process This Hold	Select this radio button if all user groups may process this hold.
Users Belonging To The Following User Groups Can Process This Hold	<p>Select this radio button if only users belonging to certain user groups may process this hold.</p> <p>Click  to modify the list. In the subsequent pop-up window:</p> <ul style="list-style-type: none"> <li>Use the right arrow to move the available user groups that you wish to associate with this hold type to the subscribed list.</li> <li>Use the left arrow to unsubscribe the user groups that you wish to disassociate with this hold type and move them back into the available list.</li> </ul>


**Table 8–28 Hold Type window, Hold Effects tab**

Fields	Description
Transactions That Will Be Stopped From Processing Work Orders On This Hold	<p>Transactions that are disallowed when this hold type is applied to a work order.</p> <p>Click  to modify the list. In the subsequent pop-up window:</p> <ul style="list-style-type: none"> <li>Use the right arrow to move the available modification types that you wish to associate with this hold type to the subscribed list.</li> </ul> <p>Use the left arrow to unsubscribe the modification types that you wish to disassociate with this hold type and move them back into the available list.</p>
The Following Modifications Are Not Allowed For Work Orders On This Hold	<p>Modification types are disallowed when this hold type is applied to a work order.</p> <p>Click  to modify the list. In the subsequent pop-up window:</p> <ul style="list-style-type: none"> <li>Use the right arrow to move the available transactions that you wish to associate with this hold type to the subscribed list.</li> </ul> <p>Use the left arrow to unsubscribe transactions that you wish to disassociate with this hold type and move them back into the available list.</p>

### 8.8.2 Modifying a Hold Type

1. From the tree in the application rules side panel, choose VAS > VAS Process > Hold Types. The Hold Types window is displayed in the work area.
2. Select the applicable hold type and click . The Hold Type pop-up window appears. Enter information in the applicable fields. Refer to [Table 8–26](#), [Table 8–27](#) and [Table 8–28](#) for field value descriptions.
3. Click .

### 8.8.3 Deleting a Hold Type

1. From the tree in the application rules side panel, choose VAS > VAS Process > Hold Types. The Hold Types window is displayed in the work area.
2. Select the applicable hold type and click .

## 8.9 Defining Value Added Services Process Type Details

Value Added Services Process Type Details define parameters and templates that distinguish a process type.

A **process type pipeline** is a series of transactions and statuses that guide document types, such as a Value Added Services execution, through a predefined process. A pipeline consists of the different statuses a document goes through during fulfillment, negotiation, shipment, or receipt. You can also set up transactions consisting of events, actions, and conditions, as they pertain to the pipeline you are configuring.

### Repositories

A repository is a logical collection of entities that define the business process workflow.

The following entities are included in a repository:

- Pipelines
- Transactions
- Statuses

- Conditions
- Actions
- Services

Yantra 7x provides a base repository for each of the system defined process types. Some of the entities within a repository are copied when creating a new document type. For more information about creating a new document type, see the *Yantra 7x Platform Configuration Guide*.

For more information about defining process type details, see *Yantra 7x Platform Configuration Guide*.

### 8.9.1 Viewing Value Added Services Process Type Details

To view Value Added Services process type details:

1. From the tree in the application rules side panel, choose VAS > VAS Process > VAS Process Type Details. The Process Type Details : Work Order window is displayed.
2. Primary information of the Process Type is displayed in the applicable fields. Refer [Table 8–29](#) for field value descriptions.

For more information about defining the primary information for process type details, see *Yantra 7x Platform Configuration Guide*.

Process Type Details : Work Order ( DEFAULT )

Primary Info

Process Type

VAS

Process Type Name

VAS

Description

VAS

Table 8–29 Process Type Details : Work Order Window

Field	Description
Primary Info	
Process Type	This is automatically populated by the system as "VAS".
Process Type Name	This indicates the name of the process type.
Description	This provides a brief description for the process type.

## 8.10 Defining Value Added Services Process Model

The Value Added Services process is modeled through a pipeline. This represents the process configuration that is unique to a warehouse. A warehouse may also specify unique processes for each participating enterprise.

For example, a warehouse that performs ticketing for outbound shipments after pick and pack into a carton is complete.

### 8.10.1 Pipeline Determination

**Pipeline determination** is used to set up conditions that affect which pipeline is used during the start of the business process workflow. For example, an organization deals with sales orders that sometimes contain hazardous materials. They have two separate pipelines, one in which orders with order lines without any hazardous materials go through and one in which orders with order lines containing hazardous materials must go through for inspection before continuing through the order process. The organization uses pipeline determination to set up a condition that determines whether or not order lines contain hazardous materials and sends the order line down the correct pipeline.

For more information about Pipeline Determination, see *Yantra 7x Platform Configuration Guide*.

### 8.10.2 Hub Rule

When you expand the Pipeline Determination branch, the components displayed depends on what role you are logged in as. If you are logged in as a Hub role, the Hub Rule is displayed. If you are logged in as an Enterprise role, both the Hub Rule and all user created determination rules (For example, My Rule) components are displayed. Double-click on the applicable rule to display the pipeline determination rules.

---

**Note:** If you are logged in as an Enterprise role, the Hub Rule screen is grayed out and cannot be modified.

---

Drag conditions and pipelines into the work area to construct pipeline determination rules. A single pipeline or condition must be the root.

Conditions cannot link back to an earlier component in the chain and a pipeline cannot be linked to twice.

**Note:** When configuring pipeline determination for an order document type pipeline, please note that pipeline determination is only considered when adding a line or creating an order. When changes are made to draft orders pipeline determination does not occur.

### 8.10.2.1 Condition Variables for Pipeline Determination

When using conditions for pipeline determination, the following condition variables can be used:

- Enterprise Code
- Provider Organization Code
- Node Key
- Purpose
- Service Item Group Code
- Service Item ID
- Segment Type
- Segment
- Has Components
- Status
- Pre Call Status
- Appt Status
- Number Of Attempts
- Number Of Hours until Appointment
- Number Of Hours After Appointment
- Number Of Hours After Last Execution
- Last Execution Success
- Open Work Order Flag



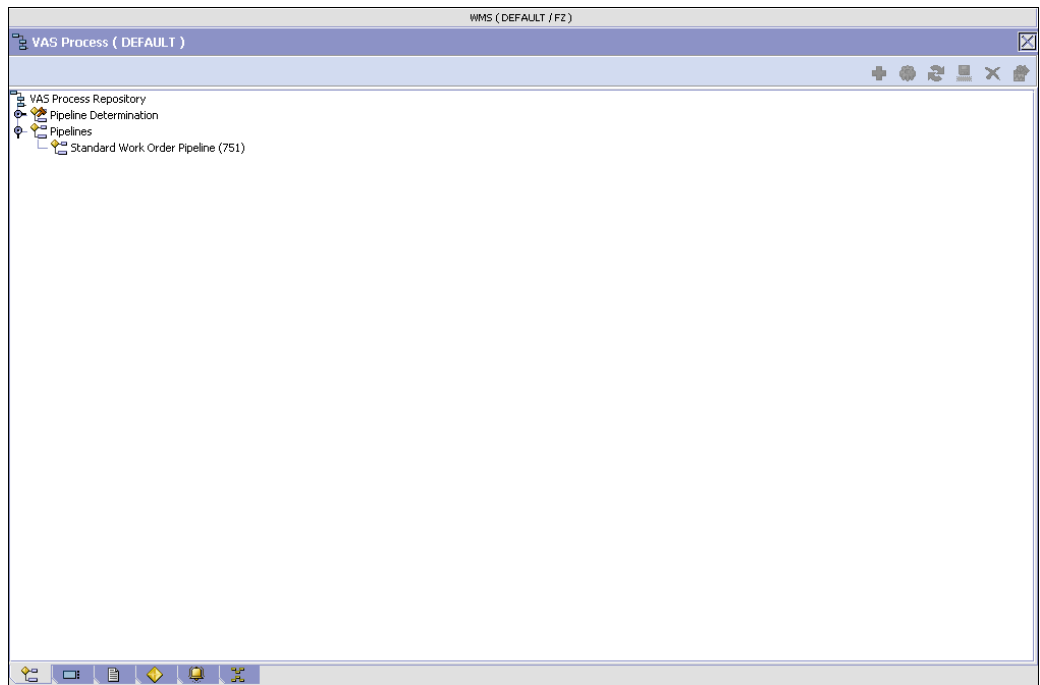
For more information about Pipeline Determination and Hub Rule, see *Yantra 7x Platform Configuration Guide*.

### 8.10.3 Pipelines

For more information about Pipelines, see *Yantra 7x Platform Configuration Guide*.

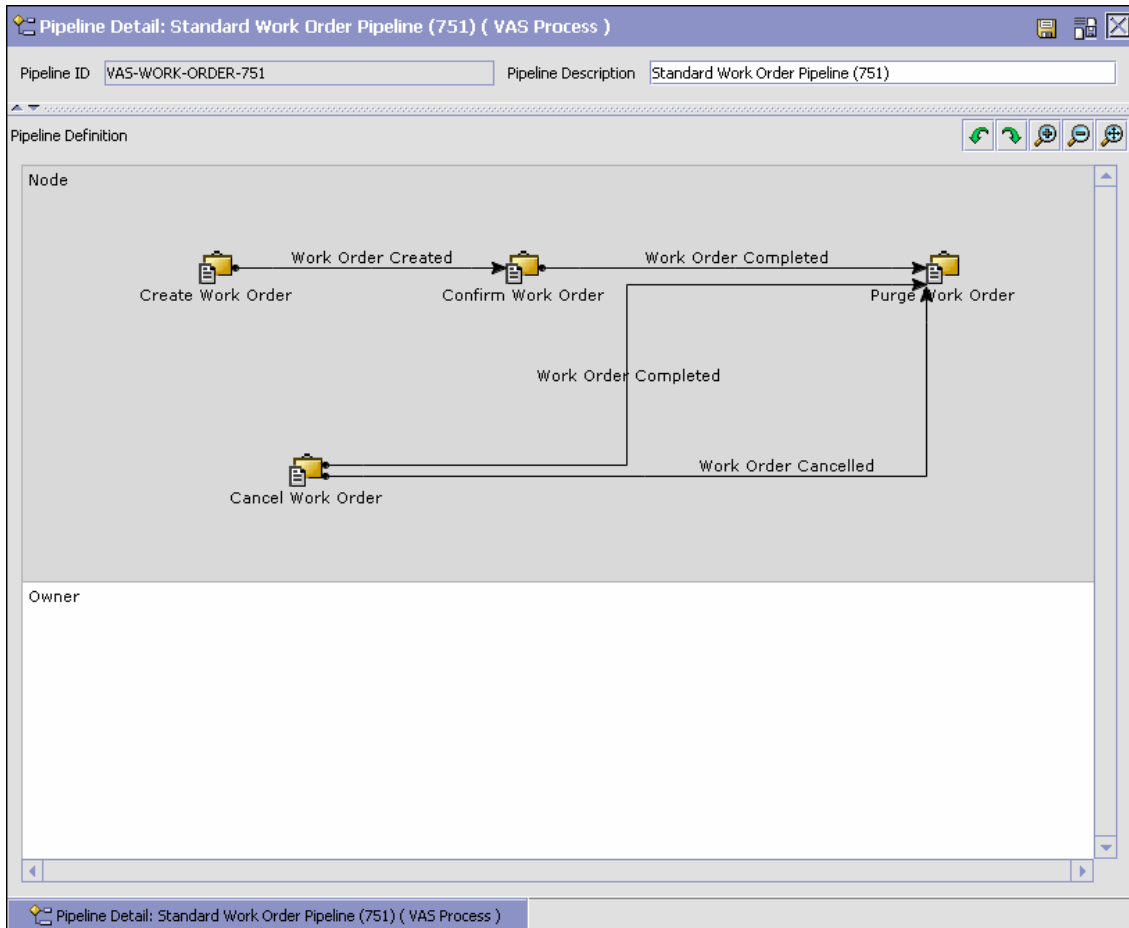
To view the Value Added Services pipeline details:

1. From the tree in the application rules side panel, choose VAS > VAS Process > VAS Process Model. The VAS Process window is displayed.



2. In the VAS Process window, choose VAS Process Repository > Pipelines > Standard Work Order Pipeline.
3. The Pipeline Detail: Standard Work Order Pipeline (VAS Process) window is displayed.

For more information about creating or modifying a pipeline, see the *Yantra 7x Platform Configuration Guide*.




### 8.10.4 Transactions

Every process type has a set of base transactions defined for it. A transaction is a logical unit of work that is necessary for performing activity within Yantra 7x. Base transactions are predefined transactions that contain information about how the transaction behaves, such as how many copies of a transaction can be kept in a process type and whether

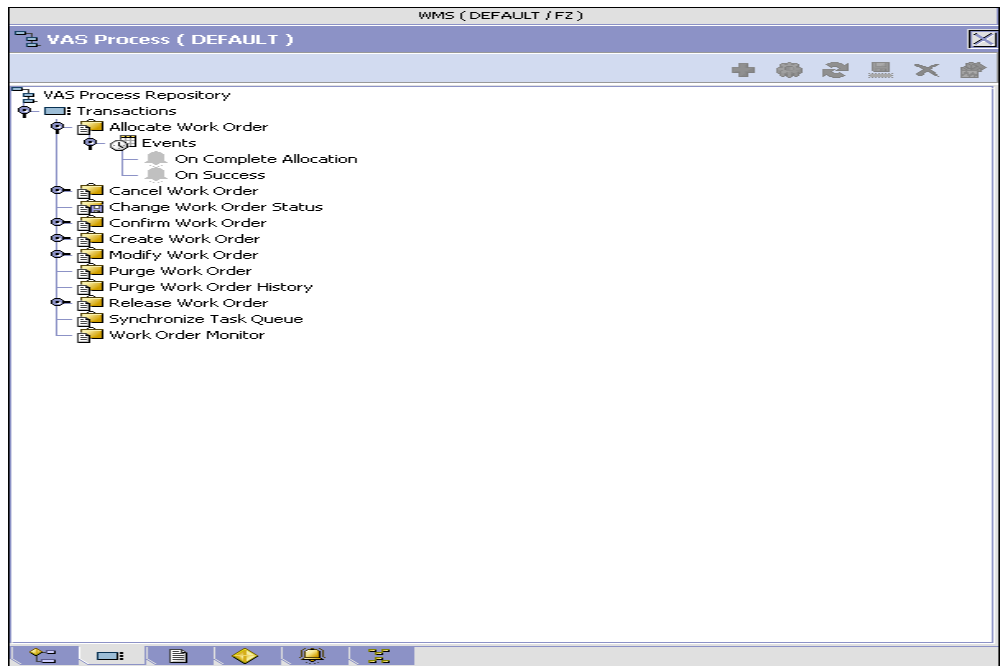
or not it can have configurable base pick and drop statuses. Base transactions can be used to create new transactions. These transactions can be changed within the limits defined in the base transaction.

For more information about Transactions, see *Yantra 7x Platform Configuration Guide*.

To view the transaction details for a Value Added Services pipeline:

1. From the tree in the application rules side panel, choose VAS > VAS Process > VAS Process Model. The Work Order VAS window is displayed.
2. In the Work Order VAS window, choose .
3. The Transactions tab window is displayed.

For more information about creating or modifying Transactions, see *Yantra 7x Platform Configuration Guide*.



**Table 8–30 Work Order VAS Pipeline - Transactions Tab Window**


Field	Description
Allocate Work Order	This transaction represents allocation of the work order for the VAS process.
Cancel Work Order	This transaction represents the cancellation of a work order created for VAS.
Change Work Order Status	This transaction represents the change in status of a work order created for VAS.
Confirm Work Order	This transaction represents that the work order needs to be confirmed for VAS.
Create Work Order	This transaction represents creation of a work order for VAS.
Modify Work Order	This transaction represents the modification of a work order for VAS.
Purge Work Order History	This transaction represents the purge of the work order history for VAS.
Purge Work Order	This transaction represents the purge of work orders created for VAS.
Release Work Order	This transaction represents the release of work orders created for VAS.

### 8.10.5 Statuses

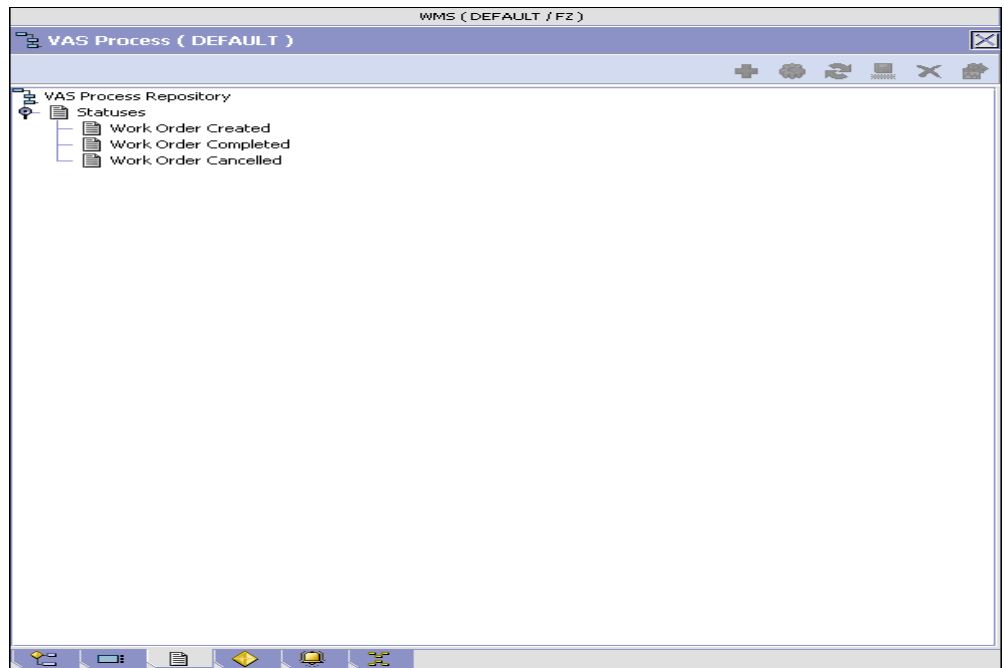
**Statuses** are the actual states that a document moves through in the pipeline. A transaction can contain two types of statuses, a drop status and a pickup status. A document is moved into a **drop status** when the events and conditions of a transaction have been completed. A **pickup status** takes the document from the previous drop status and moves it through the next transaction. Created and Scheduled are examples of statuses.

For more information about Statuses, see *Yantra 7x Platform Configuration Guide*.

To view the status details of a VAS pipeline:

1. From the tree in the application rules side panel, choose VAS > VAS Process > VAS Process Model. The Work Order VAS window is displayed.
2. In the Work Order VAS window, choose .
3. The Statuses tab window is displayed.

For more information about creating or modifying Statuses, see *Yantra 7x Platform Configuration Guide*.



**Table 8–31 Work Order VAS Pipeline - Statuses Tab Window**


Field	Description
Work Order Created	This indicates that a work order is created. This corresponds to the first step of the 'Create Work Order' transaction.
Work Order Confirmed	This indicates all activities required for the work order is complete. This corresponds to the 'Confirm Work Order' transaction. This transaction creates inventory for the parent item on the work order. Putaway process for the finished inventory to storage or to packing or shipping zones can be initiated.
Work Order Canceled	This indicates cancellation of VAS for the shipment. This corresponds to the 'Cancel Work Order' transaction.

### 8.10.6 Conditions

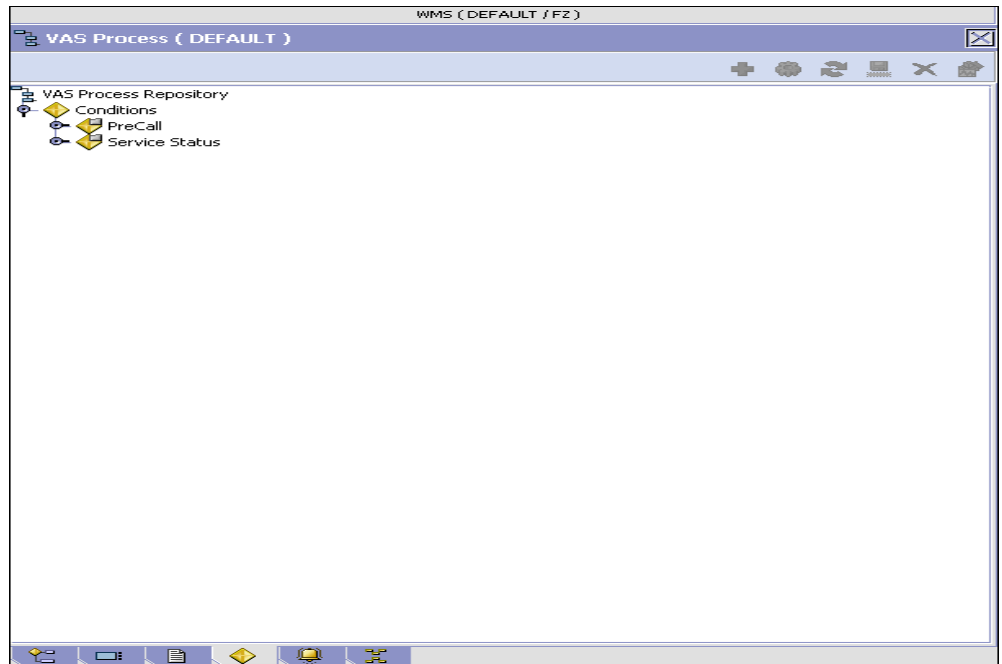
A **condition** matches document type attributes against decision points and routes the documents to different paths based on the specified attribute and value combinations. The document type attributes against which conditions can be created are predefined in Yantra 7x. You can use these attributes in any combination or you can create conditions that execute the appropriate application logic for specific circumstances.

For more information about Conditions, see *Yantra 7x Platform Configuration Guide*.

To view the condition details of a Value Added Services pipeline:

1. From the tree in the application rules side panel, choose VAS > VAS Process > VAS Process Model. The Work Order VAS window is displayed.
2. In the Work Order VAS window, choose .
3. The Conditions tab window is displayed.

For more information about creating and modifying Conditions, see *Yantra 7x Platform Configuration Guide*.



**Table 8–32 Work Order VAS Pipeline - Conditions Tab Window**

Field	Description
Conditions	Displays service definitions that are specific to the VAS pipeline, if any.

Yantra 7x WMS default pipeline does not have any service definitions specified.


## 8.10.7 Actions

An **action** is a process or program that is triggered by an event. These processes and programs send user alert notifications and automatically resolve issues.

For example, when an order is released (the event), you can set an action to send the customer an e-mail.

For more information about Actions, see *Yantra 7x Platform Configuration Guide*.

To view the action details of a VAS pipeline:

1. From the tree in the application rules side panel, choose VAS > VAS Process > VAS Process Model. The Work Order VAS window is displayed.
2. In the Work Order VAS window, choose .
3. The Actions tab window is displayed.

For more information about viewing the action details, see [Section 3.12.3, "Actions"](#).


For more information about creating or modifying Actions, see *Yantra 7x Platform Configuration Guide*.

### 8.10.8 Service Definitions

Service definitions are a representation of the logic that regulates document workflow services. The Service Builder is a graphical interface that enables you to create a graphical representation of these *services*.

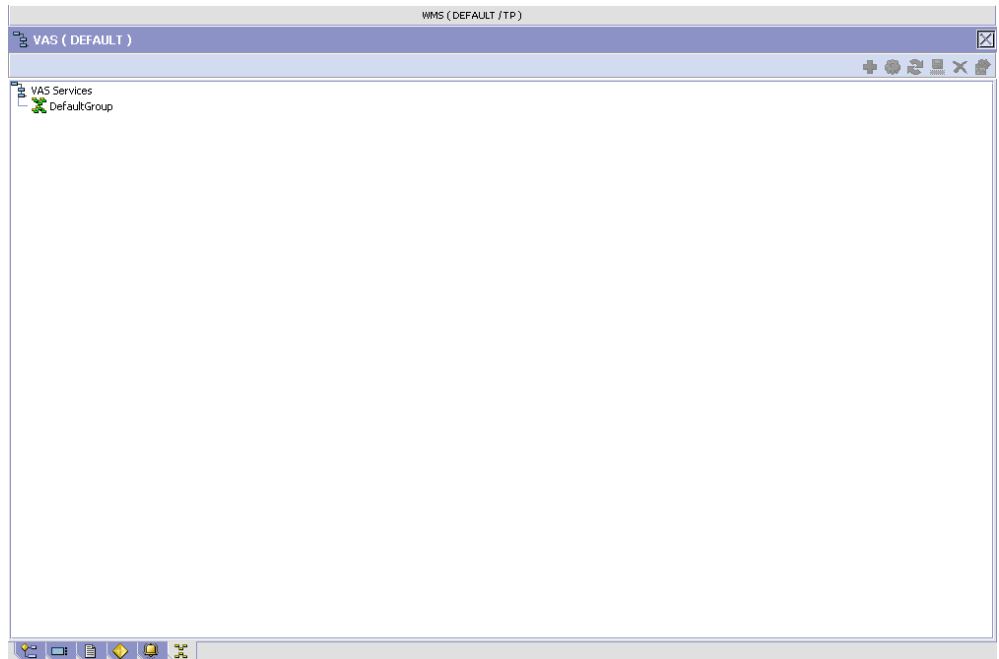
For more information about Service Definitions, see *Yantra 7x Platform Configuration Guide*.

To view the service definition details of a VAS pipeline:

1. From the tree in the application rules side panel, choose VAS > VAS Process > VAS Process Model. The Work Order VAS window is displayed.
2. In the Work Order VAS window, choose .
3. The Service Definitions tab window is displayed.

For more information about creating or modifying Service Definitions, see *Yantra 7x Platform Configuration Guide*.





**Table 8–33 Work Order VAS Pipeline - Service Definition Tab Window**

Field	Description
Service Definitions	Displays service definitions that are specific to the VAS pipeline, if any.

Yantra 7x WMS default pipeline does not have any service definitions specified.

## 8.11 Defining Purge Criteria

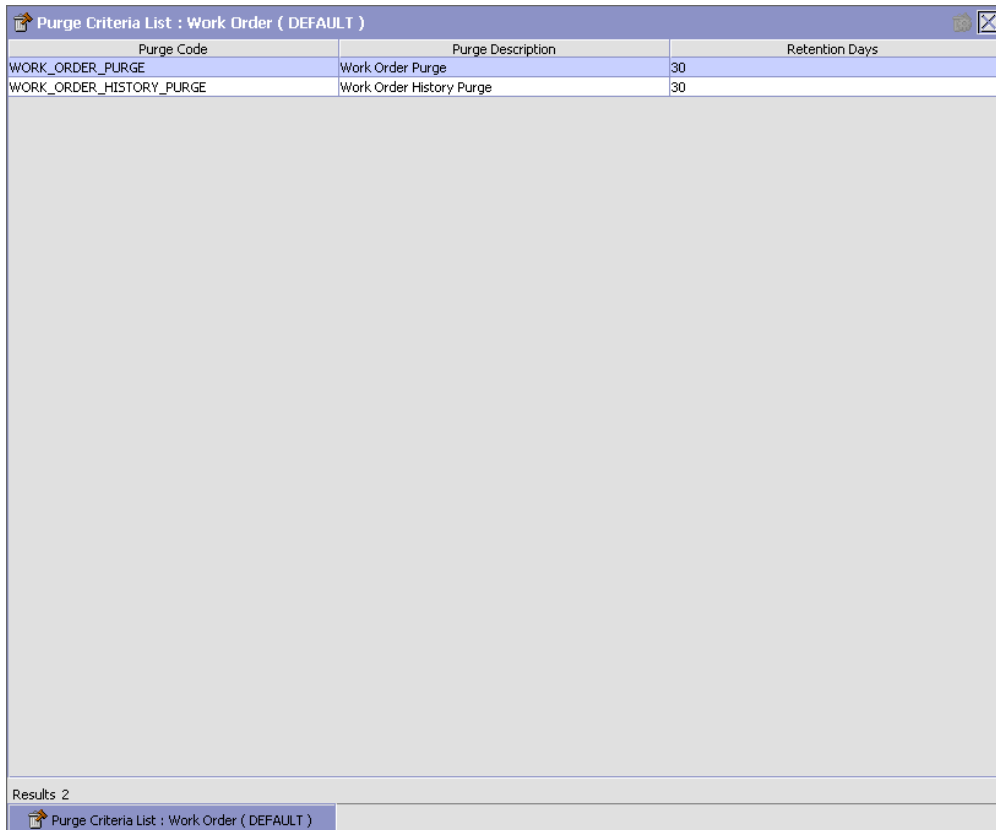
Transactional data collected by Yantra 7x WMS during the execution are periodically removed from the 'live' transactional tables. It is common to retain order related information for extended periods of time. There are history tables provided for relevant transactional tables to move data from the day-to-day 'live' tables to a historical table.

Purge is the process by which old data is removed from the system database. A purge minimizes the number of unused database records to increase search efficiency and reduces the size of the required physical disk.

### 8.11.1 Setting Up Purge Criteria

To set up purge criteria:

1. From the tree in the application rules side panel, choose VAS > VAS Process > Purge Criteria. The Purge Criteria List window is displayed.





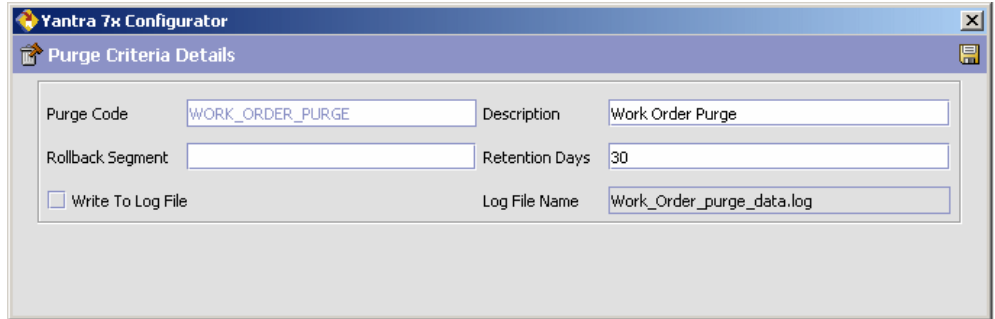
Purge Code	Purge Description	Retention Days
WORK_ORDER_PURGE	Work Order Purge	30
WORK_ORDER_HISTORY_PURGE	Work Order History Purge	30

Results 2

Purge Criteria List : Work Order ( DEFAULT )

2. In the Purge Criteria List window, choose the Purge Code whose Purge Criteria is to be set up.

3. Choose . The Purge Criteria Details pop-up window appears.
4. Enter information in the applicable fields. Refer [Table 8–34](#) for field value descriptions.
5. Choose .



**Table 8–34 Purge Criteria Details Pop-up Window**

Field	Description
Purge Code	Identifies a purge program. This is a system defined code.
Description	Description of the purge.
Rollback Segment	Defines the rollback segment that should be explicitly used for the purge transaction qualified by the purge code.  This is useful when there are huge logical data sets that have to be purged. This is optional and used for order related purges.
Retention Days	Enter the number of days of data to be retained in the database (going backwards from the time the program runs). Make sure that your table size takes into account the number of retention days entered here.

**Table 8–34** *Purge Criteria Details Pop-up Window*

Field	Description
Write To Log File	Check this box if you want purged data written to a log. The log can be backed up and used as a journal at a later date.
Log File Name	<p>Enter a log file name. This is applicable only if 'Write To Log File' is checked. This file consists records of the specific table that is purged.</p> <p>The log file is created in the directory specified in the <code>yfs.purge.path</code> of <code>yfs.properties</code>. If a variable is introduced, then <code>yfs.purge.path</code> is ignored. For more information on using variables for the log file directory refer to <i>Yantra 7x Customization Guide</i>.</p> <p>For information about filename limitations related to internationalization, see the <i>Yantra 7x Localization Guide</i>.</p>

## Configuring Packing

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Packing activities in a warehouse are determined based on the strategies used in outbound planning. For example, a warehouse that containerizes on wave release (pre-pick containerization) or a warehouse that picks the product to a pack station and then performs manual containerization.

The pack process and its activities are specified here.

Use Packing for:

- [Defining Activities](#)
- [Defining Activity Constraints](#)
- [Defining Pack Planning](#)
- [Defining Inventory Containers](#)
- [Defining Shipping Containers](#)
- [Defining Pack Modification Rules](#)
- [Defining Pack Process Type Details](#)
- [Defining Pack Process Model](#)

### 9.1 Defining Activities

Activities in the warehouse are grouped into Activity Groups. Yantra 7x WMS provides a pre-defined set of activity groups for a warehouse. Examples of activity groups include Receiving, VAS, Picking and Packing.

Each activity group is associated with activity codes that define each activity that is performed. For example, receiving activity group has pre-receiving, Packing and receiving activities.

The list here is specific to the Packing process.

---

---

**Note:** Activity Codes and Activity Constraints may be defined only when the WMS tree is loaded for Node / Hub combination.

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Use Activities for:

- [Creating an Activity Code](#)
- [Modifying an Activity Code](#)
- [Deleting an Activity Code](#)
- [Setting Up Activity Constraints for Container](#)

### 9.1.1 Creating an Activity Code

To create an activity code:

1. From the tree in the application rules side panel, choose Packing > Activities. The Activities window is displayed.
2. Enter information in the applicable fields. Refer [Table 9–1](#) for field value descriptions.
3. Choose .

**Activities ( DEFAULT )**

Activity Group:

**Activity List**

Activity Code	Description
PACK	Packing
RESOLVE-SHORT-PICK	Resolve short pick
*	

Results 2 Of 2

**Activities ( DEFAULT )**


**Table 9–1 Activities Window**

Field	Description
Activity Group	This is automatically populated by the system as 'Packing'.
<b>Activity List</b>	
Activity Code	Enter a name for the activity code. Activity code is the unique identity of the activity.
Description	Enter a brief description for the activity code.

### 9.1.2 Modifying an Activity Code

Once an activity code has been created, it can be modified.


To modify an activity code:

1. From the tree in the application rules side panel, choose Packing > Activities. The Activities window is displayed, with the list of activities.
2. Enter information in the applicable fields. Refer [Table 9–1](#) for field value descriptions.
3. Choose .

*It is recommended that the Yantra 7x WMS provided list of activity codes are not modified.*

### 9.1.3 Deleting an Activity Code

To delete an activity code:

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

*It is recommended that the Yantra 7x WMS provided list of activity codes are not deleted.*

## 9.2 Defining Activity Constraints

Activities in the warehouse are performed based on attributes of the inventory being received.

The attributes considered for the activity code 'Packing' are single-SKU and multi-SKU/multi-level container, while the attribute considered for all other activity codes belonging to the Packing process is container.

---

**NOTE:** In Pack activity based on what inventory you are packing (Loose Product, inventory case, or inventory pallet) you need to go to the appropriate Activity Constraints screen.

---



Use Activity Constraint set-up for:

- [Setting Up Activity Constraints for Single SKU](#)
- [Setting Up Activity Constraints for Multi-SKU/Multi-Level Container](#)
- [Setting Up Activity Constraints for Container](#)

## 9.2.1 Setting Up Activity Constraints for Single SKU

The constraints for the activity of a single SKU are specified here.

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**Note:** Activity constraints for single SKU is applicable only to the 'Packing' activity code.

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Use Activity Constraint set-up for:

- [Creating an Activity Constraint for Single SKU](#)
- [Creating a New Activity Constraint for Single SKU from an Existing Activity Constraint](#)
- [Modifying an Activity Constraint for Single SKU](#)
- [Deleting an Activity Constraint for Single SKU](#)

### 9.2.1.1 Creating an Activity Constraint for Single SKU

To create an activity constraint for single SKU:

1. From the tree in the application rules side panel, choose Packing > Activities. The Activity Search window is displayed, with the list of activities.
2. Choose the Activity Code whose Activity Constraint is to be set up.
3. Choose . The Activity Constraints window is displayed.
4. In the Activity Constraints window, choose the Single-SKU tab. The Single-SKU tab window for Activity Constraints is displayed.

Activity Constraints ( DEFAULT / MA03 )

Activity Code

Single-SKU Multi-SKU/Multi-Level Container

Activity Constraints ( DEFAULT / MA03 )


Description	Specific To Activity Group	Product Class	Inventory Status	UOM
-------------	----------------------------	---------------	------------------	-----

Results 0 Of 0

Activity Search ( DEFAULT ) Activity Constraints ( DEFAULT / MA03 )

5. In the Single-SKU tab window, choose . The Activity Constraint Details window is displayed.
6. Enter information in the applicable fields. Refer [Table 9–2](#) for field value descriptions.
7. Choose .

**Activity Constraint Details ( DEFAULT / MA03 ) : Single-SKU**

Description  To View Strategy Click here 

Activity Code  Requesting Activity Group


Product Class  Inventory Status

Segment Type  Segment

UOM  Container Type

Item Classification


**Location Priorities**

Priority	Location
4	Bulk Loc 
*	


Results 1 Of 1

Activity Search ( DEFAULT )   Activity Constraints ( DEFAULT / MA0...   **Activity Constraint Details ( DEFAULT / MA03 ) : Single-SKU**

**Table 9–2 Activity Constraint Details - Single-SKU Tab Window**

Field	Description
Description	Enter a description for the activity constraint.
To View Strategy Click here	Choose  to view or set up Putaway Strategy. For more details on setting up a putaway strategy see <a href="#">Setting Up Putaway Strategy for Single-SKUs</a> . Note: Putaway strategy may be specified for the putaway preferences after the preference is saved.
Activity Code	This indicates the activity code for the constraint.

**Table 9–2 Activity Constraint Details - Single-SKU Tab Window**

Field	Description
Requesting Activity Group	Choose the requesting activity group. Typical values are Receipt, Packing, and Value Added Services.
Product Class	Choose the product class for the constraint, if applicable.  Product class is the inventory classification of an item based on product's characteristics. Typical values are FQ - First Quality, SQ - Second Quality, etc.
Inventory Status	Choose the inventory status for the constraint, if applicable.  Inventory status refers to an inventory sub classification based on the results of the inventory control processes within the warehouse.
Segment Type	Choose the segment type for the constraint, if applicable.  This indicates an inventory category. Typical values are MTC – Made to Customer, and MTO - Made to Order.
Segment #	Enter the segment number for the constraint, if applicable.  A segment holds either the specific buyer or specific order number that requires dedication.
UOM	Choose the UOM for the constraint, if applicable. UOM points to the Unit of measure of the item.
Container Type	The Container type associated with the UOM selected is displayed. Typical values are "Pallet" and "Case".
<b>Item Classification</b>	<b>List of putaway item classifications for the Enterprise are displayed. An example, Product Line is shown below.</b>
Product Line	Choose relevant product line item classification for the putaway activity.  Choose  . In the Classification window, select the applicable product line classification.
<b>Location Priorities</b>	


**Table 9–2 Activity Constraint Details - Single-SKU Tab Window**

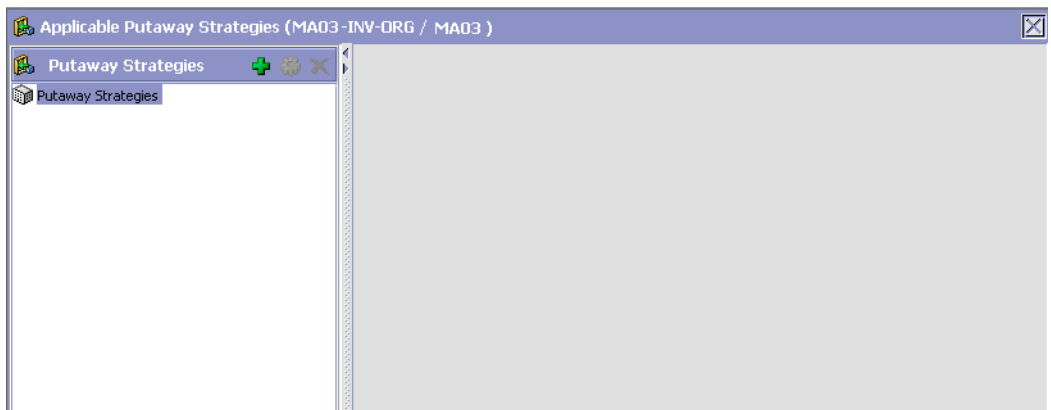
Field	Description
Priority	<p>Enter a number to represent the priority.</p> <p>The priority is used to sequence the order in which the location priorities are evaluated. For example, all storage code level priorities are to be evaluated first before generic priorities.</p> <p>The priority needs to be a positive integer, greater than zero. This is a mandatory field.</p>
Location	<p>Choose the relevant location for the activity.</p> <p>This is a mandatory field.</p>


### Setting Up Putaway Strategy for Single-SKUs


You can set up putaway strategies to putaway applicable inventory from a source zone to a target zone, based on the strategy specified.

To set up putaway strategy for single-SKUs:

1. In the Activity Constraint Details : Single SKU window, choose .
2. The Applicable Putaway Strategies window is displayed.



3. Choose  in the Putaway Strategies panel. The Putaway Strategy Details window appears in the right panel.
4. Enter information in the applicable fields. See the Putaway Strategy Details Window table for field value descriptions.

5. Choose .

Putaway Strategy Details

Description

Strategy for DVD-LockAndKey-EACH

UOM

CASE

Item Classification

Product Line

DVD

StorageType

LockAndKey

Product Line

System Directed Putaway Task Types

	Source Zone	Target Zone	Container Type	Task Type
*				




Results 0 Of 0

Ad Hoc Task Types

	Source Zone	Target Zone	Container Type	Task Type
*				

Results 0 Of 0

**Table 9–3 Putaway Strategy Details Window**

Field	Description
Description	Enter a description for the Putaway Strategy.
UOM	Select the UOM for the Putaway Strategy, if applicable. Note: The UOM will be defaulted in instances where it has been specified in the Putaway Preference Details screen.
<b>Item Classification</b>	List of putaway item classifications for the Enterprise are displayed. An example, Product Line is shown below.
Product Line	Choose relevant product line item classification for the putaway activity.  Choose  . In the Classification Values window, select the applicable product line classification.
<b>System Directed Putaway Task Types</b>	<b>Displays the list of existing system directed putaway task types.</b>  <b>You may use  to delete an existing system directed putaway task type.</b>
Source Zone	Select the source zone where inventory is available.
Target Zone	Select the target zone where you want to move the inventory.
Container Type	Select the container type to be used to move the inventory from the source zone to the target zone. Typical values are Case and Pallet.
Task Type	Select the Putaway Task Type applicable to this putaway strategy. This field displays the list of existing system directed task types that belong to the 'PUTAWAY' activity group.
<b>Ad hoc Task Types</b>	<b>Displays the list of existing ad hoc task types.</b>  <b>You may use  to delete an existing ad hoc task type.</b>
Source Zone	Select the source zone where inventory is available.
Target Zone	Select the target zone where you want to move the inventory.




**Table 9–3 Putaway Strategy Details Window**

Field	Description
Container Type	Select the container type to be used to move the inventory from the source zone to the target zone. Typical values are Case and Pallet.
Task Type	Select the Putaway Task Type applicable to this putaway strategy. This field displays the list of existing ad hoc task types that belong to the 'PUTAWAY' activity group.

6.

### 9.2.1.2 Creating a New Activity Constraint for Single SKU from an Existing Activity Constraint




To create a new activity constraint for single SKU from an existing activity constraint:

1. From the tree in the application rules side panel, choose Packing > Activities. The Activity Search window is displayed, with the list of activities.
2. Choose the Activity Code whose Activity Constraint is to be set up.
3. Choose . The Activity Constraints window is displayed.
4. In the Activity Constraints window, choose the Single-SKU tab. The Single-SKU tab window for Activity Constraints is displayed.
5. In the Single-SKU tab window, choose the activity constraint that is to be copied from.
6. Choose . The Activity Constraint Details window is displayed.
7. Enter information in the applicable fields. Refer [Table 9–2](#) for field value descriptions.
8. Choose .

### 9.2.1.3 Modifying an Activity Constraint for Single SKU



To modify an activity constraint for single SKU:



1. From the tree in the application rules side panel, choose Packing > Activities. The Activity Search window is displayed, with the list of activities.
2. Choose the Activity Code whose Activity Constraint is to be modified.
3. Choose . The Activity Constraints window is displayed.
4. In the Activity Constraints window, choose the Single-SKU tab. The Single-SKU tab window for Activity Constraints is displayed.
5. In the Single-SKU tab window, choose the activity constraint that is to be modified.
6. Choose . The Activity Constraint Details window is displayed.
7. Enter information in the applicable fields. Refer [Table 9–2](#) for field value descriptions.
8. Choose .

#### 9.2.1.4 Deleting an Activity Constraint for Single SKU

To delete an activity constraint for single SKU:

1. From the tree in the application rules side panel, choose Packing > Activities. The Activity Search window is displayed, with the list of activities.
2. Choose the Activity Code whose Activity Constraint is to be deleted.
3. Choose . The Activity Constraints window is displayed.
4. In the Activity Constraints window, choose the Single-SKU tab. The Single-SKU tab window for Activity Constraints is displayed.
5. In the Single-SKU tab window, choose the activity constraint that is to be deleted.
6. Choose .

### 9.2.2 Setting Up Activity Constraints for Multi-SKU/Multi-Level Container

The constraints for the activity of a multi-level case or pallet are specified here. This also applies to multi-level CASE with LPN and PALLET with LPN.


**Note:** Activity Constraints for Multi-SKU/Multi-Level Container is applicable only to the 'Packing' activity code.

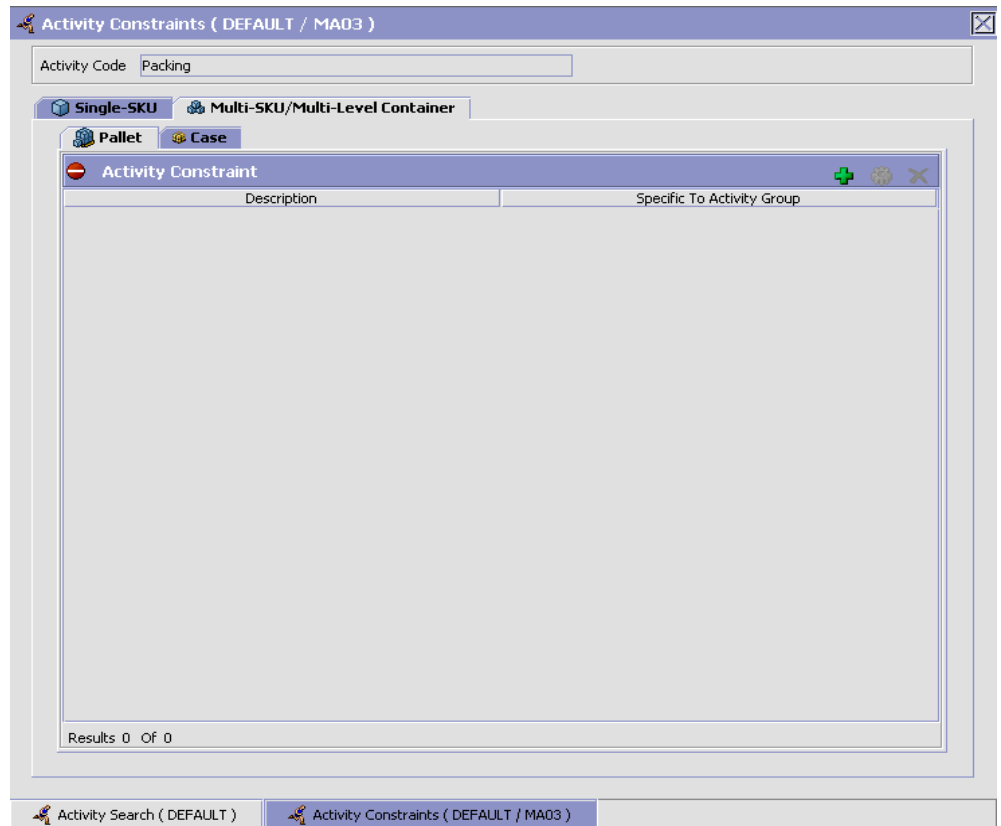
Use the Activity Constraints for Multi-SKU/Multi-Level Container set-up for:

- [Creating an Activity Constraint for Multi-SKU/Multi-Level Container](#)
- [Modifying an Activity Constraint for Multi-SKU/Multi-Level Container](#)
- [Deleting an Activity Constraint for Multi-SKU/Multi-Level Container](#)

### 9.2.2.1 Creating an Activity Constraint for Multi-SKU/Multi-Level Container

To create an activity constraint for multi-SKU/multi-level container:

1. From the tree in the application rules side panel, choose Packing > Activities. The Activity Search window is displayed, with the list of activities.
2. Choose the Activity Code whose Activity Constraint is to be set up.
3. Choose . The Activity Constraints window is displayed.





Activity Constraints for multi-level cases or pallets are specified separately:

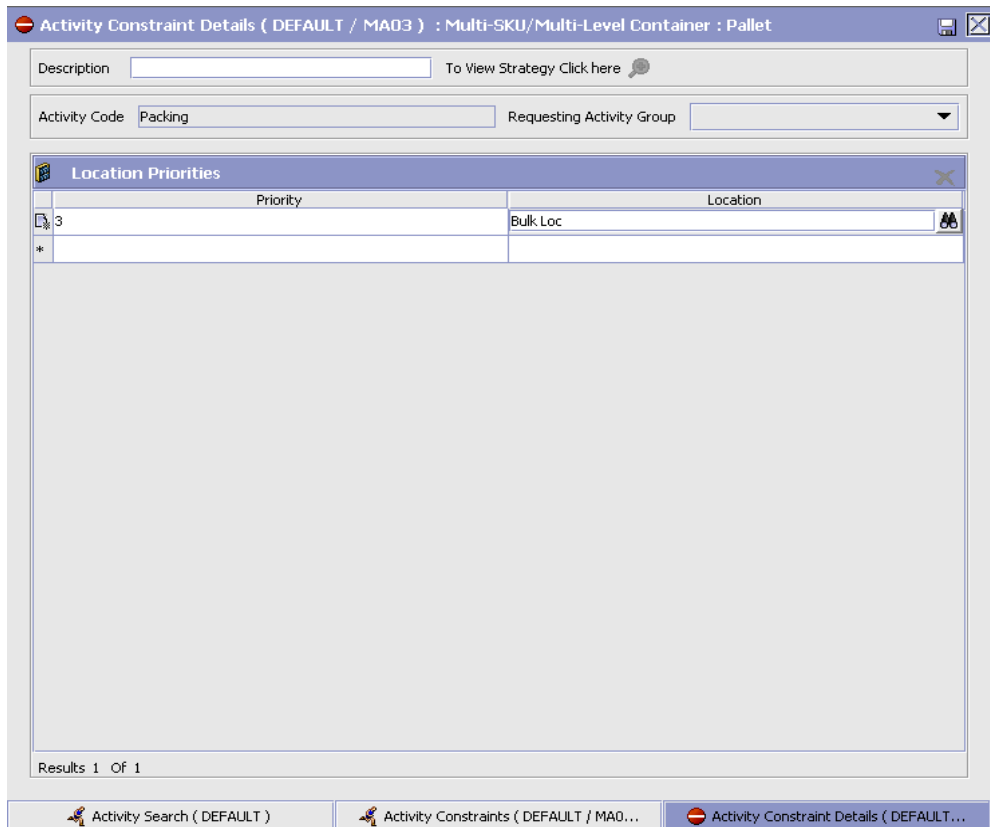
- [Setting Up Activity Constraints for Multi-Level Pallets](#)
- [Setting Up Activity Constraints for Multi-Level Cases](#)

#### 9.2.2.1.1 Setting Up Activity Constraints for Multi-Level Pallets

To set up activity constraints for multi-level pallets:

1. In the Multi-SKU/Multi-Level Container tab of Activity Constraints window, choose the Pallet tab. The Pallet tab window is displayed.
2. In the Pallet tab window, choose .


3. The Activity Constraint Details window appears.
4. Enter information in the applicable fields. Refer [Table 9–4](#) for field value descriptions.
5. Choose .



The screenshot shows the 'Activity Constraint Details' window for 'Multi-SKU/Multi-Level Container : Pallet'. The window has a title bar with a red stop icon and the text 'Activity Constraint Details ( DEFAULT / MA03 ) : Multi-SKU/Multi-Level Container : Pallet'. Below the title bar, there is a 'Description' field and a link 'To View Strategy Click here' with a speech bubble icon. The 'Activity Code' is set to 'Packing' and the 'Requesting Activity Group' is a dropdown menu. A 'Location Priorities' table is displayed, showing one entry with Priority '3' and Location 'Bulk Loc'. The table has columns for 'Priority' and 'Location'. Below the table, it says 'Results 1 Of 1'. At the bottom, there are three tabs: 'Activity Search ( DEFAULT )', 'Activity Constraints ( DEFAULT / MA0...', and 'Activity Constraint Details ( DEFAULT...'.

Priority	Location
3	Bulk Loc


**Table 9–4 Activity Constraint Details - Multi-Level Pallet Tab**

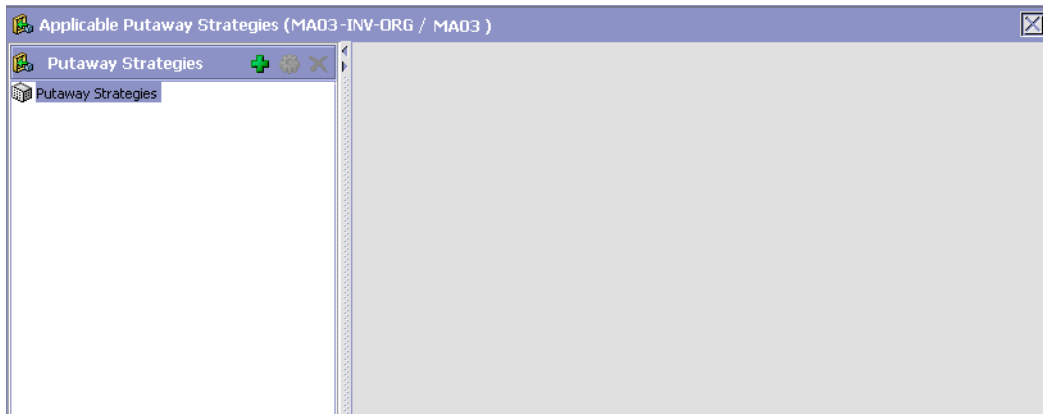
Field	Description
Description	Enter a description for the activity constraint.
To View Strategy Click here	<p>Choose  to view or set up Putaway Strategy. For more details on setting up a putaway strategy see <a href="#">Setting Up Putaway Strategy for Multi-SKU/Multi-Level Containers - Pallets</a>.</p> <p>Note: Putaway strategy may be specified for the putaway preferences after the preference is saved.</p>
Activity Code	This indicates the activity code for the constraint.
Requesting Activity Group	<p>Choose the requesting activity group.</p> <p>Typical values are Receipt, Packing, and Value Added Services.</p>
<b>Location Priorities</b>	
Priority	<p>Enter a number to represent the priority.</p> <p>The priority is used to sequence the order in which the location priorities are evaluated. For example, all storage code level priorities are to be evaluated first before generic priorities.</p> <p>The priority needs to be a positive integer, greater than zero. This is a mandatory field.</p>
Location	<p>Choose the relevant location for the activity.</p> <p>This is a mandatory field.</p>



### Setting Up Putaway Strategy for Multi-SKU/Multi-Level Containers - Pallets

You can set up putaway strategies to putaway applicable inventory from a source zone to a target zone, based on the strategy specified.

To set up putaway strategy for multi-SKU/multi-level container pallets:

1. In the Activity Constraint Details : Multi-SKU/multi-level Containers : Pallet window, choose .
2. The Applicable Putaway Strategies window is displayed.



3. Choose  in the Putaway Strategies panel. The Putaway Strategy Details window appears in the right panel.
4. Enter information in the applicable fields. See the Putaway Strategy Details Window table for field value descriptions.
5. Choose .

**Putaway Strategy Details**

Description: Strategy for DVD-LockAndKey-EACH UOM: CASE

Item Classification

Product Line: DVD

StorageType: LockAndKey

Product Line:

---

**System Directed Putaway Task Types**

	Source Zone	Target Zone	Container Type	Task Type
*				

Results 0 Of 0

---

**Ad Hoc Task Types**




	Source Zone	Target Zone	Container Type	Task Type
*				

Results 0 Of 0

**Table 9–5 Putaway Strategy Details Window**

Field	Description
Description	Enter a description for the Putaway Strategy.
UOM	Select the UOM for the Putaway Strategy, if applicable. Note: The UOM will be defaulted in instances where it has been specified in the Putaway Preference Details screen.

**Table 9–5 Putaway Strategy Details Window**

Field	Description
<b>Item Classification</b>	List of putaway item classifications for the Enterprise are displayed. An example, Product Line is shown below.
Product Line	Choose relevant product line item classification for the putaway activity.  Choose  . In the Classification Values window, select the applicable product line classification.
<b>System Directed Putaway Task Types</b>	<b>Displays the list of existing system directed putaway task types.</b>  <b>You may use  to delete an existing system directed putaway task type.</b>
Source Zone	Select the source zone where inventory is available.
Target Zone	Select the target zone where you want to move the inventory.
Container Type	Select the container type to be used to move the inventory from the source zone to the target zone. Typical values are Case and Pallet.
Task Type	Select the Putaway Task Type applicable to this putaway strategy. This field displays the list of existing system directed task types that belong to the 'PUTAWAY' activity group.
<b>Ad hoc Task Types</b>	<b>Displays the list of existing ad hoc task types.</b>  <b>You may use  to delete an existing ad hoc task type.</b>
Source Zone	Select the source zone where inventory is available.
Target Zone	Select the target zone where you want to move the inventory.



**Table 9–5 Putaway Strategy Details Window**

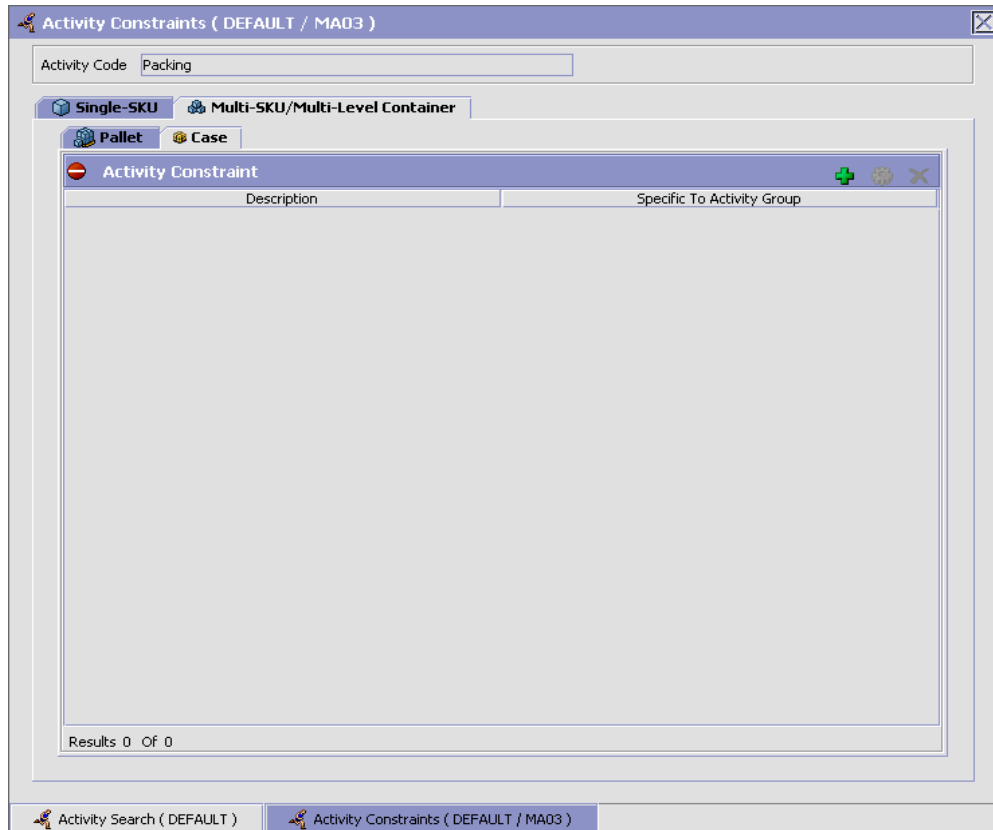
Field	Description
Container Type	Select the container type to be used to move the inventory from the source zone to the target zone. Typical values are Case and Pallet.
Task Type	Select the Putaway Task Type applicable to this putaway strategy. This field displays the list of existing ad hoc task types that belong to the 'PUTAWAY' activity group.



6.

#### 9.2.2.1.2 Setting Up Activity Constraints for Multi-Level Cases

To set up activity constraints for multi-level cases:

1. In the Multi-SKU/Multi-Level Container tab of Activity Constraints window, choose the Case tab. The Case tab window is displayed.



2. In the Case tab window, choose .
3. The Activity Constraint Details window appears.
4. Enter information in the applicable fields. Refer [Table 9–6](#) for field value descriptions.
5. Choose .

**Activity Constraint Details ( DEFAULT / MA03 ) : Multi-SKU/Multi-Level Container : Case**

Description  To View Strategy Click here

Activity Code  Requesting Activity Group

**Location Priorities**

Priority	Location
2	Bulk Loc
*	

Results 1 Of 1

Activity Search ( DEFAULT )   Activity Constraints ( DEFAULT / MA0...   **Activity Constraint Details ( DEFAULT / MA03 )**

**Table 9–6 Activity Constraint Details - Multi-Level Case Tab**

Field	Description
Description	Enter a description for the activity constraint.
To View Strategy Click here	<p>Choose  to view or set up Putaway Strategy. For more details on setting up a putaway strategy see <a href="#">Setting Up Putaway Strategy for Multi-SKU/Multi-Level Containers - Cases</a>.</p> <p>Note: Putaway strategy may be specified for the putaway preferences after the preference is saved.</p>
Activity Code	This indicates the activity code for the constraint.


**Table 9–6 Activity Constraint Details - Multi-Level Case Tab**

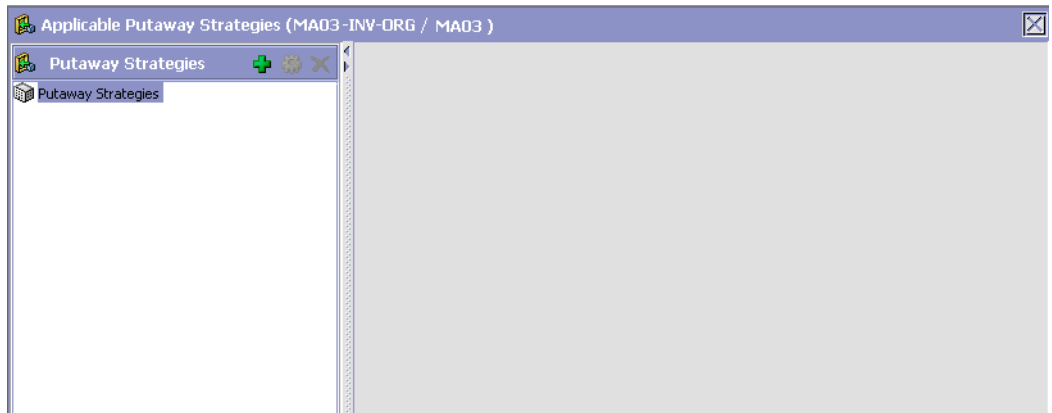
Field	Description
Requesting Activity Group	Choose the requesting activity group. Typical values are Receipt, Packing, and Value Added Services.
<b>Location Priorities</b>	
Priority	Enter a number to represent the priority.  The priority is used to sequence the order in which the location priorities are evaluated. For example, all storage code level priorities are to be evaluated first before generic priorities.  The priority needs to be a positive integer, greater than zero. This is a mandatory field.
Location	Choose the relevant location for the activity. This is a mandatory field.



### Setting Up Putaway Strategy for Multi-SKU/Multi-Level Containers - Cases

You can set up putaway strategies to putaway applicable inventory from a source zone to a target zone, based on the strategy specified.

To set up putaway strategy for multi-SKU/multi-level container cases:

1. In the Activity Constraint Details : Multi-SKU/multi-level Containers : Case window, choose .
2. The Applicable Putaway Strategies window is displayed.



3. Choose  in the Putaway Strategies panel. The Putaway Strategy Details window appears in the right panel.
4. Enter information in the applicable fields. See the Putaway Strategy Details Window table for field value descriptions.
5. Choose .

Putaway Strategy Details

DescriptionStrategy for DVD-LockAndKey-EACHUOMCASE

Item Classification

Product LineDVD

StorageTypeLockAndKey

Product Line

System Directed Putaway Task Types

	Source Zone	Target Zone	Container Type	Task Type
*				

Results 0 Of 0

Ad Hoc Task Types




	Source Zone	Target Zone	Container Type	Task Type
*				

Results 0 Of 0

Table 9–7 Putaway Strategy Details Window

Field	Description
Description	Enter a description for the Putaway Strategy.
UOM	Select the UOM for the Putaway Strategy, if applicable. Note: The UOM will be defaulted in instances where it has been specified in the Putaway Preference Details screen.




**Table 9–7 Putaway Strategy Details Window**

Field	Description
<b>Item Classification</b>	List of putaway item classifications for the Enterprise are displayed. An example, Product Line is shown below.
Product Line	Choose relevant product line item classification for the putaway activity.  Choose  . In the Classification Values window, select the applicable product line classification.
<b>System Directed Putaway Task Types</b>	<b>Displays the list of existing system directed putaway task types.</b>  <b>You may use  to delete an existing system directed putaway task type.</b>
Source Zone	Select the source zone where inventory is available.
Target Zone	Select the target zone where you want to move the inventory.
Container Type	Select the container type to be used to move the inventory from the source zone to the target zone. Typical values are Case and Pallet.
Task Type	Select the Putaway Task Type applicable to this putaway strategy. This field displays the list of existing system directed task types that belong to the 'PUTAWAY' activity group.
<b>Ad hoc Task Types</b>	<b>Displays the list of existing ad hoc task types.</b>  <b>You may use  to delete an existing ad hoc task type.</b>
Source Zone	Select the source zone where inventory is available.
Target Zone	Select the target zone where you want to move the inventory.
Container Type	Select the container type to be used to move the inventory from the source zone to the target zone. Typical values are Case and Pallet.
Task Type	Select the Putaway Task Type applicable to this putaway strategy. This field displays the list of existing ad hoc task types that belong to the 'PUTAWAY' activity group.

6.


### 9.2.2.2 Modifying an Activity Constraint for Multi-SKU/Multi-Level Container

To modify an activity constraint for multi-SKU/multi-level container:


1. From the tree in the application rules side panel, choose Packing > Activities. The Activity Search window is displayed, with the list of activities.
2. Choose the Activity Code whose Activity Constraint is to be modified.
3. Choose . The Activity Constraints window is displayed.
4. In the Activity Constraints window, choose the Multi-SKU/Multi-Level Container tab. The Multi-SKU/Multi-Level Container tab window for Activity Constraints is displayed.
5. In the Multi-SKU/Multi-Level Container tab window, choose the activity constraint that is to be modified.
6. Choose . The Activity Constraint Details window is displayed.
7. Enter information in the applicable fields. For more information about modifying the fields, see [Section 9.2.2.1.1, "Setting Up Activity Constraints for Multi-Level Pallets"](#) on page 757 and [Section 9.2.2.1.2, "Setting Up Activity Constraints for Multi-Level Cases"](#) on page 763.
8. Choose .

### 9.2.2.3 Deleting an Activity Constraint for Multi-SKU/Multi-Level Container

To delete an activity constraint for Multi-SKU/Multi-Level Container:

1. From the tree in the application rules side panel, choose Packing > Activities. The Activity Search window is displayed, with the list of activities.
2. Choose the Activity Code whose Activity Constraint is to be modified.
3. Choose . The Activity Constraints window is displayed.
4. In the Activity Constraints window, choose the Multi-SKU/Multi-Level Container tab. The Multi-SKU/Multi-Level Container tab window for Activity Constraints is displayed.



5. In the Multi-SKU/Multi-Level Container tab window, choose the activity constraint that is to be deleted.
6. Choose .

### 9.2.3 Setting Up Activity Constraints for Container

The constraints for the activity of a Container are specified here. This also applies to CASE with LPN and PALLET with LPN.


**Note:** Activity Constraints for Container is applicable to all the activity codes, other than the 'Packing' activity code.

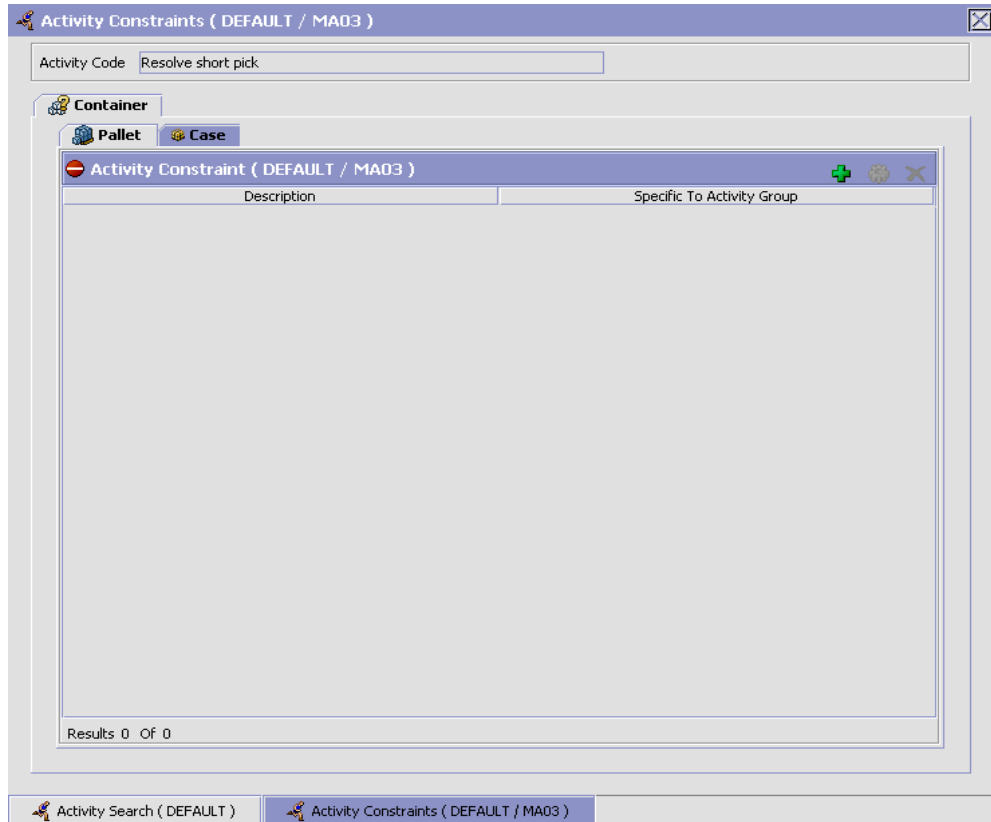
Use the Activity Constraints for Container set-up for:

- [Creating an Activity Constraint for Container](#)
- [Modifying an Activity Constraint for Container](#)
- [Deleting an Activity Constraint for Container](#)

#### 9.2.3.1 Creating an Activity Constraint for Container

To create an activity constraint for Container:

1. From the tree in the application rules side panel, choose Packing > Activities. The Activity Search window is displayed, with the list of activities.
2. Choose the Activity List whose Activity Constraint is to be set up.
3. Choose . The Activity Constraints window is displayed.
4. In the Activity Constraints window, choose the Container tab. The Container tab window for Activity Constraints is displayed.





Activity Constraints for Container cases or pallets are specified separately:

- [Setting Up Activity Constraints for Pallets](#)
- [Setting Up Activity Constraints for Cases](#)


### 9.2.3.1.1 Setting Up Activity Constraints for Pallets

To set up activity constraints for pallets:


1. In the Container tab of Activity Constraints window, choose the Pallet tab. The Pallet tab window is displayed.
2. In the Pallet tab window, choose .

3. The Activity Constraint Details window appears.
4. Enter information in the applicable fields. Refer [Table 9–8](#) for field value descriptions.
5. Choose .

Activity Constraint Details ( DEFAULT / MA03 ) : Container with unknown contents : Pallet

Description  To View Strategy Click here 


Activity Code  Requesting Activity Group

Location Priorities	
Priority	Location
2	Pack_Loc 
*	

Results 1 Of 1

Activity Search ( DEFAULT )    Activity Constraints ( DEFAULT / MA0...    Activity Constraint Details ( DEFAULT...


**Table 9–8 Activity Constraint Details - Pallet Tab**

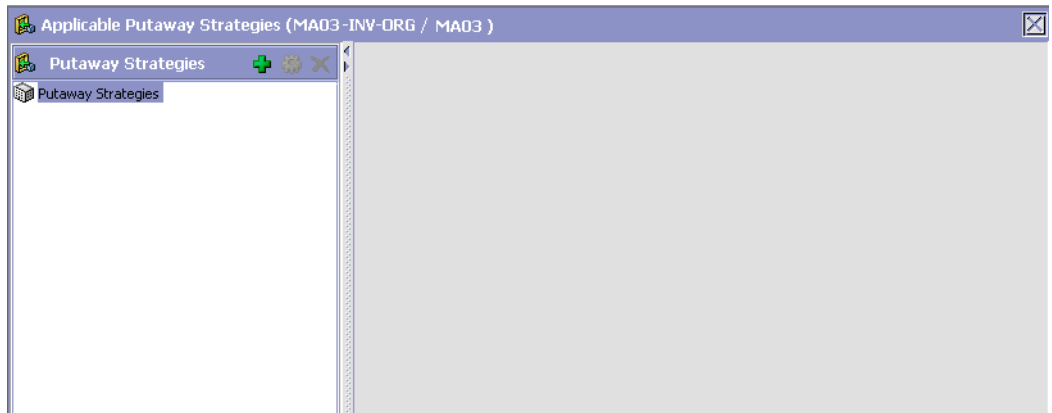
Field	Description
Description	Enter a description for the activity constraint.
To View Strategy Click here	<p>Choose  to view or set up Putaway Strategy. For more details on setting up a putaway strategy see <a href="#">Setting Up Putaway Strategy for Container with Unknown contents - Pallets</a>.</p> <p>Note: Putaway strategy may be specified for the putaway preferences after the preference is saved.</p>
Activity Code	This indicates the activity code for the constraint.
Requesting Activity Group	<p>Choose the requesting activity group.</p> <p>Typical value is Outbound Picking.</p>
<b>Location Priorities</b>	
Priority	<p>Enter a number to represent the priority.</p> <p>The priority is used to sequence the order in which the zone priorities are evaluated. For example, all storage code level priorities are to be evaluated first before generic priorities.</p> <p>The priority needs to be a positive integer, greater than zero. This is a mandatory field.</p>
Location	<p>Choose the relevant location for the activity.</p> <p>This is a mandatory field.</p>



### Setting Up Putaway Strategy for Container with Unknown contents - Pallets

You can set up putaway strategies to putaway applicable inventory from a source zone to a target zone, based on the strategy specified.

To set up putaway strategy for container with unknown content pallets:

1. In the Activity Constraint Details : Container with unknown contents : Pallet window, choose .
2. The Applicable Putaway Strategies window is displayed.



3. Choose  in the Putaway Strategies panel. The Putaway Strategy Details window appears in the right panel.
4. Enter information in the applicable fields. See the Putaway Strategy Details Window table for field value descriptions.
5. Choose .

Putaway Strategy Details

DescriptionStrategy for DVD-LockAndKey-EACHUOMCASE

Item Classification

Product LineDVD

StorageTypeLockAndKey

Product Line

System Directed Putaway Task Types

	Source Zone	Target Zone	Container Type	Task Type
*				

Results 0 Of 0

Ad Hoc Task Types




	Source Zone	Target Zone	Container Type	Task Type
*				

Results 0 Of 0

Table 9–9 Putaway Strategy Details Window

Field	Description
Description	Enter a description for the Putaway Strategy.
UOM	Select the UOM for the Putaway Strategy, if applicable. Note: The UOM will be defaulted in instances where it has been specified in the Putaway Preference Details screen.

**Table 9–9 Putaway Strategy Details Window**

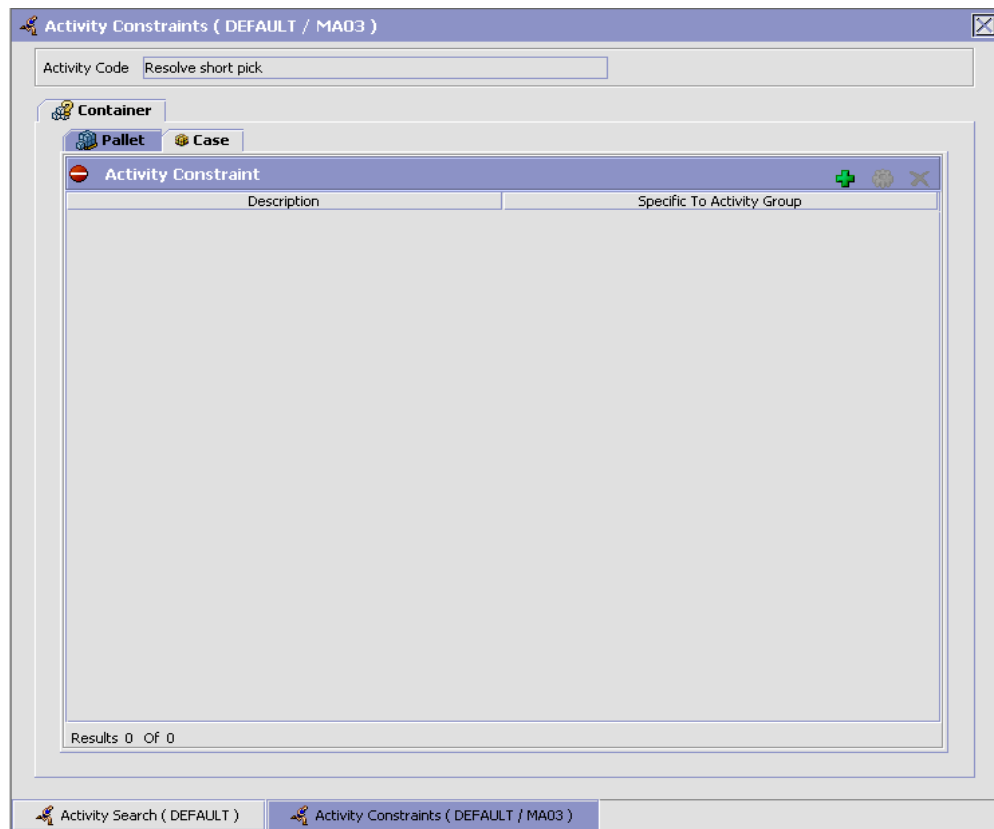
Field	Description
<b>Item Classification</b>	List of putaway item classifications for the Enterprise are displayed. An example, Product Line is shown below.
Product Line	Choose relevant product line item classification for the putaway activity.  Choose  . In the Classification Values window, select the applicable product line classification.
<b>System Directed Putaway Task Types</b>	<b>Displays the list of existing system directed putaway task types.</b>  <b>You may use  to delete an existing system directed putaway task type.</b>
Source Zone	Select the source zone where inventory is available.
Target Zone	Select the target zone where you want to move the inventory.
Container Type	Select the container type to be used to move the inventory from the source zone to the target zone. Typical values are Case and Pallet.
Task Type	Select the Putaway Task Type applicable to this putaway strategy. This field displays the list of existing system directed task types that belong to the 'PUTAWAY' activity group.
<b>Ad hoc Task Types</b>	<b>Displays the list of existing ad hoc task types.</b>  <b>You may use  to delete an existing ad hoc task type.</b>
Source Zone	Select the source zone where inventory is available.
Target Zone	Select the target zone where you want to move the inventory.
Container Type	Select the container type to be used to move the inventory from the source zone to the target zone. Typical values are Case and Pallet.
Task Type	Select the Putaway Task Type applicable to this putaway strategy. This field displays the list of existing ad hoc task types that belong to the 'PUTAWAY' activity group.


6.

### 9.2.3.1.2 Setting Up Activity Constraints for Cases

To set up activity constraints for cases:

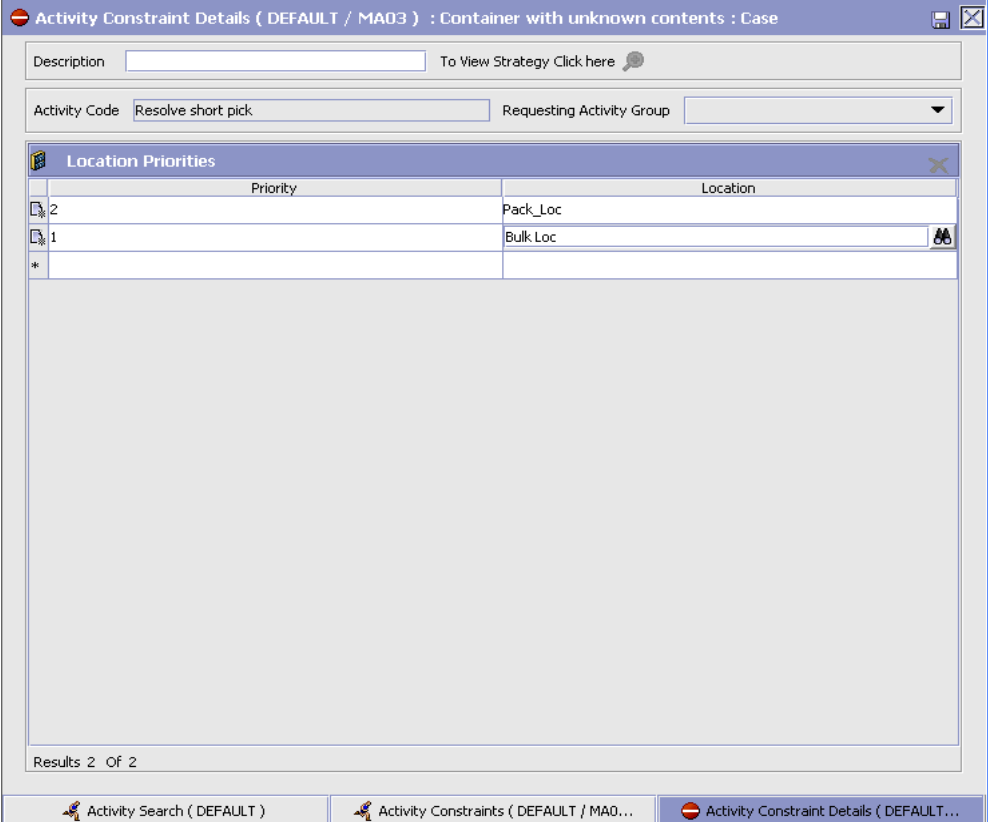
1. In the Container tab of Activity Constraints window, choose the Case tab. The Case tab window is displayed.




2. In the Case tab window, choose .
3. The Activity Constraint Details window appears.
4. Enter information in the applicable fields. Refer [Table 9–10](#) for field value descriptions.




5. Choose .



Activity Constraint Details ( DEFAULT / MA03 ) : Container with unknown contents : Case

Description  To View Strategy Click here 


Activity Code  Requesting Activity Group

Location Priorities	
Priority	Location
2	Pack_Loc
1	Bulk Loc 
*	

Results 2 Of 2

Activity Search ( DEFAULT )   Activity Constraints ( DEFAULT / MA0...   Activity Constraint Details ( DEFAULT...

**Table 9–10 Activity Constraint Details - Case Tab**

Field	Description
Description	Enter a description for the activity constraint.
To View Strategy Click here	<p>Choose  to view or set up Putaway Strategy. For more details on setting up a putaway strategy see <a href="#">Setting Up Putaway Strategy for Container with unknown contents - Cases</a>.</p> <p>Note: Putaway strategy may be specified for the putaway preferences after the preference is saved.</p>


**Table 9–10 Activity Constraint Details - Case Tab**

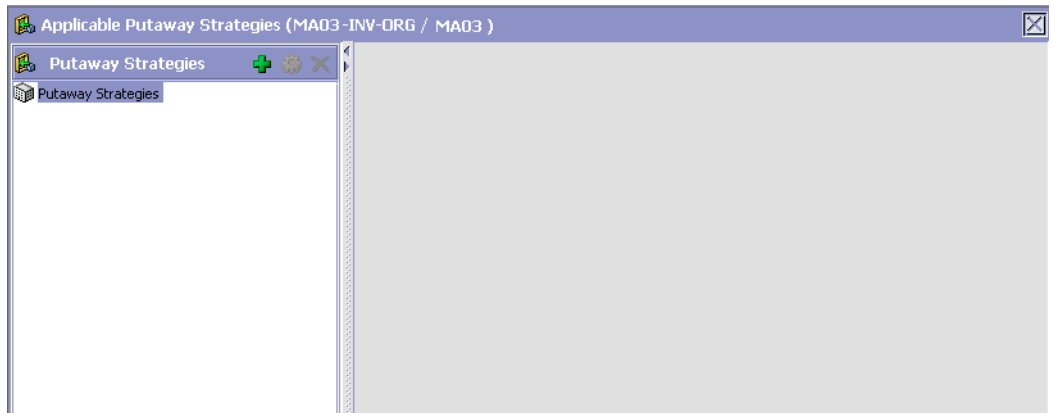
Field	Description
Activity Code	This indicates the activity code for the constraint.
Requesting Activity Group	Choose the requesting activity group. Typical value is Outbound Picking.
<b>Location Priorities</b>	
Priority	Enter a number to represent the priority.  The priority is used to sequence the order in which the zone priorities are evaluated. For example, all storage code level priorities are to be evaluated first before generic priorities.  The priority needs to be a positive integer, greater than zero. This is a mandatory field.
Location	Choose the relevant location for the activity.  This is a mandatory field.



### Setting Up Putaway Strategy for Container with unknown contents - Cases

You can set up putaway strategies to putaway applicable inventory from a source zone to a target zone, based on the strategy specified.

To set up putaway strategy for Container with unknown contents cases:

1. In the Activity Constraint Details : Container with unknown content : Case window, choose .
2. The Applicable Putaway Strategies window is displayed.



3. Choose  in the Putaway Strategies panel. The Putaway Strategy Details window appears in the right panel.
4. Enter information in the applicable fields. See the Putaway Strategy Details Window table for field value descriptions.
5. Choose .

Putaway Strategy Details

DescriptionStrategy for DVD-LockAndKey-EACHUOMCASE

Item Classification

Product LineDVD

StorageTypeLockAndKey

Product Line

System Directed Putaway Task Types

	Source Zone	Target Zone	Container Type	Task Type
*				

Results 0 Of 0

Ad Hoc Task Types




	Source Zone	Target Zone	Container Type	Task Type
*				

Results 0 Of 0

Table 9–11 Putaway Strategy Details Window

Field	Description
Description	Enter a description for the Putaway Strategy.
UOM	Select the UOM for the Putaway Strategy, if applicable. Note: The UOM will be defaulted in instances where it has been specified in the Putaway Preference Details screen.




**Table 9–11 Putaway Strategy Details Window**

Field	Description
<b>Item Classification</b>	List of putaway item classifications for the Enterprise are displayed. An example, Product Line is shown below.
Product Line	Choose relevant product line item classification for the putaway activity.  Choose  . In the Classification Values window, select the applicable product line classification.
<b>System Directed Putaway Task Types</b>	<b>Displays the list of existing system directed putaway task types.</b>  <b>You may use  to delete an existing system directed putaway task type.</b>
Source Zone	Select the source zone where inventory is available.
Target Zone	Select the target zone where you want to move the inventory.
Container Type	Select the container type to be used to move the inventory from the source zone to the target zone. Typical values are Case and Pallet.
Task Type	Select the Putaway Task Type applicable to this putaway strategy. This field displays the list of existing system directed task types that belong to the 'PUTAWAY' activity group.
<b>Ad hoc Task Types</b>	<b>Displays the list of existing ad hoc task types.</b>  <b>You may use  to delete an existing ad hoc task type.</b>
Source Zone	Select the source zone where inventory is available.
Target Zone	Select the target zone where you want to move the inventory.
Container Type	Select the container type to be used to move the inventory from the source zone to the target zone. Typical values are Case and Pallet.
Task Type	Select the Putaway Task Type applicable to this putaway strategy. This field displays the list of existing ad hoc task types that belong to the 'PUTAWAY' activity group.

6.



### 9.2.3.2 Modifying an Activity Constraint for Container

To modify an activity constraint for container:

1. From the tree in the application rules side panel, choose Packing > Activities. The Activity Search window is displayed, with the list of activities.
2. Choose the Activity List whose Activity Constraint is to be set up.
3. Choose . The Activity Constraints window is displayed.
4. In the Activity Constraints window, choose the Container tab. The Container tab window for Activity Constraints is displayed.
5. In the Container tab window, choose the activity constraint that is to be modified.
6. Choose . The Activity Constraint Details window is displayed.
7. Enter information in the applicable fields. For more information about modifying the fields, see [Section 9.2.3.1.1, "Setting Up Activity Constraints for Pallets"](#) on page 772 and [Section 9.2.3.1.2, "Setting Up Activity Constraints for Cases"](#) on page 778.
8. Choose .

### 9.2.3.3 Deleting an Activity Constraint for Container

To delete an activity constraint for container:

1. From the tree in the application rules side panel, choose Packing > Activities. The Activity Search window is displayed, with the list of activities.
2. Choose the Activity List whose Activity Constraint is to be set up.
3. Choose . The Activity Constraints window is displayed.
4. In the Activity Constraints window, choose the Container tab. The Container tab window for Activity Constraints is displayed.
5. In the Container tab window, choose the activity constraint that is to be deleted.
6. Choose .


## 9.3 Defining Putaway Preferences

Inventory being received at the dock require to be putaway to appropriate locations, based on shipment attributes, item classifications and location attributes.

The preferences for putting away of inventory is specified by zone and location storage attributes, for the SKU and container attributes.

For more information on defining a putaway preference, see [Section 8.4, "Defining Putaway Preferences"](#) on page 668.

---

**Note:** Choose  in the top right corner of the Activity Search window to access the Putaway Preferences window.

---

## 9.4 Defining Retrieval Strategy

Retrieval Strategy defines the retrieval process to be followed when retrieving items for Packing. This is defined at the 'Packing' activity group level.

For more information on defining a retrieval strategy, see [Section 8.3, "Defining Retrieval Strategy"](#) on page 653.

---

**Note:** Choose  in the top right corner of the Activity Search window to access the Retrieval Strategy window.

---

## 9.5 Defining Pack Planning

Pack planning is the process of determining the parameters used when performing containerization. *Containerization* is the process of using standardized containers for the storage and transport of loose units from a warehouse. The containers used for containerization are defined in Product Management. For more information about defining containers, see the *Yantra 7x Product Management Configuration Guide*.

If you pack during picking, the results of containerization are used during picking. If you pack after picking, the results of containerization are used during packing.

The actual instance of when the packing should be performed, is specified as part of Task Type configuration in pick planning. This decision


affects the way in which containerization logic works. However, the parameters that govern the logic remain the same regardless of when packing is performed.

Containerization logic is governed by inbound compliance, pack strategy, and node and enterprise level parameters. This section describes the various node and enterprise level parameters governing containerization.

For more information configuring the task type to set up the instance of picking (pack during picking, or pack after picking), see [Section 12.3, "Defining Task Types"](#) on page 887.

For more information about Pick Planning, see [Section 7.2, "Defining Pick Planning Parameters"](#) on page 557.

To define pack planning parameters:

1. From the tree in the application rules side panel, choose Packing > Pack Planning. The Pack Planning window is displayed.
2. Enter information in the applicable fields. Refer [Table 9–12](#) for field value descriptions.
3. Choose .



**Pack Planning ( DEFAULT / MA03 )**

Limit number of SKUs per case to

Do not mix in a case

☐ Customer PO # ☐ Department Code

☐ Item ID ☐ Mark For

☐ Product Class ☐ Unit Of Measure

Do not mix in a pallet

☐ Customer PO # ☐ Department Code

☐ Item ID ☐ Mark For

☐ Product Class ☐ Unit Of Measure

Overpack product under following conditions

Overpack when containerization category is in

And case volume is less than

Containers

Use only these containers

**Parcel Shipments** **Other Shipments**

Shipping Container Marking

☒ SCM not required

☐ SCM required without content

☐ SCM required with content

SCM Label Level

☒ Do not apply SCM

☐ Apply SCM on all cases

☐ Apply SCM on all shipping units (cases or pallets)

Settings for pack after pick process

Containerization is done by system ☐

Only for items with containerization category in

Containerization is performed ☒ Upfront during wave release ☐ While packing, upon request

**Pack Planning ( DEFAULT / MA03 )**


**Table 9–12 Pack Planning Window**

Field	Description
Limit number of SKUs per case to	Enter the maximum number of SKUs that can be packed into a case.
Do not mix in a case	Note: The items with classification purpose 'Container Category Classification' are never mixed in a container, irrespective of the Do Not Mix constraints settings.
Customer PO #	Select this field if you do not want SKUs for shipments with different customer purchase order numbers to be packed into the same case.


**Table 9–12 Pack Planning Window**

Field	Description
Department Code	Select this field if you do not want SKUs for shipments with different department codes to be packed into the same case.
Item ID	Select this field if you do not want SKUs with different item IDs to be packed into the same case.
Mark For	Select this field if you do not want SKUs for shipments with different mark for addresses to be packed into the same case.
Product Class	Select this field if you do not want SKUs with different product classes to be packed into the same case.
Unit of Measure	Select this field if you do not want SKUs with different units of measure to be packed into the same case.
Do not mix in a pallet	Note: The items with classification purpose 'Container Category Classification' are never mixed in a container, irrespective of the Do Not Mix constraints settings.
Customer PO #	Select this field if you do not want SKUs for shipments with different customer purchase order numbers to be packed onto the same pallet.
Department Code	Select this field if you do not want SKUs for shipments with different department codes to be packed onto the same pallet.
Item ID	Select this field if you do not want SKUs with different item IDs to be packed onto the same pallet.
Mark For	Select this field if you do not want SKUs for shipments with different mark for addresses to be packed onto the same pallet.
Product Class	Select this field if you do not want SKUs with different product classes to be packed onto the same pallet.
Unit of Measure	Select this field if you do not want SKUs with different units of measure to be packed onto the same pallet.
Overpack product under following conditions	

Table 9–12 Pack Planning Window

Field	Description
Overpack when containerization category is in	<p>You can specify the containerization categories that you want to allow overpacking for. For more information about containerization categories, see the <i>Yantra 7x Product Management Configuration Guide</i>.</p> <p>Choose . The List of Values pop-up window is displayed. Select the blank line and choose a containerization category from the drop-down menu. When you have finished adding containerization categories, choose OK.</p>
And case volume is less than	Enter the volume that the case volume must be less than, for overpacking to occur for the specified containerization categories.
Containers	
Use only following containers	You can specify the specific containers you want to use for this packing plan.
Parcel Shipments and Other Shipments Tabs	You can specify the parameters for both parcel shipments and other shipments. The fields on both tabs are identical.
Shipping Container Marking	
SCM not required	Select this field if a shipping container marking is not required on a container.
SCM required without content	Select this field if a shipping container marking is required on a container but does not have to describe the contents.
SCM required with content	Select this field if a shipping container marking is required on a container with all applicable information about the contents.
SCM Label Level	
Do not apply SCM	If you selected 'SCM not required', this field is automatically chosen.
Apply SCM on all cases	If you specified that shipment container markings are required, choose this field if you want to apply them on cases only.

**Table 9–12 Pack Planning Window**

Field	Description
Apply SCM on all shipping units (cases or pallets)	If you specified that shipment container markings are required, choose this field if you want to apply them on cases and pallets.
Settings for pack after pick process	
Containerization is done by system	<p>Select this field to indicate that containerization is performed by the system.</p> <p>If this field is not selected, containerization must be done manually.</p> <p><b>Note:</b> When containerization is performed manually, the constraints that you specify in this window are still applied.</p> <p>This field is to be selected if you want the cartonization to be carried out after Picking.</p>
Only for items with containerization category in	<p>You can define containerization settings which will be applicable only for items belonging to the specified containerization category. When an item does not fall under a specified containerization category, then the containerization for that item is done manually.</p> <p>Choose . The List of Values pop-up window is displayed. Select the blank line and choose a containerization category from the drop-down menu. When you have finished adding containerization categories, choose OK.</p>
Containerization is performed	<p>Choose 'Upfront during wave release' if you want containerization to be determined when the system is releasing a wave.</p> <p>Choose 'While packing, upon request' if you want containerization to be determined at the time of packing when requested by the packer.</p>

Over pack is specified for items that have case packs that are smaller than regular outbound containers and can be packed with other items. This reduces the handling charges for the shipment.

## Full Containerization and Loose Containerization

Full Containerization, refers to an instance where CASE or PALLET quantities are picked into a container. Loose Containerization, on the other hand, refers to an instance where loose quantities (even if across SKUs) are picked into the container.

Full Containerization will be done when a Task Type is configured as Pick Full Pallets. For more information configuring the task type, see [Section 12.3, "Defining Task Types"](#) on page 887.

For example, Loose Containerization applies in a scenario where Do Not Mix constraints are set, and Pick Task has been configured to pick into carton or apply labels.

Do not mix constraints will ONLY apply to Loose cartons and NOT to standard case/pallet picks. The system containerization process does not support multi-SKU palletization. It only deals with cartonization for single-SKU/multi-SKU cases and single-SKU pallets.

On the other hand, in an instance where the Do Not Mix Constraints has been set up in Pack Strategy, SCM Required=Y with system containerization, and pick tasks have been set to pick into carton or apply labels, the containers for loose cases, full cases, and full pallets are created.

To undertake Full Containerization using containerizeWave for per-pick scenario, select "Containerization is done by the system" and "Upfront during wave release," in the pack planning setting of pack after pick process.

## Post-Pick Containerization and Pre-Pick Containerization

Post-Pick Containerization is when containerization is done by the system after the Picking process. To set up a containerization as post-pick, you need to select 'Use System Containerization' field, and the 'While packing, upon request' option in 'Containerization is performed' field in the 'Settings for Pack after Pick Process' in the Pack Planning window.

Pre-Pick Containerization is when containerization is done by the system before the Picking process. Pre-Pick Containerization is done when the 'Pack while Pick' and the 'Use System Containerization' fields are checked in the Task Type Wizard, while configuring the Task Type.

For more information configuring the task type, see [Section 12.3, "Defining Task Types"](#) on page 887.

## Shipping Container Marking Settings for Movement of Inventory

The relationship between Shipping Container Marking (SCM) settings and movement of inventory to Ship Sort / Pack Location is illustrated in [Table 9–13](#):

**Table 9–13 Inventory Movement to Ship Sort Location**

Shipping Container Marking	Deposit Location	Inventory Location	Description
SCM not required	Ship Sort Location	Ship Sort Location	In this strategy user has picked the inventory.  Ship Sort Location is suggested as Deposit location. Inventory is also moved to Ship Sort Location.
SCM required without content	Pack Location	Ship Sort Location	In this strategy user has picked the inventory, where Task Type is 'Picking into Equipment'.  Pack Location is suggested as Deposit location. Inventory is physically present at the Pack Location but according to the system it is present in the Ship Sort Location.
SCM required without content	Ship Sort Location	Ship Sort Location	In this strategy user has picked the inventory, where Task Type is 'Picking into Inventory case or pallet'.  Ship Sort Location is suggested as Deposit location. Inventory is moved to Ship Sort Location.
SCM required with content	Pack Location	Pack Location	In this strategy user has picked the inventory.  Pack Location is suggested as Deposit location. Inventory is also moved to Pack Location.

The above mentioned relationship is independent of 'Pack While Picking' settings. When 'Pack While Picking' is set to YES, and the above options are exhausted, the action taken is in accordance with the Container

Routing set up under the Container Pipeline. The order of action undertaken is Next Action Location, Carrier Sort Location, Ship Sort Location, Source Drop Off, and User Override.

## 9.6 Defining Container Build

Containers may be built in a warehouse either during retrieval or picking or after packing is complete. The placing of items or cases into a container is based on the process being employed.

Typically, containers are built to group cases during the manifesting or trailer loading or due to customer (buyer) compliance during the outbound process. Containers are also built to move items or cases or items in the warehouse from one location to another or for pack and hold activities. Therefore, the container build is either for inventory movements referred to as “inventory containers”, or for outbound shipments referred to as “outbound containers”.

The attributes to consider while defining inventory containers or shipping containers are specified here.

## 9.7 Defining Inventory Containers


Inventory containers in Yantra 7x WMS are used to associate multiple cases or items into a pallet to facilitate subsequent putaway and retrieval at the pallet level. Before the manifesting process for parcel shipments, inventory containers may be built to ensure that all containers associated with a shipment are shipped together.

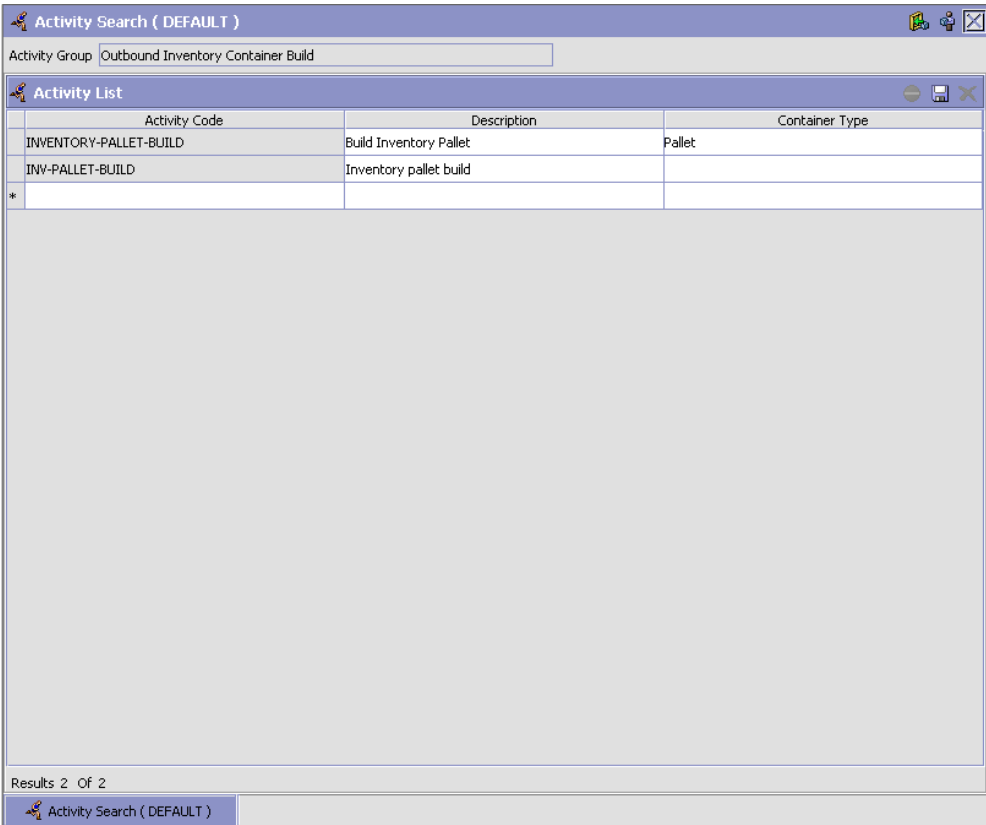
Use Build Inventory Containers for:

- [Creating an Inventory Container](#)
- [Modifying an Inventory Container](#)
- [Deleting an Inventory Container](#)
- [Setting Up Activity Constraints for Inventory Containers](#)
- [Defining Putaway Strategy](#)
- [Defining Retrieval Strategy](#)

9.7.1 Creating an Inventory Container

To create an inventory container:

- 1. From the tree in the application rules side panel, choose Packing > Container Build > Build Inventory Containers. The Activity Search window is displayed.
- 2. Enter information in the applicable fields. Refer [Table 9–14](#) for field value descriptions.
- 3. Choose .





**Table 9–14 Activity Search Window**


Field	Description
Activity Group	This is automatically populated by the system as 'Outbound Inventory Container Build'.
<b>Activity List</b>	
Activity Code	Enter a name for the activity code. Activity code is the unique identity of the activity.
Description	Enter a brief description for the activity code.
Container Type	Choose container type for the activity code. The container type may be Pallet or Case.

The contents of inventory containers are visible either through the Location Inventory console or through the corresponding shipment (pack and hold).

## 9.7.2 Modifying an Inventory Container

Once an inventory container has been created, it can be modified.

To modify an inventory container:

1. From the tree in the application rules side panel, choose Packing > Container Build > Build Inventory Containers. The Activity Search window is displayed with the list of activities.
2. Enter information in the applicable fields. Refer [Table 9–14](#) for field value descriptions.
3. Choose .

*It is recommended that the Yantra 7x WMS provided list of activity codes are not modified.*

## 9.7.3 Deleting an Inventory Container

To delete an inventory container:

1. From the tree in the application rules side panel, choose Packing > Container Build > Build Inventory Containers. The Activity Search window is displayed with the list of activities.
2. Choose the Activity List to be deleted.

3. Choose .


*It is recommended that the Yantra 7x WMS provided list of activity codes are not deleted.*

### 9.7.4 Setting Up Activity Constraints for Inventory Containers

Activities in the warehouse are performed based on attributes of the inventory being received. The attributes considered are single SKU inventory, multi-SKU inventory and container.

Inventory Container is used to specify the constraints for the activity of a container. This also applies to CASE with LPN and PALLET with LPN.

To set up activity constraints for an inventory container:

1. From the tree in the application rules side panel, choose Packing > Container Build > Build Inventory Containers. The Activity Search window is displayed with the list of activities.
2. Choose the Activity List whose Activity Constraint is to be set up.
3. Choose . The Container Build Constraint Details window is displayed.
4. Enter information in the applicable fields. Refer [Table 9–15](#) for field value descriptions.

Container Build Constraint Details : DEFAULT ( MA03 )

Description

	Allow	Do Not Allow	Avoid
Mix Shipment	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Mix Load	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Mix Carrier Service	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Mix SCAC	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Mix Ship Date	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>

Activity Search ( DEFAULT / MA03 )
 Container Build Constraint Details : DEFAULT ( MA03 )

**Table 9–15** Container Build Constraint Details Window

Field	Description
Description	Enter a description for the activity constraint.
	<p><b>Allow</b> – Select if activities with differences in said attributes should be allowed to be mixed.</p> <p><b>Do Not Allow</b> – Select if activities with differences in said attributes should not be allowed to be mixed.</p> <p><b>Avoid</b> – Select if the mixing of activities with differences in said attributes should be avoided. The algorithm first uses the ‘Do Not Allow’ feature, and uses the ‘Allow’ feature if no location is found.</p>

**Table 9–15 Container Build Constraint Details Window**


Field	Description
Mix Shipment	Select if activities belonging to different shipments can be mixed.
Mix Load	Select if activities belonging to different loads can be mixed.
Mix Carrier Service	Select if activities belonging to different carrier services can be mixed.
Mix SCAC	Select if activities belonging to different SCAC can be mixed.
Mix Ship Date	Select if activities belonging to different ship dates can be mixed.

### 9.7.5 Defining Putaway Strategy

Inventory being received at the dock require to be putaway to appropriate locations, based on shipment attributes, item classifications and location attributes.

The preferences for putting away of inventory is specified by zone and location storage attributes, for the SKU and container attributes.


For more information on defining a putaway strategy, see [Section 8.4, "Defining Putaway Preferences"](#) on page 668.

**Note:** Choose  in the top right corner of the Activity Search window to access the Putaway Strategy window.

### 9.7.6 Defining Retrieval Strategy

Retrieval Strategy defines the retrieval process to be followed when retrieving items for Packing. This is defined at the 'Packing' activity group level.

For more information on defining a retrieval strategy, see [Section 8.3, "Defining Retrieval Strategy"](#) on page 653.

**Note:** Choose  in the top right corner of the Activity Search window to access the Retrieval Strategy window.

## 9.8 Defining Shipping Containers

Outbound (shipping) containers are built to customer (buyer) or carrier or warehouse process requirements. Containers are normally built considering shipments or loads or the pack and hold date of a shipment. Buyer compliance requirements including mixing of mark-for, customer purchase orders are also considered.


The temporary building of pack and hold containers, before the actual shipping of shipment, is considered as inventory containers. For more information about Inventory Containers, see [Section 9.7, "Defining Inventory Containers"](#) on page 793.

Use Build Shipping Containers for:

- [Creating a Shipping Container](#)
- [Modifying a Shipping Container](#)
- [Deleting a Shipping Container](#)
- [Setting Up Activity Constraints for Shipping Containers](#)
- [Defining Putaway Strategy](#)
- [Defining Retrieval Strategy](#)

### 9.8.1 Creating a Shipping Container

To create a shipping container:

1. From the tree in the application rules side panel, choose Packing > Container Build > Build Shipping Containers. The Activity Search window is displayed.
2. Enter information in the applicable fields. Refer [Table 9–16](#) for field value descriptions.
3. Choose .

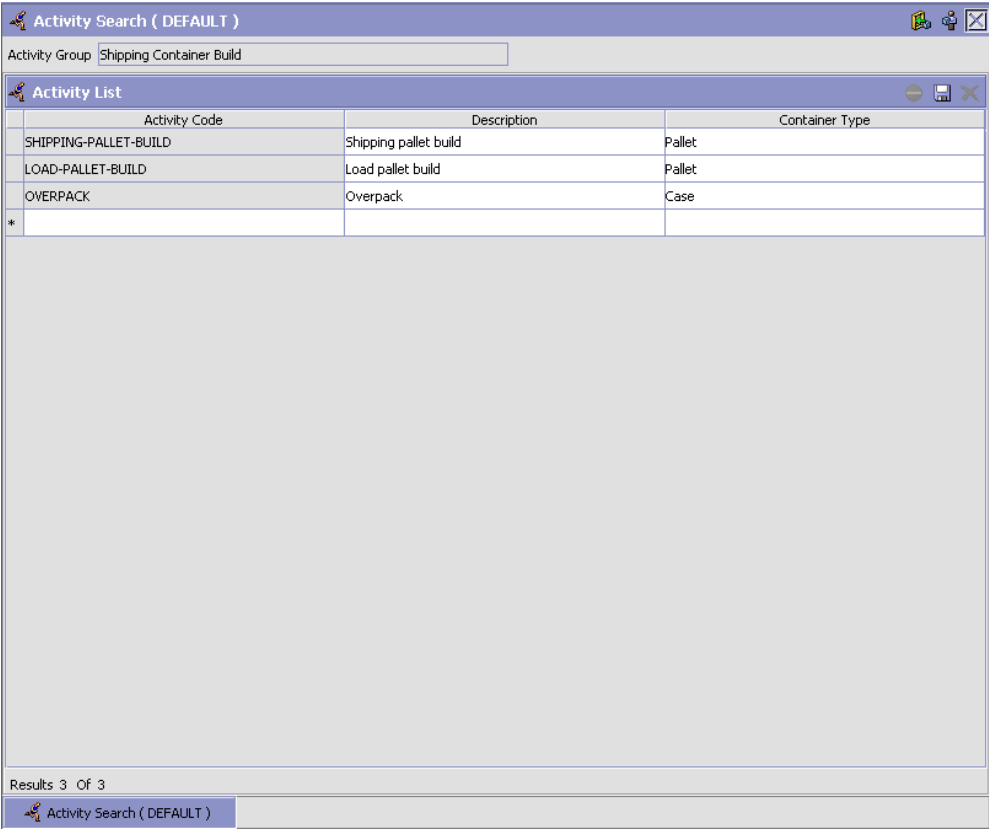


Table 9–16 Activity Search Window

Field	Description
Activity Group	This is automatically populated by the system as 'Shipping Container Build'.
<b>Activity List</b>	
Activity Code	Enter a name for the activity code. Activity code is the unique identity of the activity.

**Table 9–16 Activity Search Window**


Field	Description
Description	Enter a brief description for the activity code.
Container Type	Choose container type for the activity code. The container type may be Pallet or Case.

The contents of inventory containers are visible either through the Location Inventory console or through the corresponding shipment (pack and hold).

## 9.8.2 Modifying a Shipping Container

Once a shipping container has been created, it can be modified.


To modify a shipping container:

1. From the tree in the application rules side panel, choose Packing > Container Build > Build Shipping Containers. The Activity Search window is displayed with the list of activities.
2. Enter information in the applicable fields. Refer [Table 9–16](#) for field value descriptions.
3. Choose .

*It is recommended that the Yantra 7x WMS provided list of activity codes are not modified.*

## 9.8.3 Deleting a Shipping Container

To delete a shipping container:

1. From the tree in the application rules side panel, choose Packing > Container Build > Build Shipping Containers. The Activity Search window is displayed with the list of activities.
2. Choose the Activity List to be deleted.
3. Choose .



*It is recommended that the Yantra 7x WMS provided list of activity codes are not deleted.*

## 9.8.4 Setting Up Activity Constraints for Shipping Containers

Activities in the warehouse are performed based on attributes of the inventory being received. The attributes considered are single SKU inventory, multi-SKU inventory and container.

Shipping Container is used to specify the constraints for the activity of a container. This also applies to CASE with LPN and PALLET with LPN.

To set up activity constraint for a shipping container:

1. From the tree in the application rules side panel, choose Packing > Container Build > Build Shipping Containers. The Activity Search window is displayed with the list of activities.
2. Choose the Activity List whose Activity Constraint is to be set up.
3. Choose . The Container Build Constraint Details window is displayed.
4. Enter information in the applicable fields. Refer [Table 9–17](#) for field value descriptions.
5. Choose .



Container Build Constraint Details : DEFAULT ( MA03 )

Description

	Allow	Do Not Allow	Avoid
Mix Shipment	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Mix Load	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Mix Carrier Service	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Mix SCAC	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
Mix Ship Date	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>

Activity Search ( DEFAULT / MA03 )
 Container Build Constraint Details : DEFAULT ( MA03 )

**Table 9–17** Container Build Constraint Details Window

Field	Description
Description	Enter a description for the activity constraint.
	<p><b>Allow</b> – Select if activities with differences in said attributes should be allowed to be mixed.</p> <p><b>Do Not Allow</b> – Select if activities with differences in said attributes should not be allowed to be mixed.</p> <p><b>Avoid</b> – Select if the mixing of activities with differences in said attributes should be avoided. The algorithm first uses the 'Do Not Allow' feature, and uses the 'Allow' feature if no location is found.</p>

**Table 9–17 Container Build Constraint Details Window**


Field	Description
Mix Shipment	Select if activities belonging to different shipments can be mixed.
Mix Load	Select if activities belonging to different loads can be mixed.
Mix Carrier Service	Select if activities belonging to different carrier services can be mixed. <b>Note:</b> This is applicable only for inventory containers.
Mix SCAC	Select if activities belonging to different SCAC can be mixed. <b>Note:</b> This is applicable only for inventory containers.
Mix Ship Date	Select if activities belonging to different ship dates can be mixed.

### 9.8.5 Defining Putaway Strategy

Inventory being received at the dock require to be putaway to appropriate locations, based on shipment attributes, item classifications and location attributes.

The preferences for putting away of inventory is specified by zone and location storage attributes, for the SKU and container attributes.


For more information on defining a putaway strategy, see [Section 8.4, "Defining Putaway Preferences"](#) on page 668.

**Note:** Choose  in the top right corner of the Activity Search window to access the Putaway Strategy window.

### 9.8.6 Defining Retrieval Strategy

Retrieval Strategy defines the retrieval process to be followed when retrieving items for Packing. This is defined at the 'Packing' activity group level.

For more information on defining a retrieval strategy, see [Section 8.3, "Defining Retrieval Strategy"](#) on page 653.

**Note:** Choose  in the top right corner of the Activity Search window to access the Retrieval Strategy window.

## 9.9 Defining Pack Modification Rules




Most order document types flow through a pipeline without requiring any intervention by a customer service representative. However, there are times when modifications are required, such as changing credit card information or quantity. Yantra 7x supports modifications through the Yantra 7x Application Consoles and APIs. It is critical for you to decide which modifications are allowed for each modification type, modification level, and status combination.

**Important:** Contemplate business and system integration implications before allowing a modification that is disallowed as part of the system defaults.

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

### 9.9.1 Setting Up Pack Modification Rules

To set up pack modification rules:

1. From the tree in the application rules side panel, choose Packing > Pack Process > Pack Modification Rules. The Modification Rules window is displayed.
2. In the Modification Rules window, select the Pack Process whose Modification Rule is to be set. Refer [Table 9–18](#) for field value descriptions.
3. Choose  to allow order modification.
4. Choose  to disallow order modification.
5. Choose  to ignore order modification.

For more information about defining and changing modification rules, see *Yantra 7x Distributed Order Management Configuration Guide*.

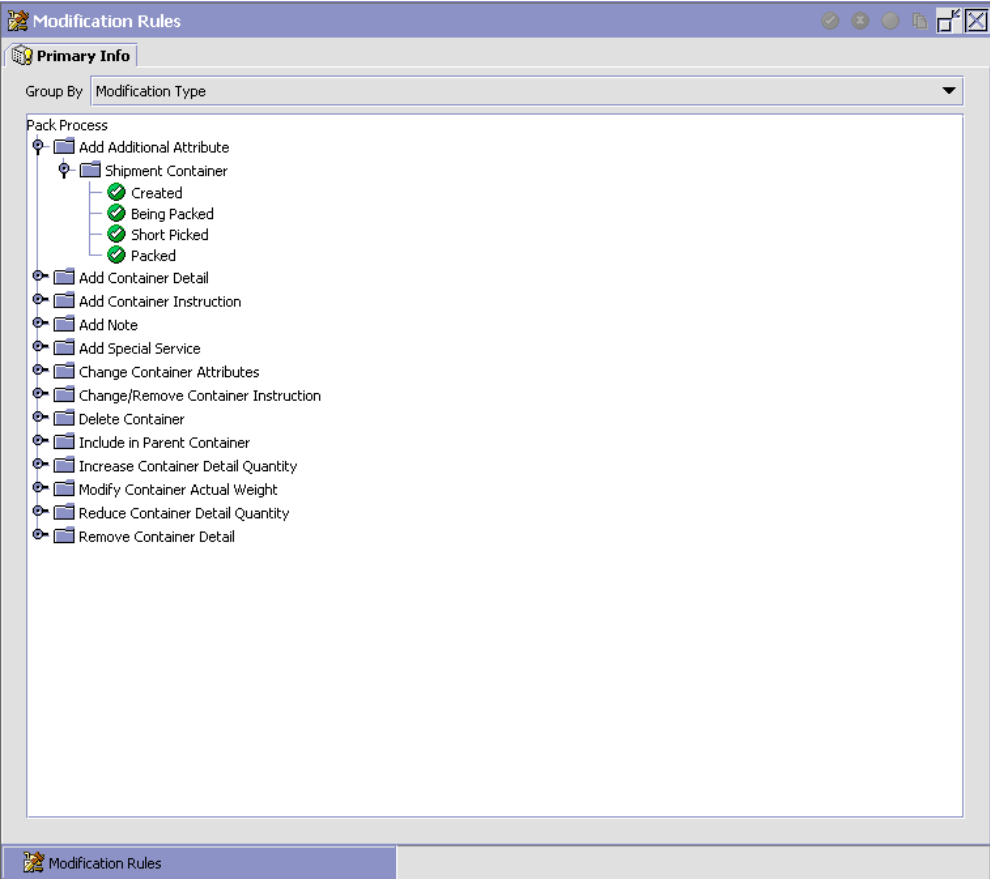


Table 9–18 Modification Rules Window

Field	Description
Primary Info	
Group by	View the Pack Modification Rules grouped by Modification Type, Modification Level, or by Status.
Modification Type	<b>Pack Modification Rules grouped by Modification Type. Statuses are displayed grouped by Modification Level for each Modification Type.</b>

**Table 9–18 Modification Rules Window**

Field	Description
Add Additional Attribute	Allow or Disallow or Ignore modification type appropriately.
Add Container Detail	Allow or Disallow or Ignore modification type appropriately.
Add Container Instruction	Allow or Disallow or Ignore modification type appropriately.
Add Note	Allow or Disallow or Ignore modification type appropriately.
Add Special Service	Allow or Disallow or Ignore modification type appropriately.
Change Container Attribute	Allow or Disallow or Ignore modification type appropriately.
Change/Remove Container Instruction	Allow or Disallow or Ignore modification type appropriately.
Delete Container	Allow or Disallow or Ignore modification type appropriately.
Include in Parent Container	Allow or Disallow or Ignore modification type appropriately.
Increase Container Detail Quantity	Allow or Disallow or Ignore modification type appropriately.
Modify Container Actual Weight	Allow or Disallow or Ignore modification type appropriately.
Reduce Container Detail Quantity	Allow or Disallow or Ignore modification type appropriately.
Remove Container Detail	Allow or Disallow or Ignore modification type appropriately.
Modification Level	<b>Pack Modification Rules grouped by Modification Level. Statuses are displayed grouped by Modification Type for each Modification Level.</b>
Shipment Container	Allow or Disallow or Ignore modification level appropriately.
Status	<b>Pack Modification Rules grouped by Status. Modification Types are displayed grouped by Modification Level for each Modification Type.</b>

For more information about Modification Rules, see *Yantra 7x Distributed Order Management Configuration Guide*.

## 9.10 Defining Pack Process Type Details

Pack Process Type Details define parameters and templates that distinguish a process type.

A **process type pipeline** is a series of transactions and statuses that guide document types, such as a Return Order, through a predefined process. A pipeline consists of the different statuses a document goes through during fulfillment, negotiation, shipment, or receipt. You can also set up transactions consisting of events, actions, and conditions, as they pertain to the pipeline you are configuring.

### Repositories

A repository is a logical collection of entities that define the business process workflow.

The following entities are included in a repository:

- Pipelines
- Transactions
- Statuses
- Conditions
- Actions
- Services

Yantra 7x provides a base repository for each of the system defined process types. Some of the entities within a repository are copied when creating a new document type. For more information about creating a new document type, see the *Yantra 7x Platform Configuration Guide*.

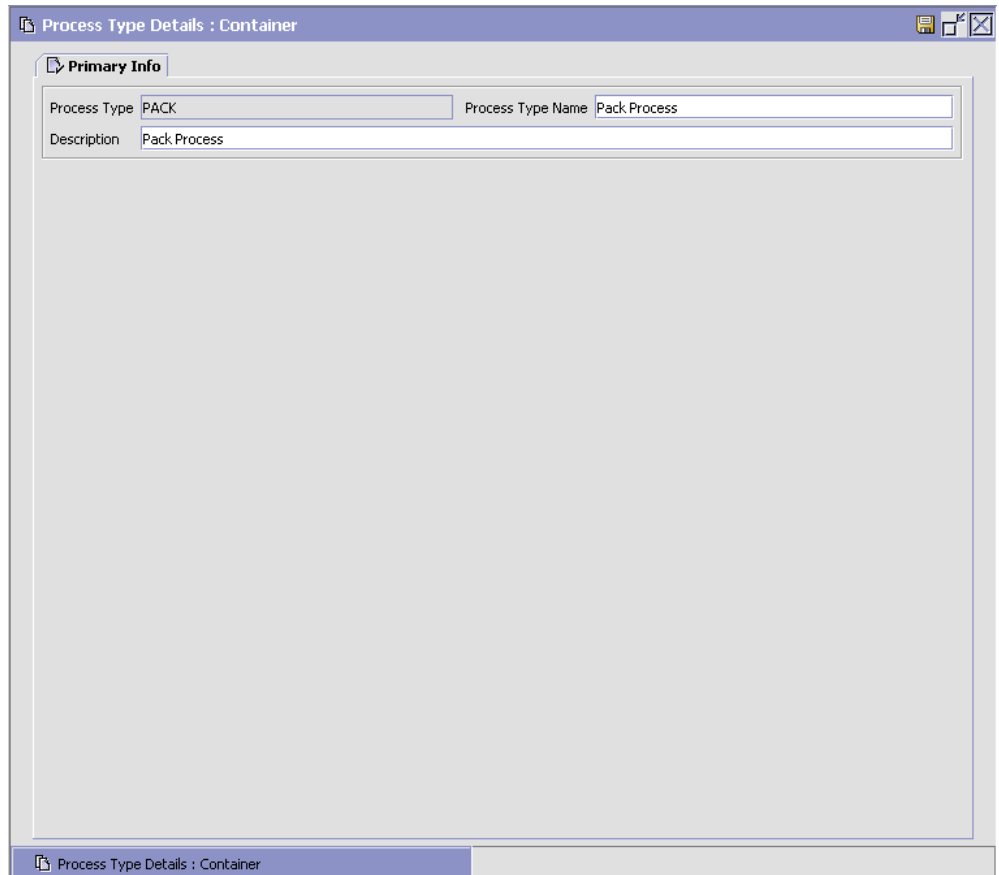
For more information about defining process type details, see *Yantra 7x Platform Configuration Guide*.

### 9.10.1 Viewing Pack Process Type Details

To view pack process type details:

1. From the tree in the application rules side panel, choose Packing > Pack Process > Pack Process Type Details. The Process Type Details : Container window is displayed.
2. Primary information of the Process Type is displayed in the applicable fields. Refer [Table 9–19](#) for field value descriptions.

For more information about defining the primary information for process type details, see *Yantra 7x Platform Configuration Guide*.



The screenshot shows a software window titled "Process Type Details : Container". Inside the window, there is a tab labeled "Primary Info". Below the tab, there are three input fields arranged in two rows. The first row contains "Process Type" with the value "PACK" and "Process Type Name" with the value "Pack Process". The second row contains "Description" with the value "Pack Process". The rest of the window area is a large, empty light gray rectangle. At the bottom of the window, there is a status bar that also displays "Process Type Details : Container".

Process Type	PACK	Process Type Name	Pack Process
Description	Pack Process		

**Table 9–19 Process Type Details : Container Window**

Field	Description
<b>Primary Info</b>	
Process Type	This is automatically populated by the system as "PACK".
Process Type Name	This indicates the name of the process type.
Description	This provides a brief description for the process type.

## 9.11 Defining Pack Process Model

The pack process is modeled through a pipeline. This represents the process configuration that is unique to a warehouse. A warehouse may also specify unique processes for each participating enterprise.

For example, a warehouse that performs ticketing for outbound shipments after pick and pack into a carton is complete.

### 9.11.1 Pipeline Determination

**Pipeline determination** is used to set up conditions that affect which pipeline is used during the start of the business process workflow. For example, an organization deals with sales orders that sometimes contain hazardous materials. They have two separate pipelines, one in which orders with order lines without any hazardous materials go through and one in which orders with order lines containing hazardous materials must go through for inspection before continuing through the order process. The organization uses pipeline determination to set up a condition that determines whether or not order lines contain hazardous materials and sends the order line down the correct pipeline.

For more information about Pipeline Determination, see *Yantra 7x Platform Configuration Guide*.

### 9.11.2 Hub Rule

When you expand the Pipeline Determination branch, the components displayed depends on what role you are logged in as. If you are logged in as a Hub role, the Hub Rule is displayed. If you are logged in as an Enterprise role, both the Hub Rule and all user created determination



rules (For example, My Rule) components are displayed. Double-click on the applicable rule to display the pipeline determination rules.

---

**Note:** If you are logged in as an Enterprise role, the Hub Rule screen is grayed out and cannot be modified.

---

Drag conditions and pipelines into the work area to construct pipeline determination rules. A single pipeline or condition must be the root. Conditions cannot link back to an earlier component in the chain and a pipeline cannot be linked to twice.

---

**Note:** When configuring pipeline determination for an order document type pipeline, please note that pipeline determination is only considered when adding a line or creating an order. When changes are made to draft orders pipeline determination does not occur.

---

### 9.11.2.1 Condition Variables for Pipeline Determination

When using conditions for pipeline determination, the following condition variables can be used:

#### Node Attributes

- Ship Node
- Receiving Node
- Ship from Ship Node Interface Type
- Ship from Supplier Code
- Ship from DCM Integration Real Time
- Ship from Country
- Ship to Ship Node Interface Type
- Ship to Supplier Code
- Ship to DCM Integration Real Time
- Ship to Country

### Organization Attributes

- Enterprise Code
- Buyer Organization Code
- Seller Organization Code

### Shipment Attributes

- Ship Mode
- Carrier Type
- Carrier
- Freight Terms
- Delivery Code
- Pack and Hold
- Shipment Container Count
- Is Shipment Containerized

### Container Attributes

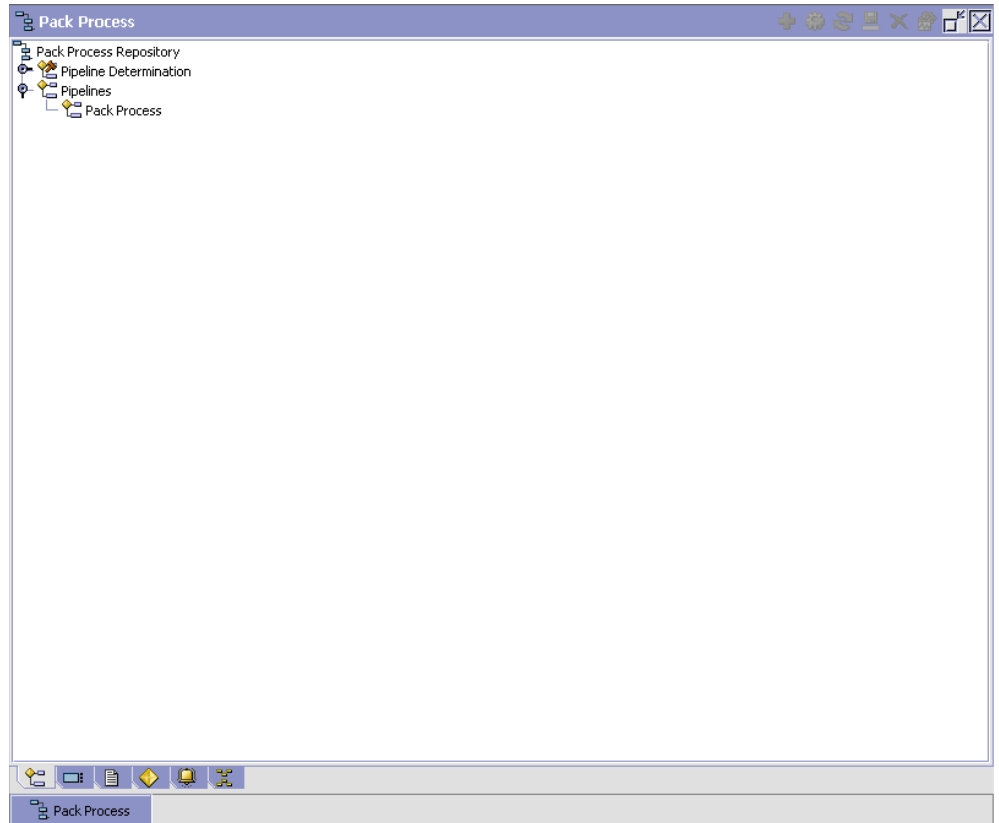
- Is Shipment Container
- Is Load Container
- Is Inventory Pallet
- Is Converted From LPN
- Is Serial Capture Pending
- Is Pack Process Complete
- Is Product Placing Complete
- Requires VAS
- Has Child Containers
- Number of Items
- Container Type

For more information about Pipeline Determination and Hub Rule, see *Yantra 7x Platform Configuration Guide*.

### 9.11.3 Pipelines

To view the pack pipeline details:

1. From the tree in the application rules side panel, choose Packing > Pack Process > Pack Process Model. The Pack Process window is displayed.

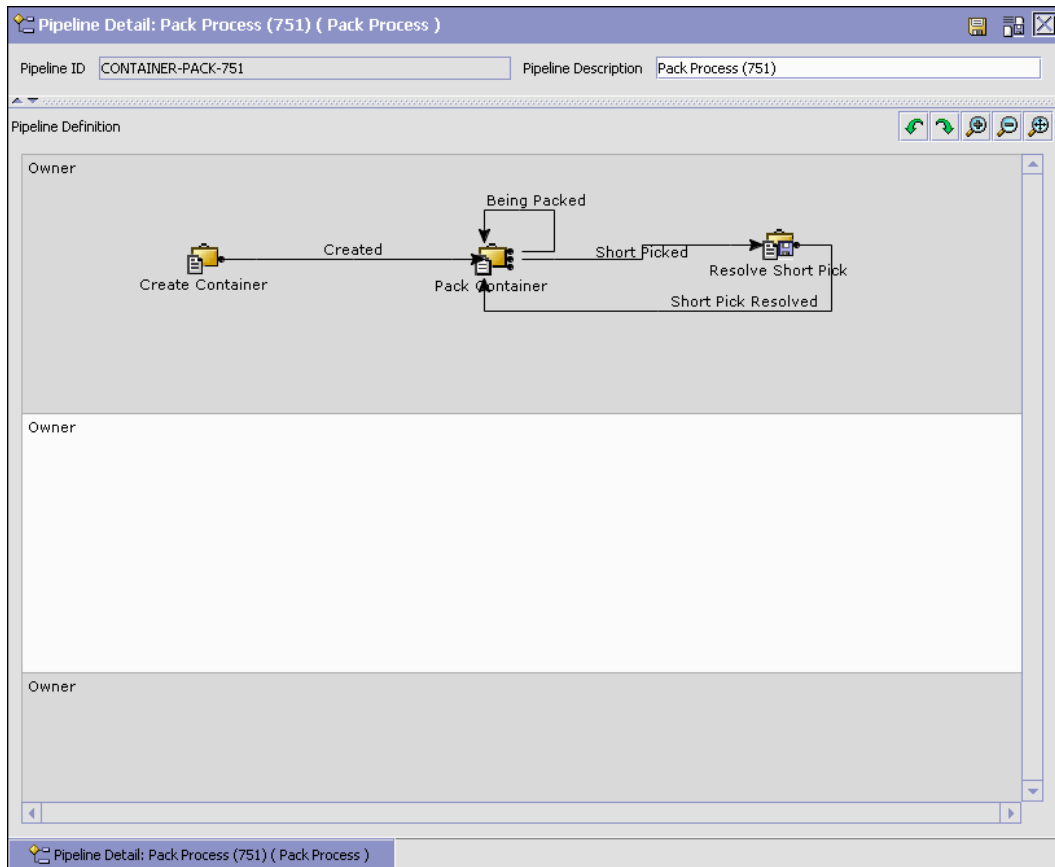


2. In the Pack Process window, choose Pack Process Repository > Pipelines > Pack Process.
3. The Pipeline Detail: Pack Process (Pack Process) window is displayed.

After packing a container, if you want to perform a VAS operation, extend the pack pipeline and add the new extended status with the Requires VAS container attribute connected to the listener. To perform the VAS

operation, the system automatically creates a work order. On completion of VAS, the container status changes to Packed.

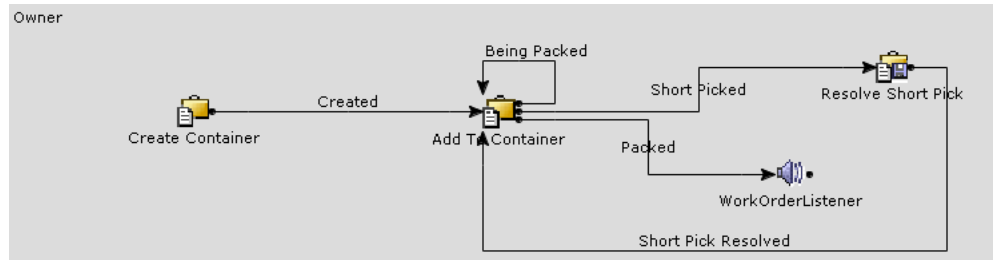
For more information about creating and modifying a pipeline, see the *Yantra 7x Platform Configuration Guide*.



### Post-Pick Value Added Services Configuration Settings

For Post-Pick Value Added Services to happen, the buyer-compliance for the same should be defined, with a service definition associated with it. Again, the 'Container pipeline' should have a 'listener' (that listens to the valid status of the work order) to create a work order for the container.

Typically, the pipeline should be as follows:



For more information about value added services, see the *Yantra 7x Warehouse Management System Concepts Guide*.

For more information about configuring value added services, see [Section 8, "Configuring Value Added Services"](#) on page 625.


For more information about Configuring Pipeline components, see *Yantra 7x Platform Configuration Guide*.

## 9.11.4 Transactions

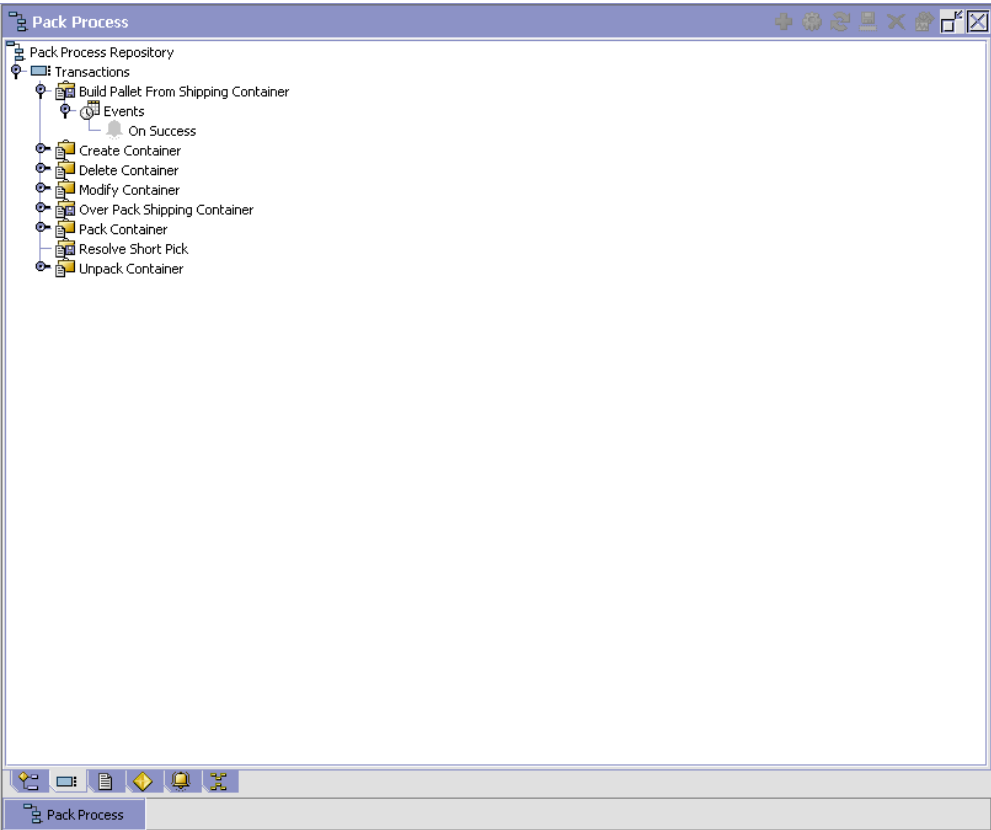
Every process type has a set of base transactions defined for it. A transaction is a logical unit of work that is necessary for performing activity within Yantra 7x. Base transactions are predefined transactions that contain information about how the transaction behaves, such as how many copies of a transaction can be kept in a process type and whether or not it can have configurable base pick and drop statuses. Base transactions can be used to create new transactions. These transactions can be changed within the limits defined in the base transaction.

For more information about Transactions, see *Yantra 7x Platform Configuration Guide*.

To view the transaction details for a pack pipeline:

1. From the tree in the application rules side panel, choose Packing > Pack Process > Pack Process Model. The Pack Process window is displayed.
2. In the Pack Process window, choose .
3. The Transactions tab window is displayed.

For more information about creating and modifying Transactions, see *Yantra 7x Platform Configuration Guide*.



**Table 9–20 Pack Process Pipeline - Transactions Tab Window**

Field	Description
Build Pallet From Shipping Container	This transaction represents that a pallet can be built from the shipping containers.
Create Container	This transaction represents the creation of container that is used for packing of shipment. This applies to warehouses that do 'post-pick containerization'.

**Table 9–20 Pack Process Pipeline - Transactions Tab Window**


Field	Description
Delete Container	This transaction represents that container contents can be deleted.
Modify Container	This transaction represents that container level or attributes can be modified.
Overpack Shipping Container	This transaction represents that the shipping containers can be overpacked.
Pack Container	This transaction represents that container contents can be packed.
Resolve Short Pick	This transaction represents that the shipment for packing has been short picked, and can be resolved.
Unpack Container	This transaction represents that container contents can be unpacked.

## 9.11.5 Statuses

**Statuses** are the actual states that a document moves through in the pipeline. A transaction can contain two types of statuses, a drop status and a pickup status. A document is moved into a **drop status** when the events and conditions of a transaction have been completed. A **pickup status** takes the document from the previous drop status and moves it through the next transaction. Created and Scheduled are examples of statuses.

For more information about Statuses, see *Yantra 7x Platform Configuration Guide*.

To view the status details of a pack pipeline:

1. From the tree in the application rules side panel, choose Packing > Pack Process > Pack Process Model. The Pack Process window is displayed.
2. In the Pack Process window, choose .
3. The Statuses tab window is displayed.

For more information about creating and modifying Statuses, see *Yantra 7x Platform Configuration Guide*.

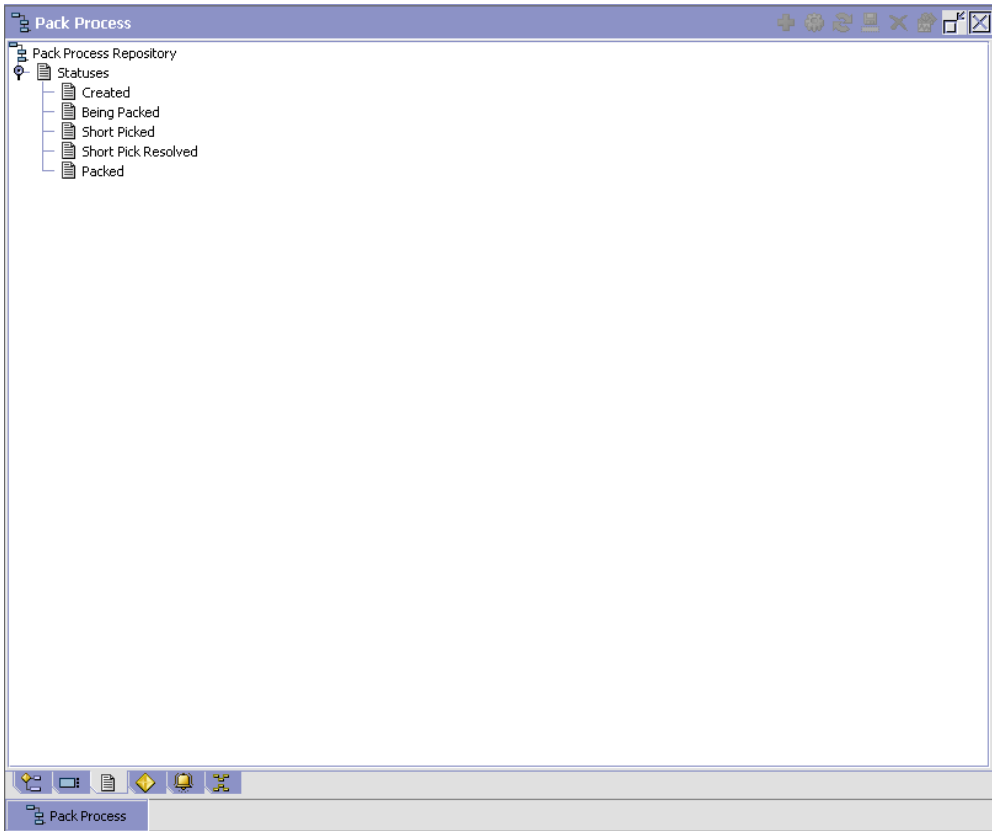


Table 9–21 Pack Process Pipeline - Statuses Tab Window

Field	Description
Created	This indicates that the shipment is opened for packing. This corresponds to 'Create Container' transaction.
Being Packed	This indicates that the packing of the shipment is in progress. This corresponds to 'Add to Container' transaction.



**Table 9–21 Pack Process Pipeline - Statuses Tab Window**


Field	Description
Short Picked	This indicates that the shipment for packing has been short picked.  This corresponds to exceptions being reported on a container during the pick pipeline process transaction.
Short Pick Resolved	This indicates that the short pick exception has been resolved.  This corresponds to 'Resolve Short Pick' transaction.
Packed	This indicates that packing for the shipment is complete.  This corresponds to the 'Close Container' action from the pack station.

## 9.11.6 Conditions

A **condition** matches document type attributes against decision points and routes the documents to different paths based on the specified attribute and value combinations. The document type attributes against which conditions can be created are predefined in Yantra 7x. You can use these attributes in any combination or you can create conditions that execute the appropriate application logic for specific circumstances.

For more information about Conditions, see *Yantra 7x Platform Configuration Guide*.

To view the condition details of a pack pipeline:

1. From the tree in the application rules side panel, choose Packing > Pack Process > Pack Process Model. The Pack Process window is displayed.
2. In the Pack Process window, choose .
3. The Conditions tab window is displayed.

For more information about creating and modifying Conditions, see *Yantra 7x Platform Configuration Guide*.

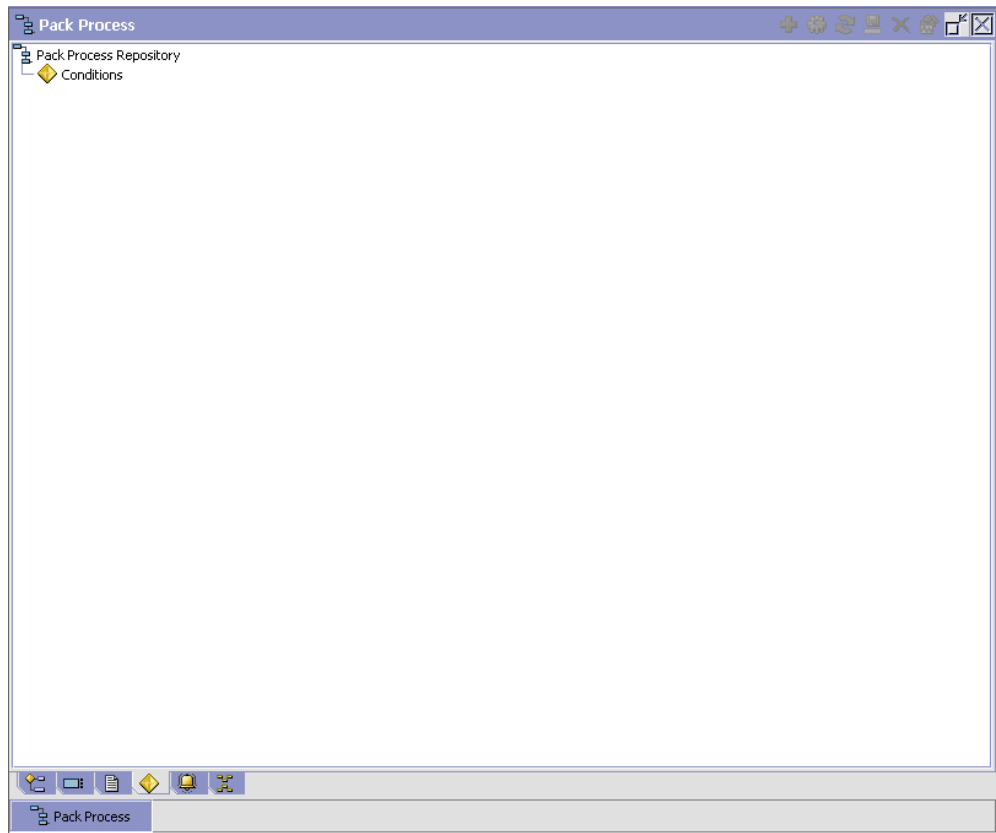


Table 9–22 Pack Process Pipeline - Conditions Tab Window

Field	Description
Conditions	Displays conditions that are specific to the pack process pipeline, if any.

Yantra 7x WMS default pipeline does not have any conditions specified.


### 9.11.7 Actions

An **action** is a process or program that is triggered by an event. These processes and programs send user alert notifications and automatically resolve issues.

For example, when an order is released (the event), you can set an action to send the customer an e-mail.

For more information about Actions, see *Yantra 7x Platform Configuration Guide*.

To view the action details of a pack pipeline:

1. From the tree in the application rules side panel, choose Packing > Pack Process > Pack Process Model. The Pack Process window is displayed.
2. In the Pack Process window, choose .
3. The Actions tab window is displayed.

For more information about viewing the action details, see [Section 3.12.3, "Actions"](#).


For more information about creating and modifying Actions, see *Yantra 7x Platform Configuration Guide*.

### 9.11.8 Service Definitions

Service definitions are a representation of the logic that regulates document workflow services. The Service Builder is a graphical interface that enables you to create a graphical representation of these *services*.

For more information about Service Definitions, see *Yantra 7x Platform Configuration Guide*.

To view the service definition details of a pack pipeline:

1. From the tree in the application rules side panel, choose Packing > Pack Process > Pack Process Model. The Pack Process window is displayed.
2. In the Pack Process window, choose .
3. The Service Definitions tab window is displayed.

For more information about creating and modifying Service Definitions, see *Yantra 7x Platform Configuration Guide*.

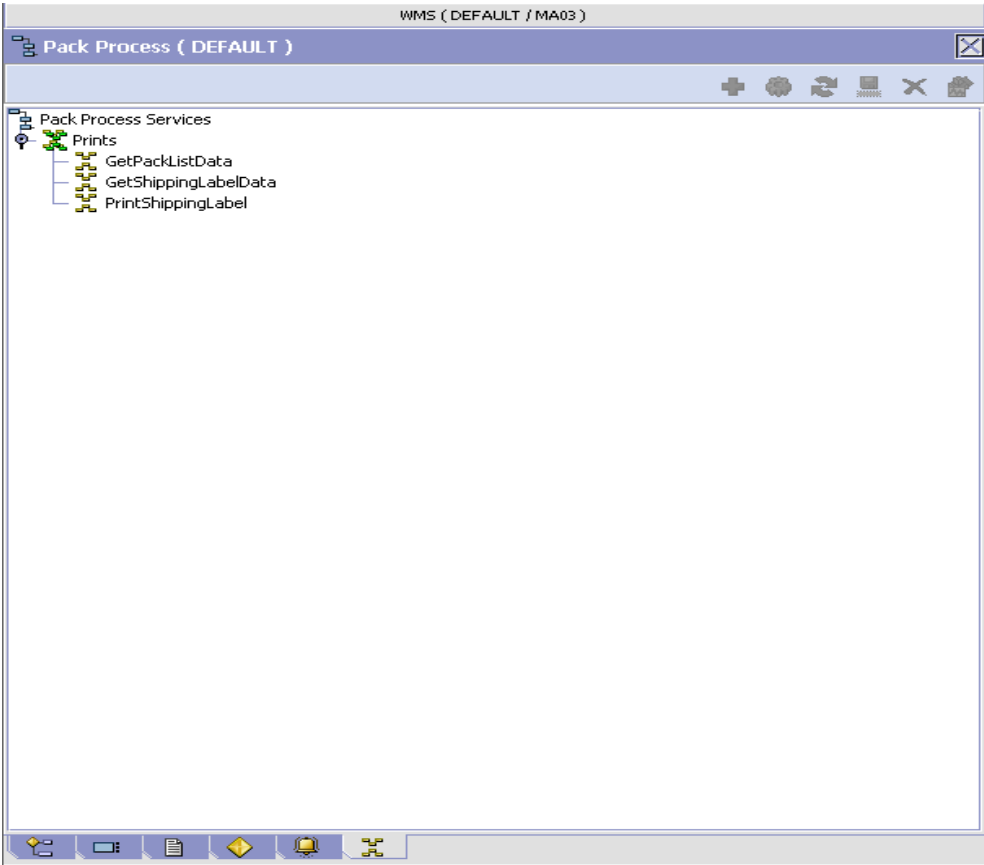


Table 9–23 Pack Process Pipeline - Service Definition Tab Window

Field	Description
GetPackListData	The print service for getting the data required to print a Pack List.
GetShippingLabelData	The print service for getting the data required to print a Shipping Label.
PrintShippingLabel	The Print service for printing a Shipping Label.

# 10

## Configuring Shipping

---

Shipping defines the process to be followed after the completion of the Packing and VAS processes. For example, shipping activities include trailer loading and manifesting.

The activities relating to the ship and load process are specified here.

Use Shipping for:

- [Defining Customers](#)
- [Defining Activities](#)
- [Defining Parcel Carrier Preferences](#)
- [Defining LTL Carrier Preferences](#)
- [Defining Shipping Modification Rules](#)
- [Defining Shipping Process Type Details](#)
- [Defining Shipping Process Model](#)
- [Defining Load Modification Rules](#)
- [Defining Load Process Type Details](#)
- [Defining Load Process Model](#)

### 10.1 Defining Customers

You can define the customers that buy from an organization.

Use Customer for:

- [Defining Customer Classifications](#)
- [Defining Customer Definitions](#)

### 10.1.1 Defining Customer Classifications

You can configure the customer classification codes to associate with a customer identification master. For more information about creating a customer identification master, see [Section 10.1.2, "Defining Customer Definitions"](#) on page 837.

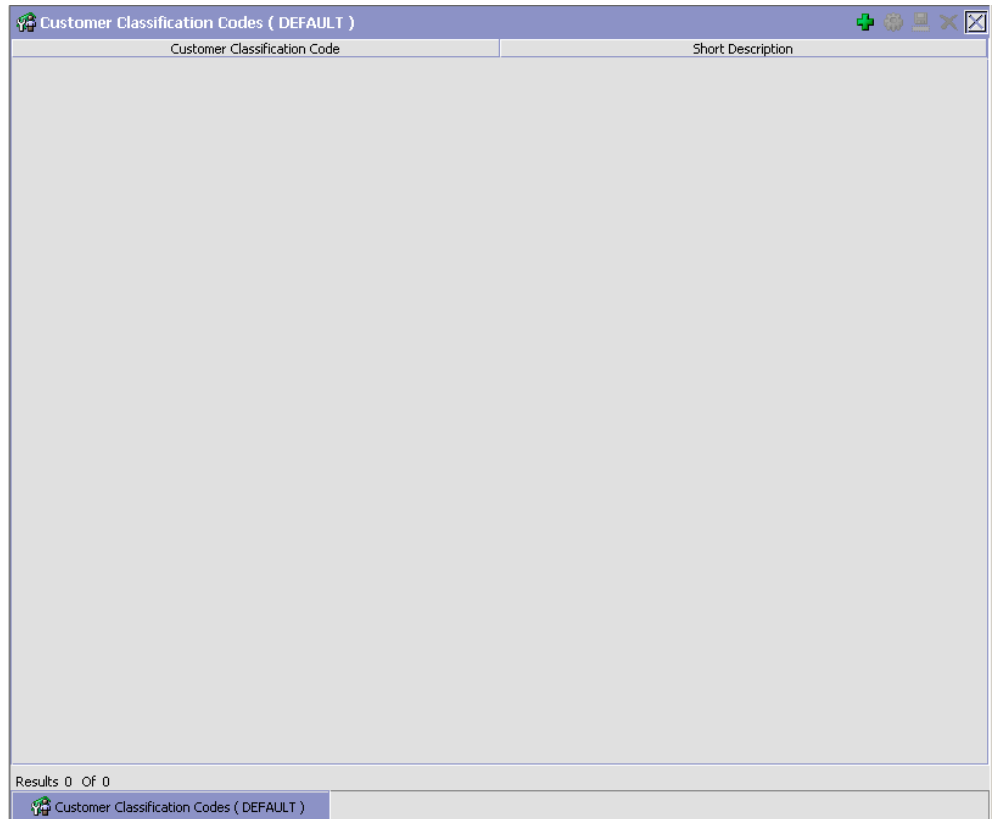
Use Customer Classification for:


- [Creating a Customer Classification](#)
- [Modifying a Customer Classification](#)
- [Deleting a Customer Classification](#)

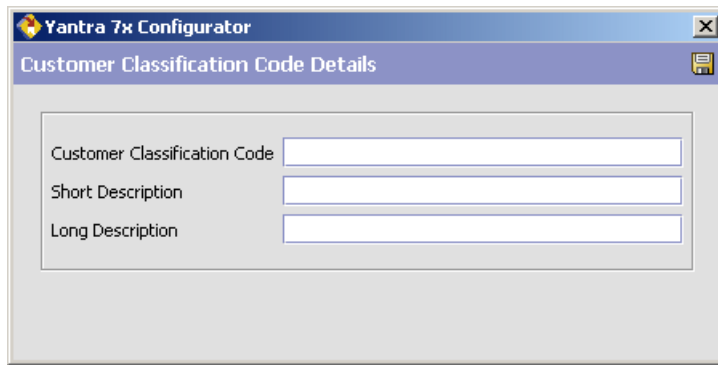
#### 10.1.1.1 Creating a Customer Classification

To create a customer classification:


1. From the tree in the application rules side panel, choose Shipping > Customer > Customer Classification. The Customer Classification Codes window appears in the work area.



2. Choose . The Customer Classification Code Details pop-up window appears.





The screenshot shows a window titled "Yantra 7x Configurator" with a subtitle "Customer Classification Code Details". Inside the window, there are three text input fields arranged vertically. The first field is labeled "Customer Classification Code", the second is labeled "Short Description", and the third is labeled "Long Description". Each label is to the left of its corresponding input field. The window has standard Windows-style window controls (minimize, maximize, close) in the top right corner.

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

### 10.1.1.2 Modifying a Customer Classification


To modify a customer classification:

1. From the tree in the application rules side panel, choose Shipping > Customer > Customer Classification. The Customer Classification Codes window appears in the work area.
2. Select the applicable customer classification code and choose . The Customer Classification Code Details pop-up window appears.
3. In Short Description, enter a brief description of the classification ID code.
4. In Long Description, enter a more detailed description of the classification ID code.
5. Choose .

### 10.1.1.3 Deleting a Customer Classification

To delete a customer classification:



1. From the tree in the application rules side panel, choose Shipping > Customer > Customer Classification. The Customer Classification Codes window appears in the work area.
2. Select the applicable customer classification code and choose .

## 10.1.2 Defining Customer Definitions

You can configure the customer definitions that establish a relationship between an organization and its Buyers. When creating a customer definition, you associate an existing Buyer organization with a specific customer ID and classification. The customer identification uniquely identifies the Buyer organization in instances where multiple ERP systems download Buyer information into Yantra 7x.

Use Customer Definition for:

- [Creating a Customer Definition](#)
- [Modifying a Customer Definition](#)
- [Deleting a Customer Definition](#)

### 10.1.2.1 Creating a Customer Definition



To create a customer definition:

1. From the tree in the application rules side panel, choose Shipping > Customer > Customer Definition. The Customer Search window appears in the work area.

The screenshot shows a software window titled "Customer Search ( DEFAULT )". It contains several input fields: "Customer ID" with a dropdown arrow, an empty text box, and "Organization" with a dropdown arrow. Below these is "Customer Classification" with a dropdown arrow and a green plus icon. To the right of the plus icon is a "Max Records" field with the value "1000". At the bottom left of the window, it says "Results 0 Of 0".

Search Results

Customer ID	Organization	Customer Classification
-------------	--------------	-------------------------

2. Choose . The Customer pop-up window appears.
3. Enter information into the applicable fields. Refer to [Table 10–1](#) for field value descriptions.
4. Choose .

**Yantra 7x Configurator**  
**Create Customer**

☒ This Customer Is A Business
 ☐ This Customer Is A Consumer

Customer ID 
 Customer Classification

☐ Select An Existing Organization

☒ Create A New Organization

Organization Code 
 Organization Name

☐ This Organization Is Also A Ship To

DUNS Number 
 Account Number With Hub

Locale

**Table 10–1 Customer Pop-Up Window**


Field	Description
This Customer Is a Business	Select this if the customer with whom you trade participates as a company (as in a B2B scenario). If you choose this option, see Business Customer Details in this table for further information specific to this scenario.
This Customer Is a Consumer	Select this if the customer with whom you trade participates as an individual (as in a B2C scenario). If you choose this option, see Business Customer Details in this table for further information specific to this scenario.



**Table 10–1 Customer Pop-Up Window**

Field	Description
Customer ID	Enter the unique ID.
Customer Classification	Select the classification, if applicable.
Business Customer Details	
Select Existing Organization	Choose this and select the applicable Buyer if you want to associate the customer ID with an existing Buyer organization.
Create A New Organization	Choose this if you want to create a new organization to associate with the customer.
Organization Code	If you chose Create Buyer Organization, enter the Buyer's organization code.
Organization Name	When creating a new organization, enter the Buyer's organization name.
This Organization Is Also a Ship To	When creating a new organization, choose this if the organization also functions as a receiving node.
DUNS Number	If you chose Create Buyer Organization, enter the Buyer's DUNS number.
Account Number With Hub	If you chose Create Buyer Organization, enter the Buyer's account number with the Hub organization.
Locale	If you chose Create Buyer Organization, select the Buyer's locale.
Consumer Address Details	
Address	Enter the consumer's name and shipping address here.
Contact Info	Enter the consumer's telephone, cell phone, fax number, and e-mail address.

### 10.1.2.2 Modifying a Customer Definition



To modify a customer definition:

1. From the tree in the application rules side panel, choose Shipping > Customer > Customer Definition. The Customer Search window appears in the work area.
2. Enter applicable search criteria and choose . A list of customers is displayed.

3. Locate the applicable customer and choose . The Customer pop-up window appears.
4. From Customer Classification, select the Buyer's customer classification, if applicable.
5. From Buyer Organization, select the Buyer organization to associate with the customer ID.
6. Choose .

### 10.1.2.3 Deleting a Customer Definition

To delete a customer definition:

1. From the tree in the application rules side panel, choose Shipping > Customer > Customer Definition. The Customer Search window appears in the work area.
2. Enter applicable search criteria and choose . A list of customers is displayed.
3. Locate the applicable customer and choose .

## 10.2 Defining Activities

Activities in the warehouse are grouped into Activity Groups. Yantra 7x WMS provides a pre-defined set of activity groups for a warehouse. Examples of activity groups include Receiving, VAS, Picking, Packing, and Shipping.

Each activity group is associated with activity codes that define each activity that is performed. For example, shipping activity group has Trailer Loading, and Manifesting activities.

The list here is specific to the Shipping process.

**Note:** Activity Codes and Activity Constraints may be defined only when the WMS tree is loaded for Node / Hub combination.


Use Activities for:

- [Creating an Activity Code](#)

- [Modifying an Activity Code](#)
- [Deleting an Activity Code](#)
- [Setting Up Activity Constraints for Container](#)

### 10.2.1 Creating an Activity Code

To create an activity code:

1. From the tree in the application rules side panel, choose Shipping > Activities. The Activity Search window is displayed.
2. Enter information in the applicable fields. Refer [Table 10–2](#) for field value descriptions.
3. Choose .

**Activity Search ( DEFAULT )**

Activity Group

**Activity List**

Activity Code	Description
MANIFEST	Manifest
TRAILER-LOAD	Trailer Loading
*	

Results 2 Of 2

**Activity Search ( DEFAULT )**


**Table 10–2 Activity Search Window**

Field	Description
Activity Group	This is automatically populated by the system as 'SHIP'.
<b>Activity List</b>	
Activity Code	Enter a name for the activity code. Activity code is the unique identity of the activity.
Description	Enter a brief description for the activity code.

### 10.2.2 Modifying an Activity Code

Once an activity code has been created, it can be modified.


To modify an activity code:

1. From the tree in the application rules side panel, choose Shipping > Activities. The Activity Search window is displayed, with the list of activities.
2. Enter information in the applicable fields. Refer [Table 10–2](#) for field value descriptions.
3. Choose .

*It is recommended that the Yantra 7x WMS provided list of activity codes are not modified.*

### 10.2.3 Deleting an Activity Code

To delete an activity code:

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

*It is recommended that the Yantra 7x WMS provided list of activity codes are not deleted.*

## 10.3 Activity Constraints

Activities in the warehouse are performed based on attributes of the inventory being received. The attributes considered for Packing are containers.

Use Activity Constraint set-up for:

- [Setting Up Activity Constraints for Container](#)

### 10.3.1 Setting Up Activity Constraints for Container

The constraints for the activity of a Container are specified here. This also applies to CASE with LPN and PALLET with LPN.




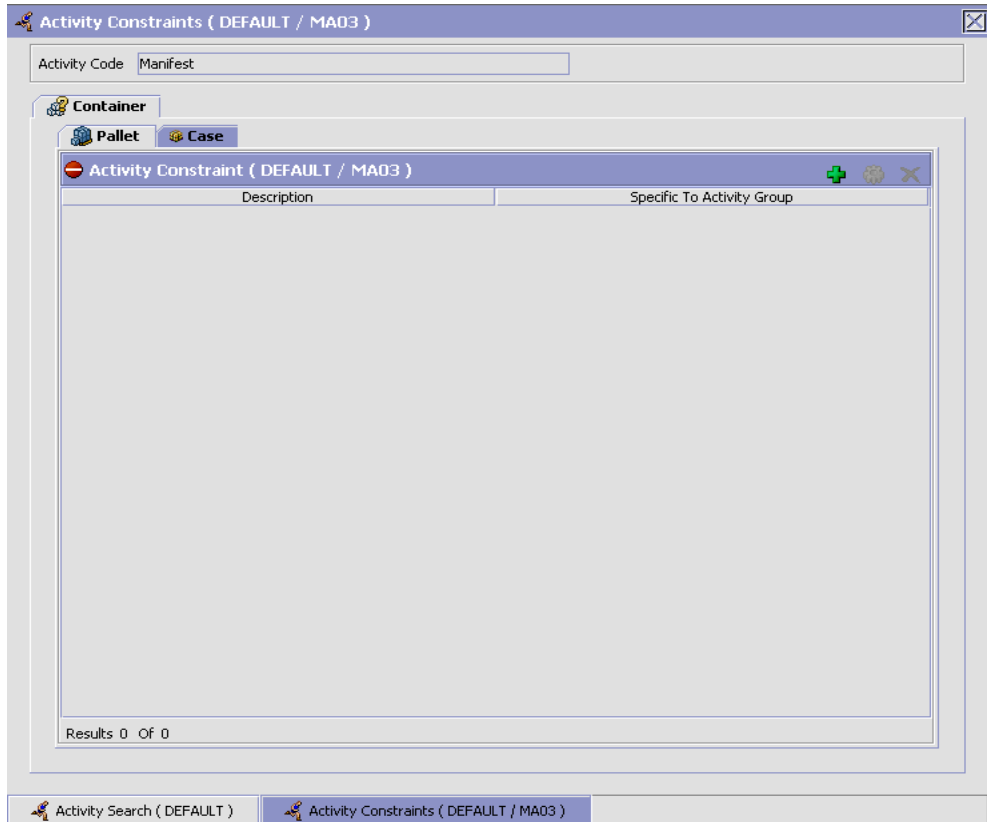
Use the Activity Constraints for Container set-up for:

- [Creating an Activity Constraint for Container](#)
- [Modifying an Activity Constraint for Container](#)
- [Deleting an Activity Constraint for Container](#)

#### **10.3.1.1 Creating an Activity Constraint for Container**

To create an activity constraint for Container:

1. From the tree in the application rules side panel, choose Shipping > Activities. The Activity Search window is displayed, with the list of activities.
2. Choose the Activity List whose Activity Constraint is to be set up.
3. Choose . The Activity Constraints window is displayed.
4. In the Activity Constraints window, choose the Container tab. The Container tab window for Activity Constraints is displayed.





Activity Constraints for Container cases or pallets are specified separately:

- [Setting Up Activity Constraints for Container Pallets](#)
- [Setting Up Activity Constraints for Container Cases](#)


### 10.3.1.1.1 Setting Up Activity Constraints for Container Pallets

To set up activity constraints for container pallets:


1. In the Container tab of Activity Constraints window, choose the Pallet tab. The Pallet tab window is displayed.
2. In the Pallet tab window, choose .

3. The Activity Constraint Details window appears.
4. Enter information in the applicable fields. Refer [Table 10–3](#) for field value descriptions.
5. Choose .

**Activity Constraint Details ( DEFAULT / MA03 ) : Container with unknown contents : Pallet**

Description  To View Strategy Click here 


Activity Code  Requesting Activity Group

Location Priorities	
Priority	Location
2	Bulk Loc
3	Pack_Loc 
*	

Results 2 Of 2

Activity Search ( DEFAULT )    Activity Constraints ( DEFAULT / MA0...    Activity Constraint Details ( DEFAULT...


**Table 10–3 Activity Constraint Details - Containers Pallet Tab**

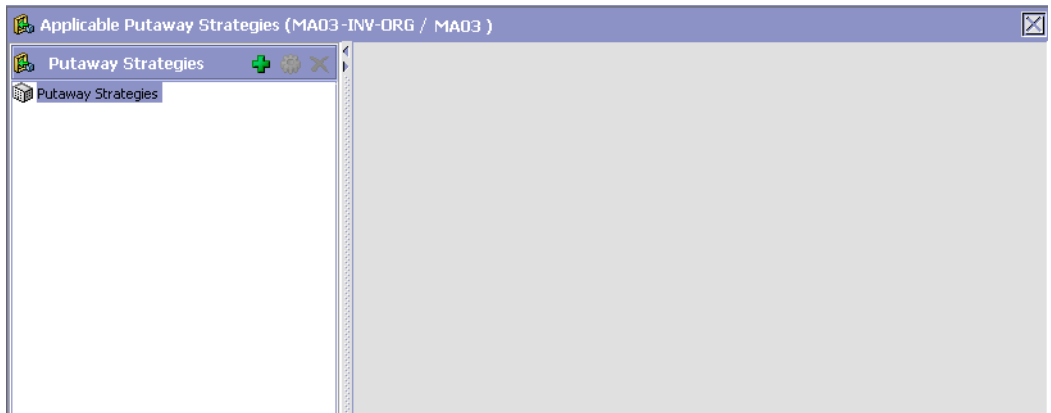
Field	Description
Description	Enter a description for the activity constraint.
To View Strategy Click here	<p>Choose  to view or set up Putaway Strategy. For more details on setting up a putaway strategy see <a href="#">Setting Up Putaway Strategy for Container with Unknown contents - Pallets</a>.</p> <p>Note: Putaway strategy may be specified for the putaway preferences after the preference is saved.</p>
Activity Code	This indicates the activity code for the constraint.
Requesting Activity Group	<p>Choose the requesting activity group.</p> <p>Typical value is Outbound Picking.</p>
<b>Location Priorities</b>	
Priority	<p>Enter a number to represent the priority.</p> <p>The priority is used to sequence the order in which the location priorities are evaluated. For example, all storage code level priorities are to be evaluated first before generic priorities.</p> <p>The priority needs to be a positive integer, greater than zero. This is a mandatory field.</p>
Location	<p>Choose the relevant location for the activity.</p> <p>This is a mandatory field.</p>



### Setting Up Putaway Strategy for Container with Unknown contents - Pallets

You can set up putaway strategies to putaway applicable inventory from a source zone to a target zone, based on the strategy specified.

To set up putaway strategy for container with unknown content pallets:

1. In the Activity Constraint Details : Container with unknown contents : Pallet window, choose .
2. The Applicable Putaway Strategies window is displayed.



3. Choose  in the Putaway Strategies panel. The Putaway Strategy Details window appears in the right panel.
4. Enter information in the applicable fields. See the Putaway Strategy Details Window table for field value descriptions.
5. Choose .

Putaway Strategy Details

DescriptionStrategy for DVD-LockAndKey-EACHUOMCASE

Item Classification

Product LineDVD

StorageTypeLockAndKey

Product Line

System Directed Putaway Task Types

	Source Zone	Target Zone	Container Type	Task Type
*				

Results 0 Of 0

Ad Hoc Task Types




	Source Zone	Target Zone	Container Type	Task Type
*				

Results 0 Of 0

Table 10–4 Putaway Strategy Details Window

Field	Description
Description	Enter a description for the Putaway Strategy.
UOM	Select the UOM for the Putaway Strategy, if applicable. Note: The UOM will be defaulted in instances where it has been specified in the Putaway Preference Details screen.

Table 10–4 Putaway Strategy Details Window

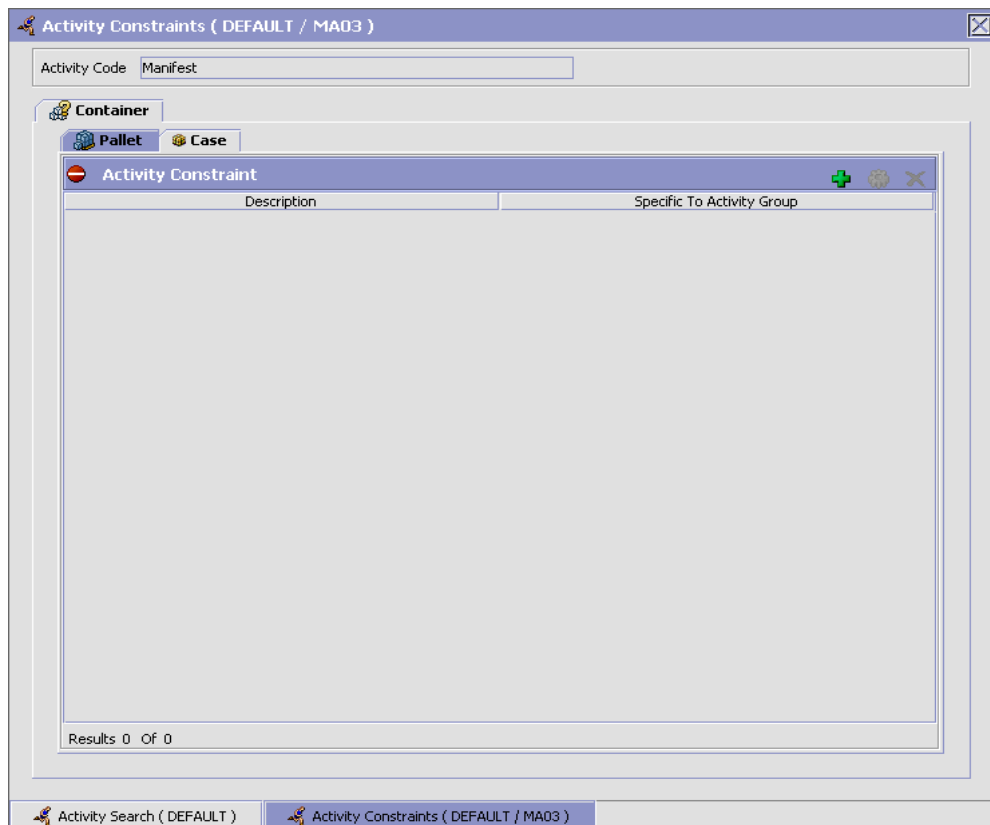
Field	Description
<b>Item Classification</b>	List of putaway item classifications for the Enterprise are displayed. An example, Product Line is shown below.
Product Line	Choose relevant product line item classification for the putaway activity.  Choose  . In the Classification Values window, select the applicable product line classification.
<b>System Directed Putaway Task Types</b>	<b>Displays the list of existing system directed putaway task types.</b>  <b>You may use  to delete an existing system directed putaway task type.</b>
Source Zone	Select the source zone where inventory is available.
Target Zone	Select the target zone where you want to move the inventory.
Container Type	Select the container type to be used to move the inventory from the source zone to the target zone. Typical values are Case and Pallet.
Task Type	Select the Putaway Task Type applicable to this putaway strategy. This field displays the list of existing system directed task types that belong to the 'PUTAWAY' activity group.
<b>Ad hoc Task Types</b>	<b>Displays the list of existing ad hoc task types.</b>  <b>You may use  to delete an existing ad hoc task type.</b>
Source Zone	Select the source zone where inventory is available.
Target Zone	Select the target zone where you want to move the inventory.
Container Type	Select the container type to be used to move the inventory from the source zone to the target zone. Typical values are Case and Pallet.
Task Type	Select the Putaway Task Type applicable to this putaway strategy. This field displays the list of existing ad hoc task types that belong to the 'PUTAWAY' activity group.


6.

### 10.3.1.1.2 Setting Up Activity Constraints for Container Cases


To set up activity constraints for container cases:

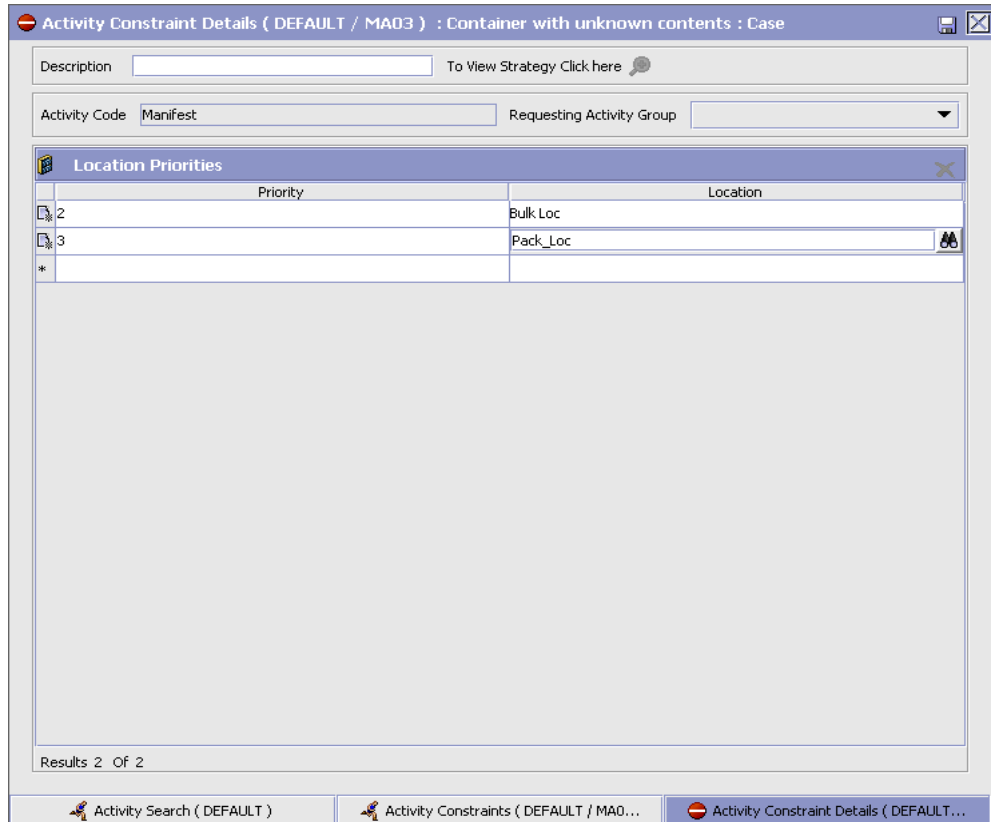
1. In the Container tab of Activity Constraints window, choose the Case tab. The Case tab window is displayed.




2. In the Case tab window, choose .
3. The Activity Constraint Details window appears.
4. Enter information in the applicable fields. Refer [Table 10–5](#) for field value descriptions.




5. Choose .



Activity Constraint Details ( DEFAULT / MA03 ) : Container with unknown contents : Case

Description  To View Strategy Click here 


Activity Code  Requesting Activity Group

Location Priorities	
Priority	Location
2	Bulk Loc
3	Pack_Loc 
*	

Results 2 Of 2

Activity Search ( DEFAULT )   Activity Constraints ( DEFAULT / MA03... )   Activity Constraint Details ( DEFAULT... )

**Table 10–5 Activity Constraint Details - Containers Case Tab**

Field	Description
Description	Enter a description for the activity constraint.
To View Strategy Click here	<p>Choose  to view or set up Putaway Strategy. For more details on setting up a putaway strategy see <a href="#">Setting Up Putaway Strategy for Container with unknown contents - Cases</a>.</p> <p>Note: Putaway strategy may be specified for the putaway preferences after the preference is saved.</p>


**Table 10–5 Activity Constraint Details - Containers Case Tab**

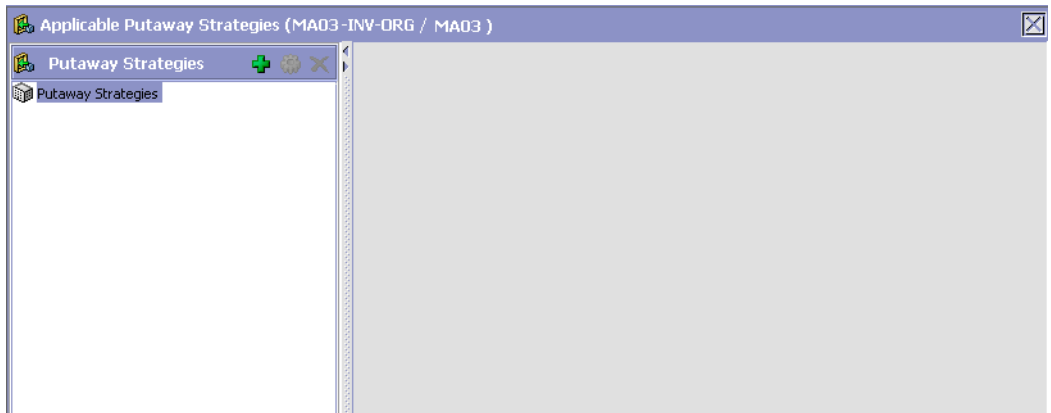
Field	Description
Activity Code	This indicates the activity code for the constraint.
Requesting Activity Group	Choose the requesting activity group. Typical value is Outbound Picking.
<b>Location Priorities</b>	
Priority	Enter a number to represent the priority.  The priority is used to sequence the order in which the location priorities are evaluated. For example, all storage code level priorities are to be evaluated first before generic priorities.  The priority needs to be a positive integer, greater than zero. This is a mandatory field.
Location	Choose the relevant location for the activity.  This is a mandatory field.



### Setting Up Putaway Strategy for Container with unknown contents - Cases

You can set up putaway strategies to putaway applicable inventory from a source zone to a target zone, based on the strategy specified.

To set up putaway strategy for Container with unknown contents cases:

1. In the Activity Constraint Details : Container with unknown content : Case window, choose .
2. The Applicable Putaway Strategies window is displayed.



3. Choose  in the Putaway Strategies panel. The Putaway Strategy Details window appears in the right panel.
4. Enter information in the applicable fields. See the Putaway Strategy Details Window table for field value descriptions.
5. Choose .

Putaway Strategy Details

DescriptionStrategy for DVD-LockAndKey-EACHUOMCASE

Item Classification

Product LineDVD

StorageTypeLockAndKey

Product Line

System Directed Putaway Task Types

	Source Zone	Target Zone	Container Type	Task Type
*				

Results 0 Of 0

Ad Hoc Task Types




	Source Zone	Target Zone	Container Type	Task Type
*				

Results 0 Of 0

Table 10–6 Putaway Strategy Details Window

Field	Description
Description	Enter a description for the Putaway Strategy.
UOM	Select the UOM for the Putaway Strategy, if applicable. Note: The UOM will be defaulted in instances where it has been specified in the Putaway Preference Details screen.




**Table 10–6 Putaway Strategy Details Window**

Field	Description
<b>Item Classification</b>	List of putaway item classifications for the Enterprise are displayed. An example, Product Line is shown below.
Product Line	Choose relevant product line item classification for the putaway activity.  Choose  . In the Classification Values window, select the applicable product line classification.
<b>System Directed Putaway Task Types</b>	<b>Displays the list of existing system directed putaway task types.</b>  <b>You may use  to delete an existing system directed putaway task type.</b>
Source Zone	Select the source zone where inventory is available.
Target Zone	Select the target zone where you want to move the inventory.
Container Type	Select the container type to be used to move the inventory from the source zone to the target zone. Typical values are Case and Pallet.
Task Type	Select the Putaway Task Type applicable to this putaway strategy. This field displays the list of existing system directed task types that belong to the 'PUTAWAY' activity group.
<b>Ad hoc Task Types</b>	<b>Displays the list of existing ad hoc task types.</b>  <b>You may use  to delete an existing ad hoc task type.</b>
Source Zone	Select the source zone where inventory is available.
Target Zone	Select the target zone where you want to move the inventory.
Container Type	Select the container type to be used to move the inventory from the source zone to the target zone. Typical values are Case and Pallet.
Task Type	Select the Putaway Task Type applicable to this putaway strategy. This field displays the list of existing ad hoc task types that belong to the 'PUTAWAY' activity group.

6.



### 10.3.1.2 Modifying an Activity Constraint for Container

To modify an activity constraint for container:

1. From the tree in the application rules side panel, choose Shipping > Activities. The Activity Search window is displayed, with the list of activities.
2. Choose the Activity List whose Activity Constraint is to be set up.
3. Choose . The Activity Constraints window is displayed.
4. In the Activity Constraints window, choose the Container tab. The Container tab window for Activity Constraints is displayed.
5. In the Container tab window, choose the activity constraint to be modified.
6. Choose . The Activity Constraint Details window is displayed.
7. Enter information in the applicable fields. For more information about modifying the fields, see [Section 10.3.1.1.1, "Setting Up Activity Constraints for Container Pallets"](#) on page 846 and [Section 10.3.1.1.2, "Setting Up Activity Constraints for Container Cases"](#) on page 852.
8. Choose .

### 10.3.1.3 Deleting an Activity Constraint for Container

To delete an activity constraint for container:

1. From the tree in the application rules side panel, choose Shipping > Activities. The Activity Search window is displayed, with the list of activities.
2. Choose the Activity List whose Activity Constraint is to be set up.
3. Choose . The Activity Constraints window is displayed.
4. In the Activity Constraints window, choose the Container tab. The Container tab window for Activity Constraints is displayed.
5. In the Container tab window, choose the activity constraint to be deleted.
6. Choose .

## 10.4 Defining Parcel Carrier Preferences

Parcel Carrier Preferences are used to set up carrier specific preferences that is used in the shipping process. Parcel Carrier Preferences define the carrier name, organization code, and shipper account information, along with third party billing information.

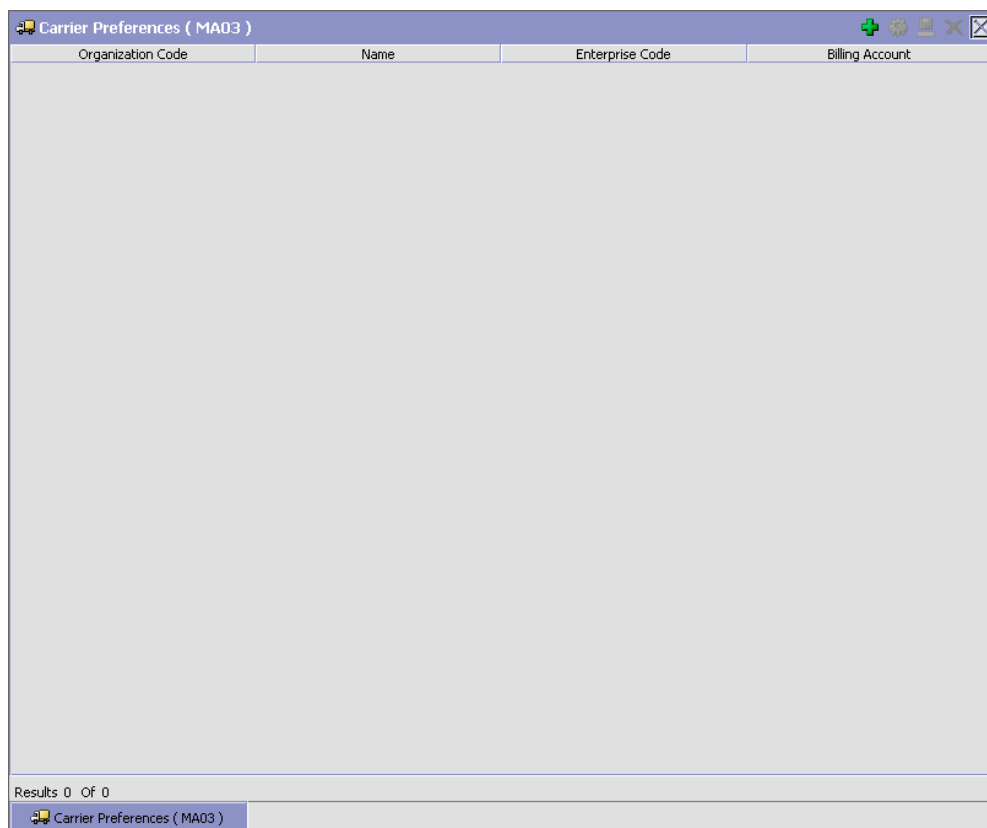
Use Parcel Carrier Preferences for:



- [Creating a Parcel Carrier Preference](#)
- [Creating a New Parcel Carrier Preference from an Existing Parcel Carrier Preference](#)
- [Modifying a Parcel Carrier Preference](#)
- [Deleting a Parcel Carrier Preference](#)

### 10.4.1 Creating a Parcel Carrier Preference

To create a parcel carrier preference:

1. From the tree in the application rules side panel, choose Shipping > Parcel Carrier Preferences. The Parcel Carrier Preferences window is displayed.



2. In the Parcel Carrier Preferences window, choose . The Parcel Carrier Preferences Detail pop-up window appears.
3. Enter information in the applicable fields. Refer to [Table 10–7](#) for field value descriptions.
4. Choose .



**Parcel Carrier Preferences Detail**

Carrier

Enterprise Code

Shipping Account

☐ Should shipping charges be billed to third party Organization?

Third Party Organization Details

Organization Code

Billing Account

Online Control #

☐ International Shipping Integration Required

☐ Domestic Shipping Integration Required

☐ Allow system to automatically open a manifest



**Table 10–7 Parcel Carrier Preferences Detail Pop-up Window**

Field	Description
Carrier	Choose the carrier to set up the preferences. This is a mandatory field.
Enterprise Code	Choose the enterprise code.
Shipping Account	Enter the shipping account information.
Should shipping charges be billed to third party organization?	Check this box if shipping charges are to be billed to a third party organization.
<b>Third Party Organization Details</b>	
Organization Code	Choose the organization code of the third party organization.
Billing Account	Choose the billing account information of the third party organization.

Field	Description
Online Control #	Enter the online control number for the carrier preference.
International Shipping Integration Required	Check this box if international shipping integration is required.
Domestic Shipping Integration Required	Check this box if domestic shipping integration is required.
Allow system to automatically open a manifest	Check this box if the system should be allowed to automatically open a manifest.

### 10.4.2 Creating a New Parcel Carrier Preference from an Existing Parcel Carrier Preference

To create a new parcel carrier preference from an existing parcel carrier preference:



1. From the tree in the application rules side panel, choose Shipping > Parcel Carrier Preferences. The Parcel Carrier Preferences window is displayed, with the list of Parcel Carrier Preferences.
2. In the Parcel Carrier Preferences window, choose the Parcel Carrier Preference to be copied from.
3. Choose . The Parcel Carrier Preferences Detail pop-up window appears.
4. Enter information in the applicable fields. Refer [Table 10–7](#) for field value descriptions.
5. Choose .

### 10.4.3 Modifying a Parcel Carrier Preference

Once a parcel carrier preference has been created, it can be modified.


To modify a parcel carrier preference:

1. From the tree in the application rules side panel, choose Shipping > Parcel Carrier Preferences. The Parcel Carrier Preferences window is displayed, with the list of Parcel Carrier Preferences.

2. In the Parcel Carrier Preferences window, choose the Parcel Carrier Preference to be modified.
3. Choose . The Parcel Carrier Preference Details pop-up window appears.
4. Enter information in the applicable fields. Refer [Table 10–7](#) for field value descriptions.
5. Choose .

### 10.4.4 Deleting a Parcel Carrier Preference

To delete a parcel carrier preference:

1. From the tree in the application rules side panel, choose Shipping > Parcel Carrier Preferences. The Parcel Carrier Preferences window is displayed, with the list of Parcel Carrier Preferences.
2. Choose the Parcel Carrier Preference to be deleted.
3. Choose .

## 10.5 Defining LTL Carrier Preferences

The LTL Carrier Preferences set up is used to configure the PRO Number generation in Yantra 7x WMS.

PRO Number refers to the unique progressive or serial number assigned by the carrier to identify and track a specific shipment. This is used on freight bills, bills of lading, and waybills for invoicing and tracking purposes.

A warehouse may define the range of PRO Numbers assigned by a carrier. The PRO Number has a fixed length defined for each carrier, and may contain a prefix.

PRO Number is typically generated during routing for a load with carrier type 'LTL'. The PRO number is regenerated automatically when the carrier/service on the load is changed.

Use LTL Carrier Preferences for:

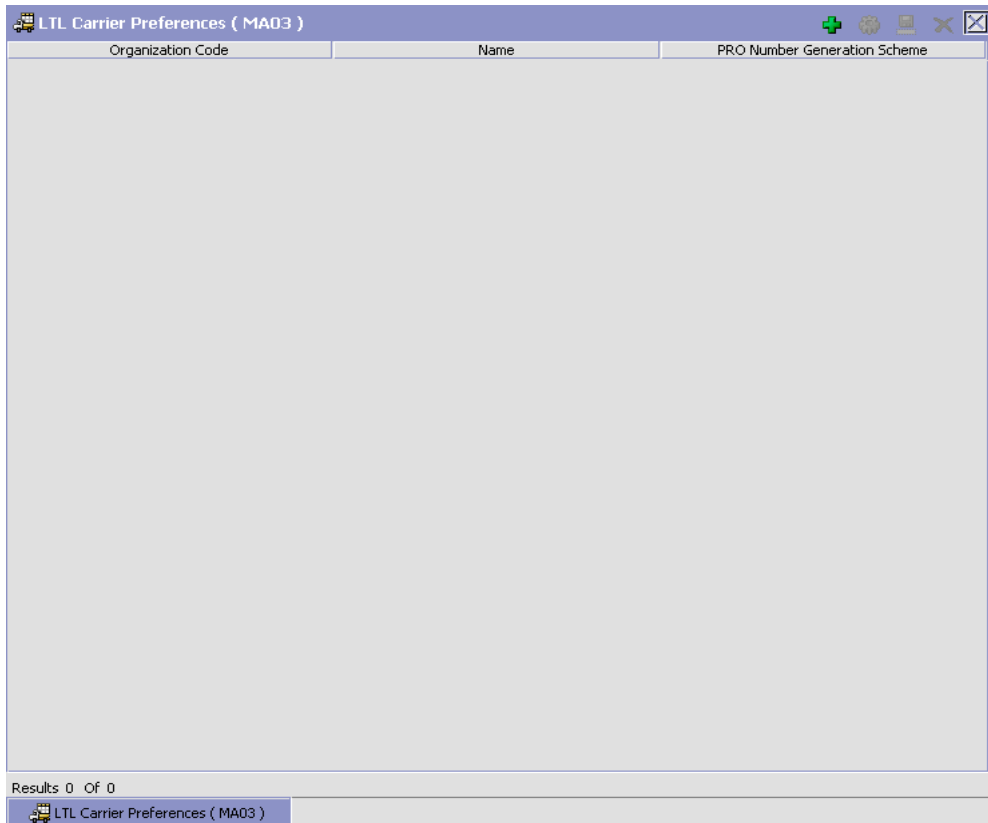
- [Creating an LTL Carrier Preference](#)
- [Creating a New LTL Carrier Preference from an Existing LTL Carrier Preference](#)


- [Modifying an LTL Carrier Preference](#)
- [Deleting an LTL Carrier Preference](#)


### 10.5.1 Creating an LTL Carrier Preference

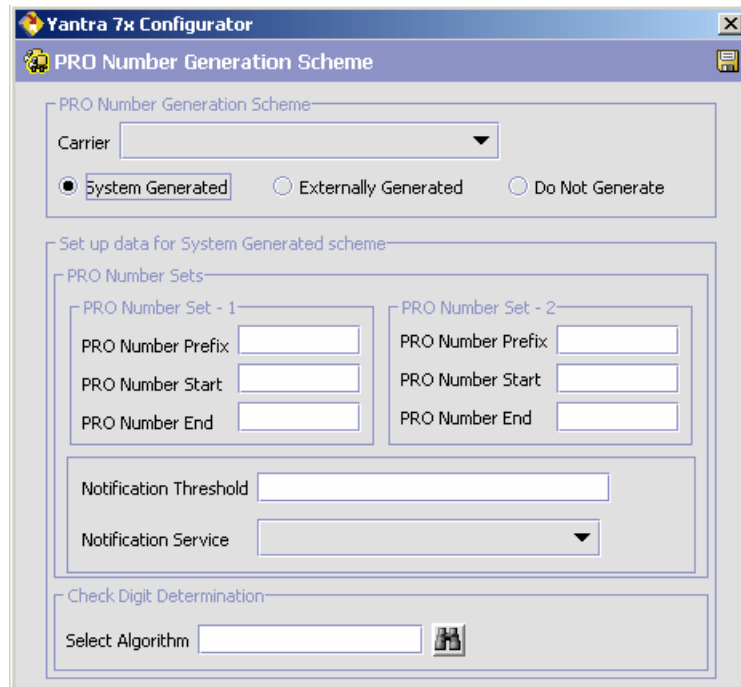
To create an LTL carrier preference:

1. From the tree in the application rules side panel, choose Shipping > LTL Carrier Preferences. The LTL Carrier Preferences window is displayed.



2. In the LTL Carrier Preferences window, choose . The PRO Number Generation Scheme pop-up window appears.

3. Enter information in the applicable fields. Refer [Table 10–8](#) for field value descriptions.
4. Choose .



**Table 10–8** *PRO Number Generation Scheme Popup Window*

Field	Description
<b>PRO Number Generation Scheme</b>	<p>One of the following actions is initiated based on the Generation Scheme selected:</p> <ul style="list-style-type: none"> <li>Yantra 7x WMS generates the PRO Numbers</li> <li>Yantra 7x WMS uses the PRO Numbers generated by an external system, or</li> <li>Yantra 7x WMS does not generate PRO Numbers.</li> </ul>
Carrier	Choose the carrier whose PRO Number Generation Scheme is being defined.

**Table 10–8 PRO Number Generation Scheme Popup Window**

Field	Description
System Generated	Select 'System Generated' if Yantra 7x WMS should generate PRO Numbers.
Externally Generated	Select 'Externally Generated' if Yantra 7x WMS should use PRO Numbers generated by an external system.
Do Not Generate	Select 'Do Not Generate' if PRO Numbers should not be generated.
<b>Set up data for System Generated scheme</b>	<b>This is applicable only when Yantra 7x WMS generates the PRO Numbers.</b>
<b>PRO Number Sets</b>	<b>When the first range of PRO Numbers is used up, Yantra 7x WMS utilizes the second range of PRO Numbers, and vice versa.</b>
<b>PRO Number Set - 1</b>	<b>Defines the first range of PRO Numbers to be used by Yantra 7x WMS.</b>
PRO Number Prefix	Enter the PRO Number Prefix to be used in generating the first range of PRO Numbers.  PRO Number Prefix can be alpha numeric, and is not included for computing the check digit.
PRO Number Start	Enter the PRO Number Start to be used in generating the first range of PRO Numbers.  PRO Number Start is the starting number for the first set of PRO Numbers.
PRO Number End	Enter the PRO Number End to be used in generating the first range of PRO number.  PRO Number End is the ending number for the first set of PRO Numbers.
<b>PRO Number Set - 2</b>	<b>Defines the second range of PRO Numbers to be used by Yantra 7x WMS.</b>
PRO Number Prefix	Enter the PRO Number Prefix to be used in generating the second range of PRO Numbers.  PRO Number Prefix can be alpha numeric, and is not included for computing the check digit.


**Table 10–8 PRO Number Generation Scheme Popup Window**

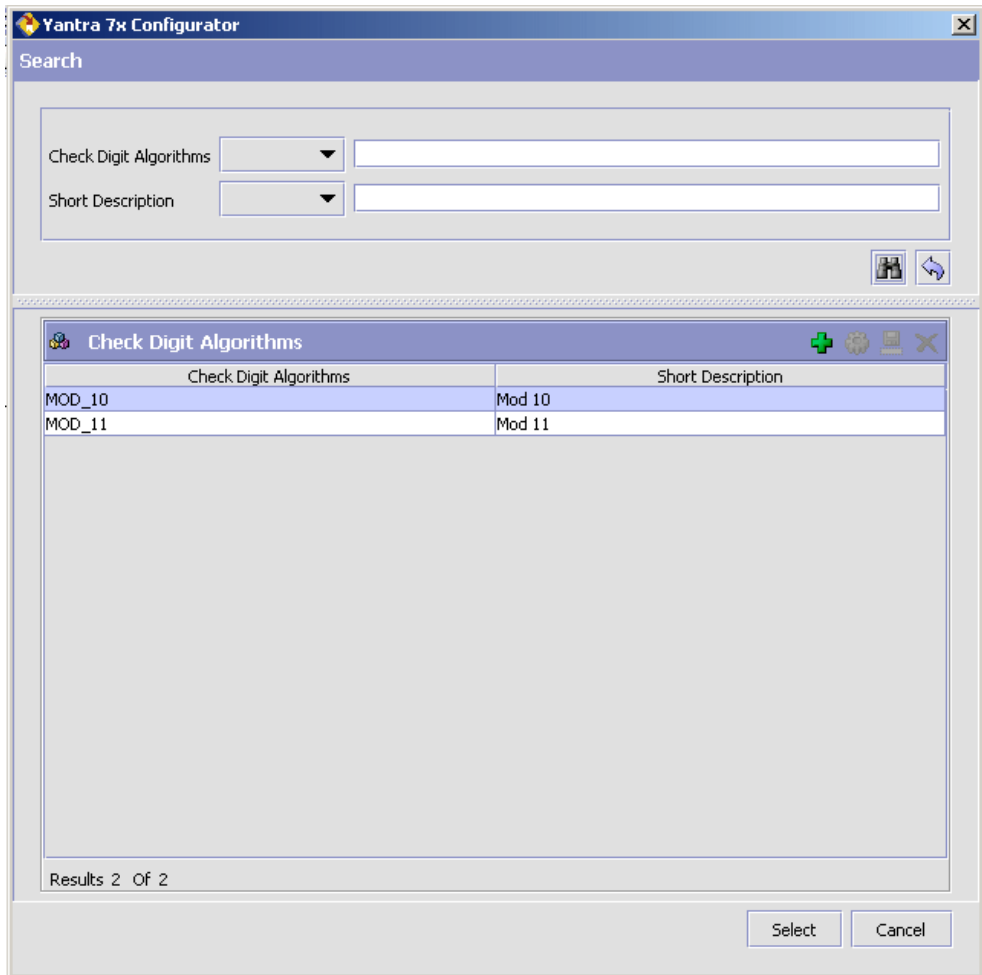
Field	Description
PRO Number Start	Enter the PRO Number Start to be used in generating the second range of PRO Numbers.  PRO Number Start is the starting number for the second set of PRO Numbers.
PRO Number End	Enter the PRO Number End to be used in generating the second range of PRO Numbers.  PRO Number End is the ending number for the second set of PRO Numbers.
Notification Threshold	Enter the notification threshold at which an alert is raised to the user. This gains importance in instances where the second set of PRO Numbers is not defined.  The notification threshold defines the number of unassigned PRO Numbers available till the PRO Number End. This enables the warehouse to talk to the carrier and get a new range of PRO Numbers.  <b>Note:</b> If the PRO Number End is X, and the notification threshold is set to 50, Yantra 7x WMS raises an alert to the user, when the current PRO Number (unassigned) reaches X-50.
Notification Service	Choose Notification Service to be used.  Notification Service is the service that will be invoked when Notification Threshold is reached.
<b>Check Digit Determination</b>	<b>Defines the check digit determination algorithm to be used for PRO Number Generation.</b>
Select Algorithm	Choose the relevant algorithm for check digit determination.  Typical values are mod-11 and mod-10.  <b>Note:</b> When 'mod-11' or 'mod-10' schema of check digit determination is chosen, the check digit is generated out-of-the-box by Yantra 7x WMS.  For more details about Check Digit Determination Algorithm, see <a href="#">Section 10.5.1.1, "Setting Up a Check Digit Determination Algorithm"</a> on page 867.


### 10.5.1.1 Setting Up a Check Digit Determination Algorithm

#### 10.5.1.1.1 Creating a Check Digit Determination Algorithm


To set up a check digit determination algorithm:

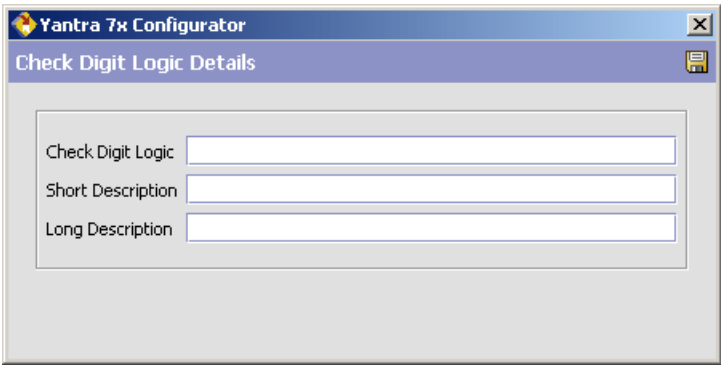
1. In the PRO Number Generation Scheme pop-up window, choose .
2. The Check Digit Algorithms Search window appears.



3. In the Check Digit Algorithms panel, choose . The Check Digit Logic Details pop-up window appears.



- 4. Enter information in the applicable fields. Refer [Table 10–9](#) for field value descriptions.
- 5. Choose .







**Table 10–9** *Check Digit Logic Details Popup Window*

Field	Description
Check Digit Logic	Enter the check digit logic for the algorithm being created.
Short Description	Enter a short description for the algorithm being created.
Long Description	Enter a long description for the algorithm being created.

**10.5.1.1.2 Creating a New Check Digit Determination Algorithm from an Existing Check Digit Determination Algorithm**

To create a new check digit determination algorithm from an existing check digit determination algorithm:





- 1. In the PRO Number Generation Scheme pop-up window, choose .
- 2. The Check Digit Algorithms Search window appears.
- 3. In the Search panel, enter applicable search criteria, and choose .
- 4. The relevant search results are displayed in the Check Digit Algorithms panel.

5. From the Check Digit Algorithms list, choose the Check Digit Algorithm to be copied from.
6. Choose . The Check Digit Logic Details pop-up window appears.
7. Enter information in the applicable fields. Refer [Table 10–9](#) for field value descriptions.
8. Choose .

### 10.5.1.1.3 Modifying a Check Digit Determination Algorithm



Once a check digit determination algorithm has been created, it can be modified.


To modify a check digit determination algorithm:

1. In the PRO Number Generation Scheme pop-up window, choose .
2. The Check Digit Algorithms Search window appears.
3. In the Search panel, enter applicable search criteria, and choose .
4. The relevant search results are displayed in the Check Digit Algorithms panel.
5. From the Check Digit Algorithms list, choose the Check Digit Algorithm to be modified.
6. Choose . The Check Digit Logic Details pop-up window appears.
7. Enter information in the applicable fields. Refer [Table 10–9](#) for field value descriptions.
8. Choose .

### 10.5.1.1.4 Deleting a Check Digit Determination Algorithm



To delete a check digit determination algorithm:

1. In the PRO Number Generation Scheme pop-up window, choose .
2. The Check Digit Algorithms Search window appears.
3. In the Search panel, enter applicable search criteria, and choose .
4. The relevant search results are displayed in the Check Digit Algorithms panel.

5. From the Check Digit Algorithms list, choose the Check Digit Algorithm to be deleted.
6. Choose .

## 10.5.2 Creating a New LTL Carrier Preference from an Existing LTL Carrier Preference



To create a new LTL carrier preference from an existing LTL carrier preference:

1. From the tree in the application rules side panel, choose Shipping > LTL Carrier Preferences. The LTL Carrier Preferences window is displayed, with the list of LTL Carrier Preferences.
2. In the LTL Carrier Preferences window, choose the LTL Carrier Preference to be copied from.
3. Choose . The PRO Number Generation Scheme pop-up window appears.
4. Enter information in the applicable fields. Refer [Table 10–8](#) for field value descriptions.
5. Choose .

## 10.5.3 Modifying an LTL Carrier Preference


Once an LTL carrier preference has been created, it can be modified.

To modify an LTL carrier preference:

1. From the tree in the application rules side panel, choose Shipping > LTL Carrier Preferences. The LTL Carrier Preferences window is displayed, with the list of LTL Carrier Preferences.
2. In the LTL Carrier Preferences window, choose the LTL Carrier Preference to be modified.
3. Choose . The PRO Number Generation Scheme pop-up window appears.
4. Enter information in the applicable fields. Refer [Table 10–8](#) for field value descriptions.
5. Choose .

### 10.5.4 Deleting an LTL Carrier Preference

To delete an LTL carrier preference:

1. From the tree in the application rules side panel, choose Shipping > LTL Carrier Preferences. The LTL Carrier Preferences window is displayed, with the list of LTL Carrier Preferences.
2. Choose the LTL Carrier Preference to be deleted.
3. Choose .

## 10.6 Defining Shipping Modification Rules

Shipping Modification Rules apply to the following document types:

- Sales Order
- Transfer Order

For more information about Shipping Modification Rules, see *Yantra 7x Distributed Order Management Configuration Guide*.

For more information about defining and changing modification rules, see *Yantra 7x Distributed Order Management Configuration Guide*.

## 10.7 Defining Shipping Process Type Details

Shipping Process Type Details apply to the following document types:

- Sales Order
- Transfer Order

For more information about Shipping Process Type Details, see *Yantra 7x Distributed Order Management Configuration Guide*.

For more information about defining and modifying process type details, *Yantra 7x Platform Configuration Guide*.

## 10.8 Defining Shipping Process Model

Shipping Process Models apply to the following document types:

- Sales Order
- Transfer Order

For more information about Shipping Process Models, see *Yantra 7x Distributed Order Management Configuration Guide*.

For more information about Pipeline Determination, see *Yantra 7x Platform Configuration Guide*.

## 10.9 Defining Load Modification Rules

Load Modification Rules apply to the following document types:

- Load

For more information about Load Modification Rules, see *Yantra 7x Logistics Management Configuration Guide*.

For more information about defining and changing modification rules, see *Yantra 7x Platform Configuration Guide*.

## 10.10 Defining Load Process Type Details

Load Process Type Details apply to the following document types:

- Load

For more information about Load Process Type Details, see *Yantra 7x Logistics Management Configuration Guide*.

For more information about defining and modifying process type details, see *Yantra 7x Platform Configuration Guide*.

## 10.11 Defining Load Process Model

Load Process Models apply to the following document types:

- Load

For more information about Load Process Models, see *Yantra 7x Logistics Management Configuration Guide*.

For more information about Pipeline Determination, see *Yantra 7x Platform Configuration Guide*.




## Configuring Transportation

---

You can record transportation or in-transit updates for a container. These updates are recorded against activities defined in Yantra 7x as transportation activities.

### 11.1 Creating an Activity Code

To create an activity code:

1. From the tree in the application rules side panel, choose Transportation > Activities. The Activity Search window displays.
2. Enter information in the applicable fields. Refer to [Table 11–1](#) for field value descriptions.
3. Choose .

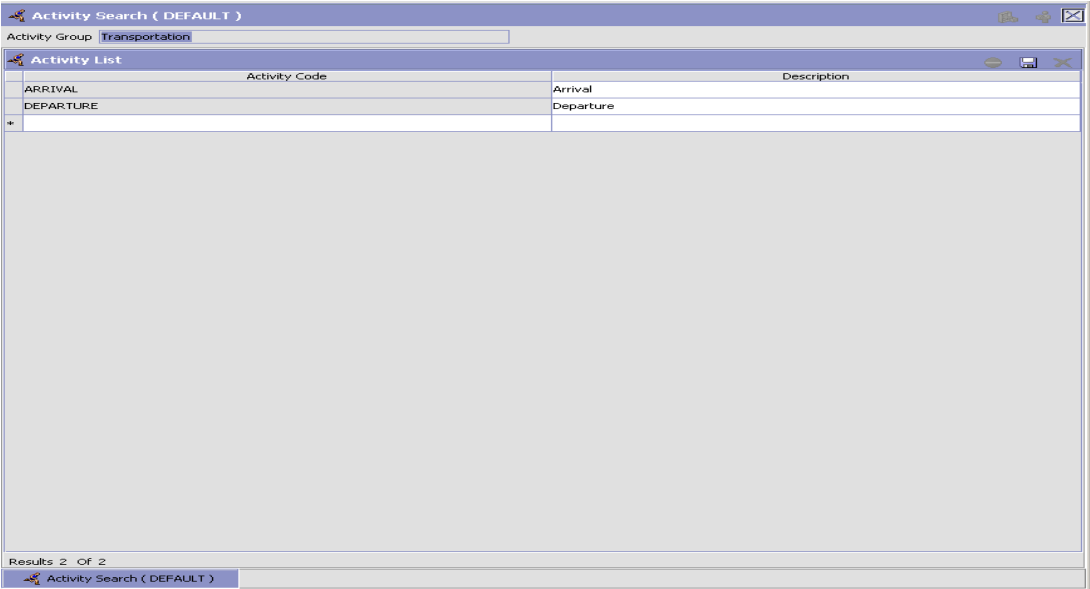


Table 11–1 Activity Search Window

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

## 11.2 Modifying an Activity Code

To modify an activity code:

1. From the tree in the application rules side panel, choose Transportation > Activities. The Activity Search window displays, with the list of activities.
2. Enter information in the applicable fields. Refer to [Table 11–1](#) for field value descriptions.



3. Choose .

---

---


**Note:** It is recommended that you do not modify the list of activity codes provided by Yantra 7x WMS.

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## 11.3 Deleting an Activity Code

To delete an activity code:

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

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---

**Note:** It is recommended that you do not modify the list of activity codes provided by Yantra 7x WMS.

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# Configuring Task Management

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Task Management configuration enables you to set up your warehouse to optimize node throughput and maximize worker efficiency. Task management configuration consists of the following procedures:

- [Defining Installation Rules](#)
- [Defining Reason Codes](#)
- [Defining Task Types](#)
- [Defining User Skills](#)
- [Defining Productivity Types](#)
- [Defining Execution Exceptions](#)
- [Defining Transaction Repository](#)
- [Defining Purge Criteria](#)

## 12.1 Defining Installation Rules



Installation rules are the set of rules that apply to task management for the following features:

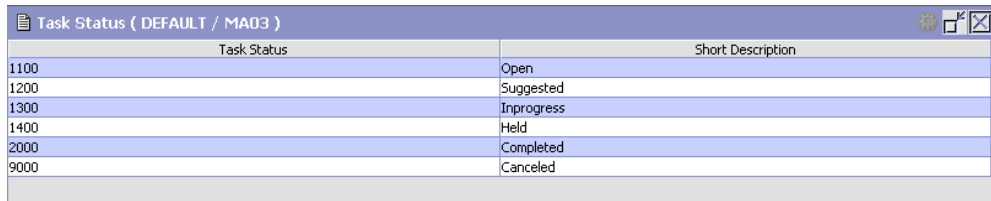
- Task Statuses
- Batch Statuses
- Task References

### 12.1.1 Defining Task Statuses

Task statuses are the milestones within a pipeline through which a task travel. Batch status values are predefined and require common code set up. Extended statuses cannot be created.

To modify task status descriptions:

1. From the tree in the application rules side panel, choose Task Management > Installation Rules > Task Status. The Task Status window is displayed.
2. In the Task Status window, choose the task to be modified.
3. Choose . The Task Status Details popup window appears.
4. Edit information as applicable in the Long Description and Short Description fields.
5. Choose .



Task Status	Short Description
1100	Open
1200	Suggested
1300	Inprogress
1400	Held
2000	Completed
9000	Canceled



**Yantra 7x Configurator**  
Task Status Details

Task Status:

Short Description:



Long Description:

## 12.1.2 Modifying Batch Status Descriptions

Batch statuses are the milestones within a pipeline that a batch of tasks travel through. Batch status values are pre-defined and require common code set up. Extended statuses cannot be created.

You can modify the description associated with each batch status.

To modify batch status descriptions:

1. From the tree in the application rules side panel, choose Task Management > Installation Rules > Batch Status. The Batch Status window is displayed.
2. In the Batch Status window, choose the batch to be modified.
3. Choose . The Batch Status Details popup window appears.
4. Edit information as applicable in the Long Description and Short Description fields.
5. Choose .

Batch Status ( DEFAULT / MA03 )

Batch Status	Short Description
1100	Open
2000	Completed
9000	Canceled

Results 3 Of 3

Batch Status ( DEFAULT / MA03 )

Yantra 7x Configurator



Batch Status Details

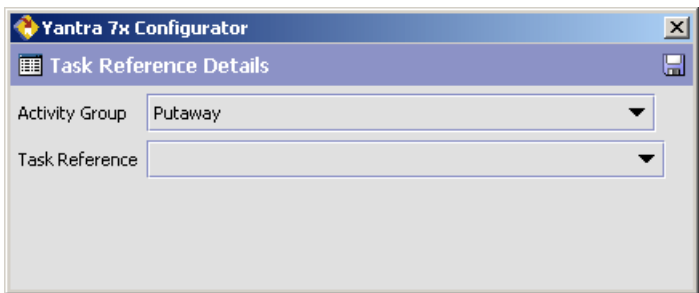
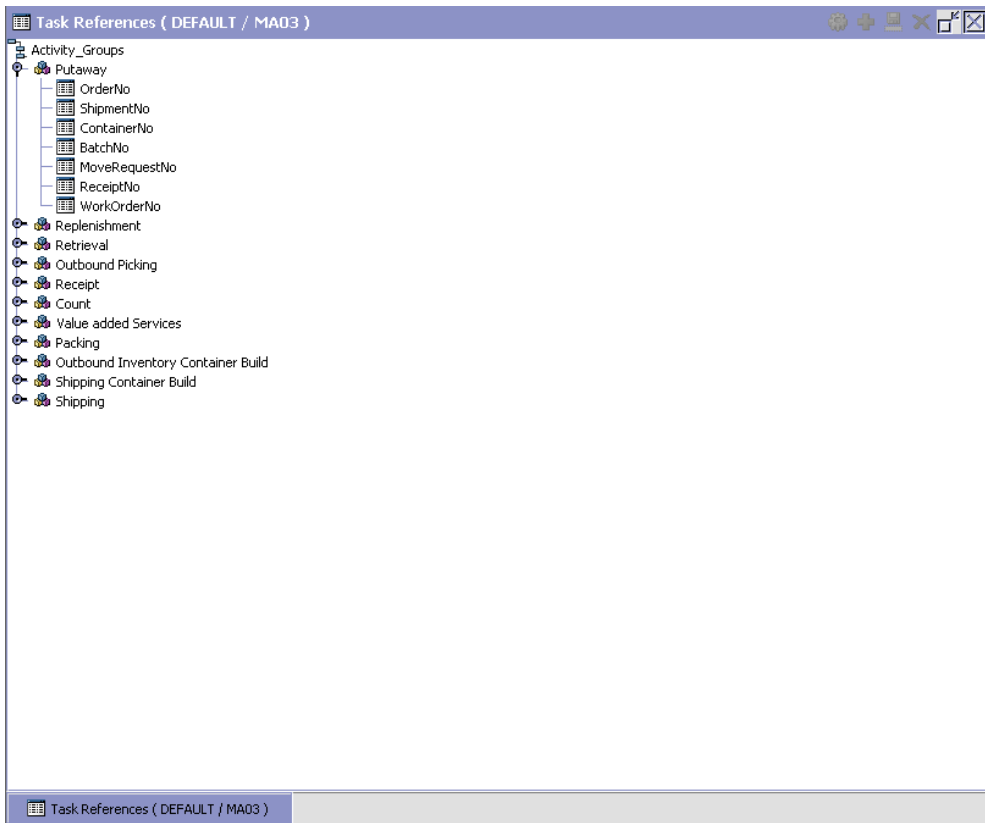
Batch Status	1100
Short Description	Open
Long Description	Open

### 12.1.3 Viewing Task References

Task references are literals displayed on the task summary. Each task can have multiple transaction reference. Task References are shipped as a set of Activity Groups.

To add task references:

1. From the tree in the application rules side panel, choose Task Management > Installation Rules > Task References. The Task References window is displayed.
2. In the Task references window, choose the Activity Group for which you want to view the task reference details.
3. Choose . The Task Reference Details popup window appears.
4. Choose a relevant Activity Group and Task Reference.
5. Choose .





## 12.2 Defining Reason Codes



Reason codes are literals that enable the run-time users to add explanations for carrying out certain procedures, such as putting a task on hold for inventory replenishment.

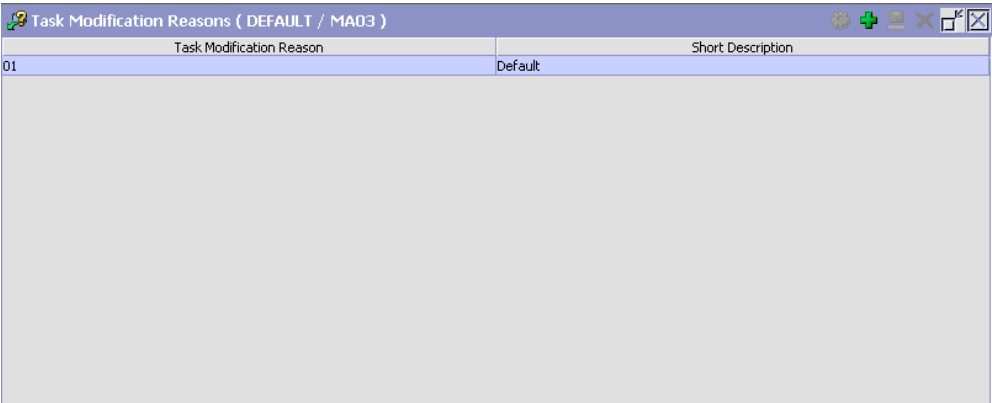
Use Reason Codes for:

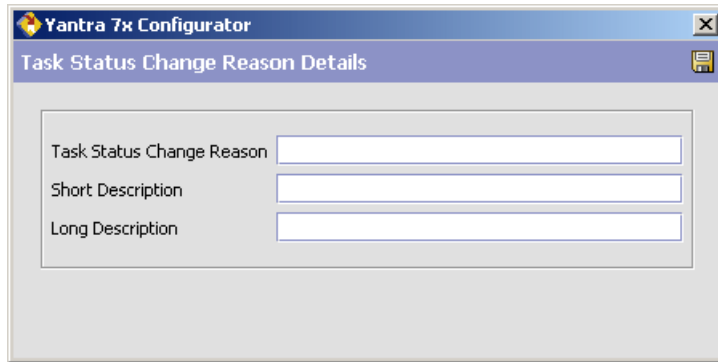
- [Setting Up Task Modification Reasons](#)

### 12.2.1 Setting Up Task Modification Reasons

To set up task modification reasons:



1. From the tree in the application rules side panel, choose Task Management > Reason Codes > Task Modification Reasons. The Task Modification Reasons window is displayed.
2. Choose . The Task Status Change Reason Details popup window appears.
3. Enter information in the applicable fields.
4. Choose .







### 12.2.2 Modifying Reason Codes

To modify task modification reasons:

1. From the tree in the application rules side panel, choose Task Management > Reason Codes > Task Modification Reasons. The Task Modification Reasons window is displayed.
2. Select the Task Modification Reason to be modified.
3. Choose . The Task Status Change Reason Details popup window appears.
4. Enter information in the applicable fields.
5. Choose .

### 12.2.3 Deleting Reason Codes

To delete task modification reasons:

1. From the tree in the application rules side panel, choose Task Management > Reason Codes > Task Modification Reasons. The Task Modification Reasons window is displayed.
2. Select the Modification Reason Code to be deleted.
3. Choose .
4. Choose .

## 12.3 Defining Task Types

Task types provide a way to define exactly how common tasks are to be performed. For example, an everyday task may involve picking cases from shelves and bringing them to a packing station.

When you create a task type, you can define very specifically the way in which a task should be performed. Then, by assigning individual tasks a task type, it will be obvious to the task executor exactly how the task should be performed. For example, a user group called "Pickers" would have an associated task type called "Picking Batches," which specifies that their set of tasks are to pick sets of items from Zone A and deposit them in Zone B.

Task types are grouped within Activity Groups. Yantra 7x has predefined Activity Groups that enable you to easily define a set of task types that share some common characteristics with other tasks that belong to the same Activity Group.

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**Note:** You cannot add, delete, or modify Activity Groups. However, you can add, delete, and modify Task Types within these Activity Groups.

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Each Activity Group has an associated group of activities. For example, the Outbound Picking activity group consists of tasks pertaining to picking, such as the following activities:

- Picking batches
- Picking items
- Picking orders

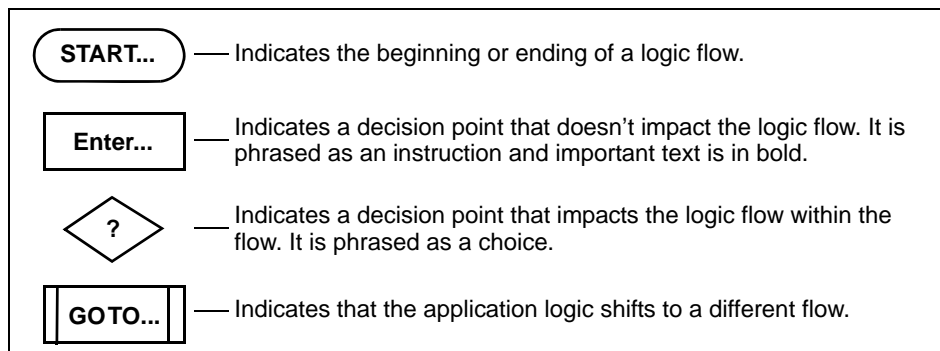
### 12.3.1 Understanding Task Type Logic Flows

Each task type may require a specialized flow of logic, depending on the activities performed within the task type. For example, one task type for outbound products may involve counting, picking, and packing a product; and another task type for replenishment may involve unpacking, counting, and shelving a product. These task types may contain subflows of logic as follows:

- Count - This flow may involve a batching subflow and a mobile device subflow. See [Figure 12–3, "Count Flow Task Type Logic"](#).
- Outbound Picking - This flow may involve a batching subflow. See [Figure 12–4, "Outbound Picking Task Type Logic"](#).
- Mobile Device - This flow captures activities that involve a mobile device and may involve a batching subflow. See [Figure 12–6, "Mobile Device Task Type Logic"](#).

These flows of logic depict the decision tree presented to you by the Task Type Wizard. This section describes the Task Type wizard flow of logic from start to finish. For a description of the graphical elements used to depict the logic see [Figure 12–1, "Task Type Wizard Logic Flow"](#).

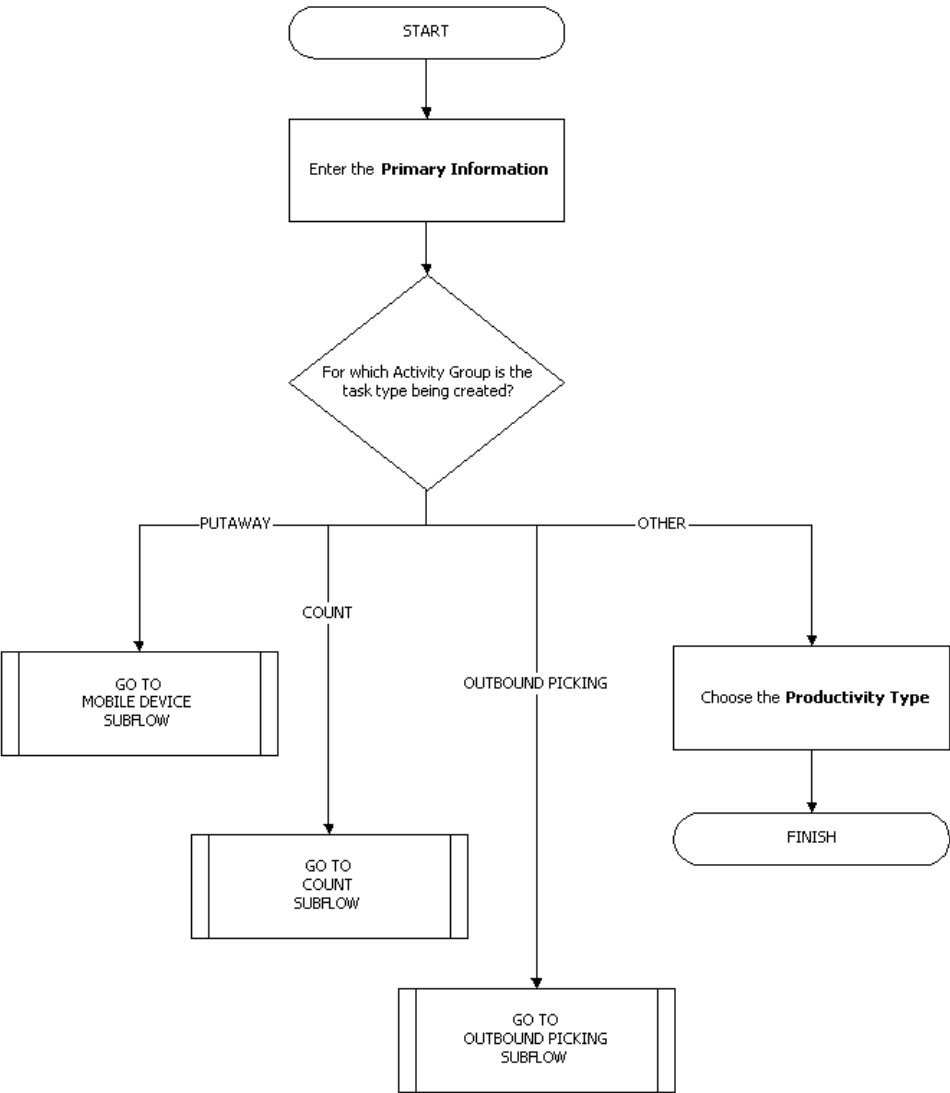
**Figure 12–1 Task Type Wizard Logic Flow**



### Start Flow

For each task type, the Task Type Wizard begins with logic flow shown in [Figure 12–2, "Start Task Type Logic"](#).

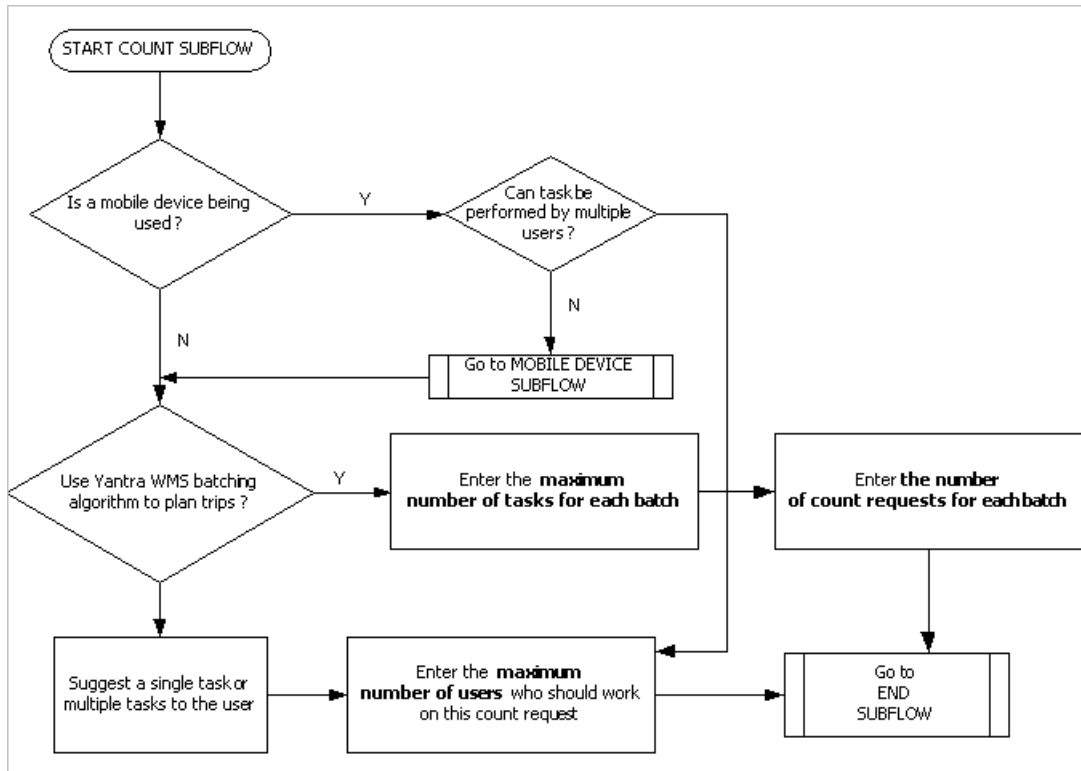
Figure 12–2 Start Task Type Logic



**Count Flow**

For Count task types, the Task Type Wizard uses the logic flow shown in [Figure 12–3, "Count Flow Task Type Logic"](#).

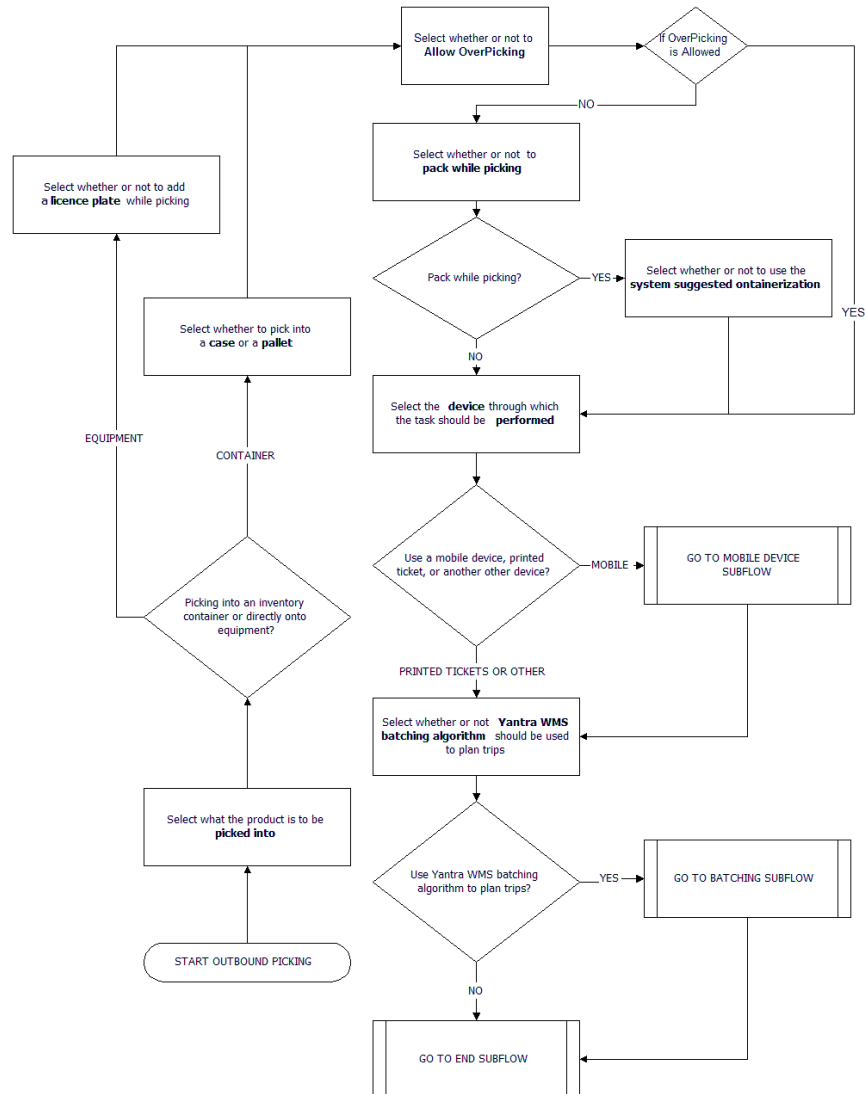
**Figure 12–3 Count Flow Task Type Logic**



## Outbound Picking Flow

For Outbound Picking task types, the Task Type Wizard uses the logic flow shown in [Figure 12–4, "Outbound Picking Task Type Logic"](#).

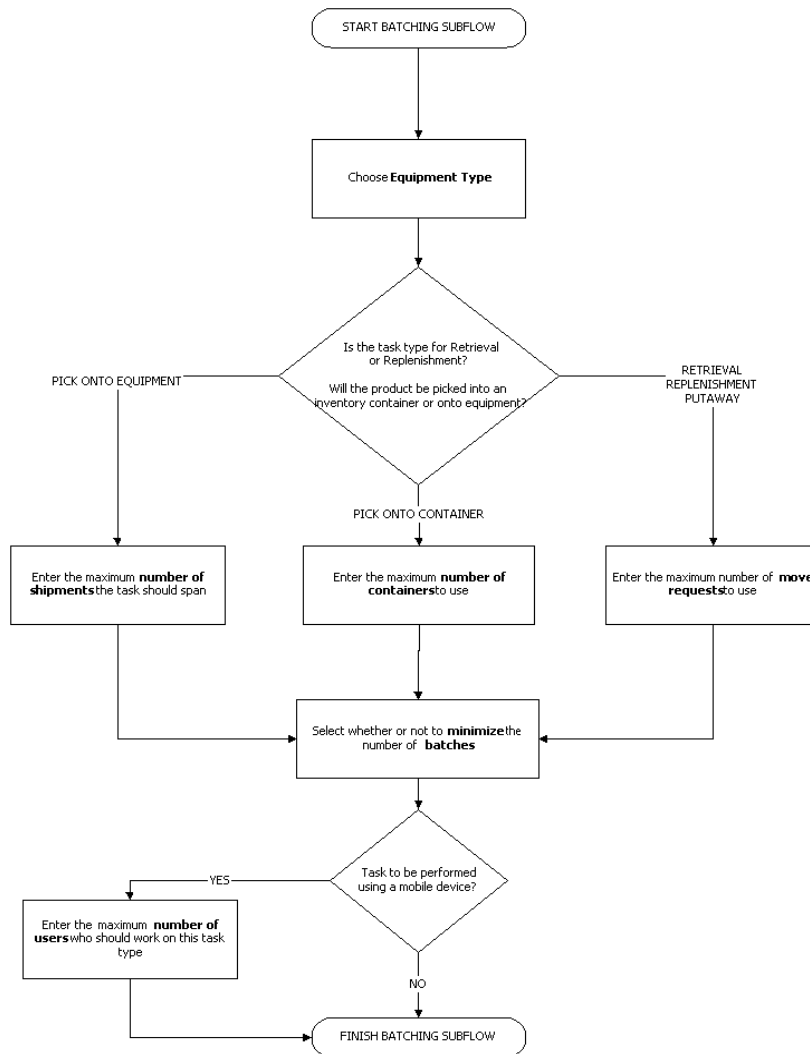
Figure 12–4 Outbound Picking Task Type Logic



## Batching Subflow

For task types that involve batching, the Task Type Wizard uses the logic flow shown in [Figure 12–5, "Batching Subflow Task Type Logic"](#).

**Figure 12–5 Batching Subflow Task Type Logic**

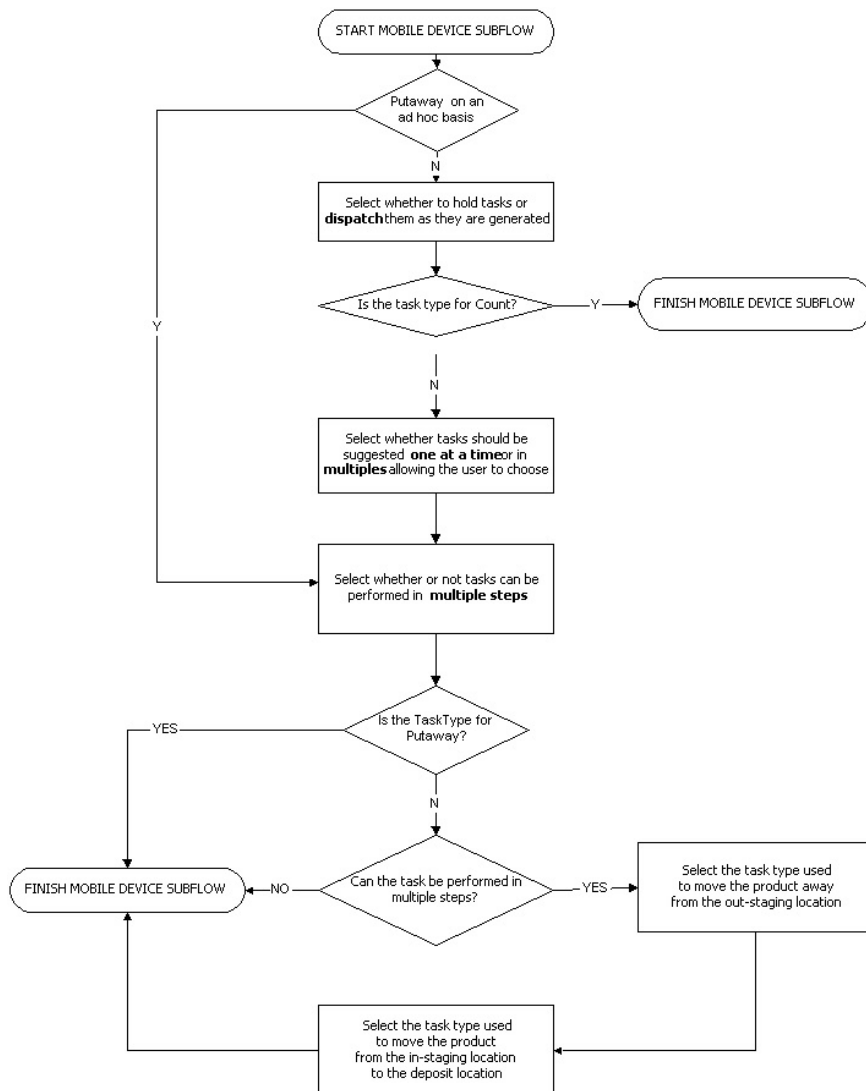


## Mobile Device Subflow

For task types that involve a mobile device, the Task Type Wizard uses the logic flow shown in [Figure 12–6, "Mobile Device Task Type Logic"](#).



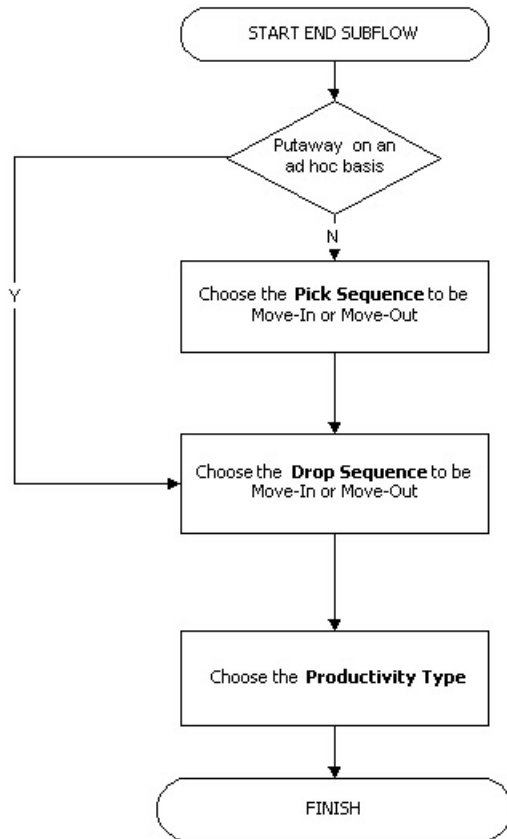
Figure 12–6 Mobile Device Task Type Logic



### End Flow

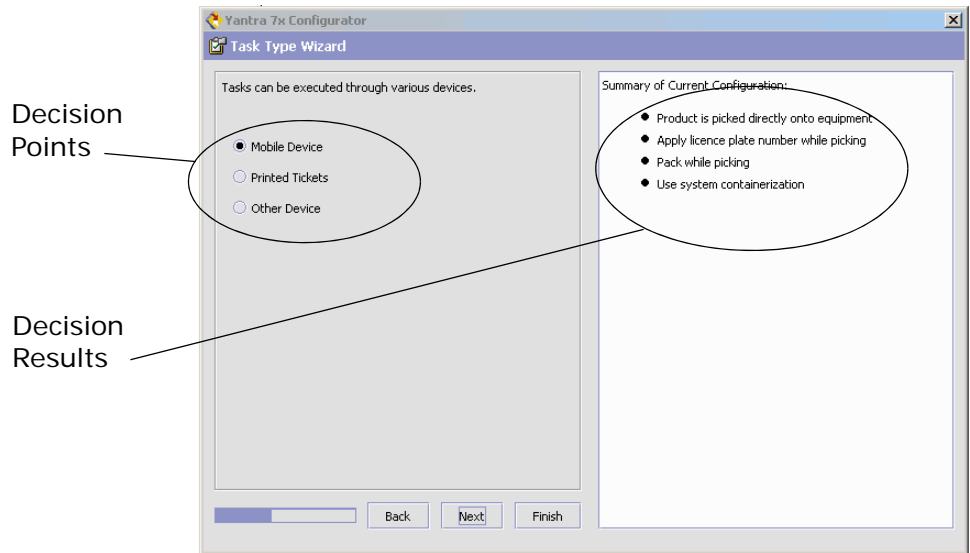
For each task type, the Task Type Wizard completes the logic flow shown in [Figure 12–7, "End Flow Task Type Logic"](#).

*Figure 12–7 End Flow Task Type Logic*




### 12.3.2 Creating a Task Type


Yantra 7x provides a Task Type Wizard that enables you to plan work flow activities.

**Figure 12–8 Task Type Wizard User Interface**

The Task Type Wizard displays configuration choices that are tailored to the Activity Group for which you are configuring a Task Type. As you make decisions, the wizard displays information in two panels as shown in [Figure 12–8, "Task Type Wizard User Interface"](#). The left panel displays decision points for you to take action on and the right panel displays the results of the decisions you have made.

To create a task type:

1. From the tree in the application rules side panel, choose Task Management > Task Types. The Task Types window is displayed.
2. Select the Activity Group within which you want to create a task type.
3. Choose . The Task Type Wizard displays.
4. For Task Type, enter an identifier.
5. For Description, enter a description of the Task Type. This description displays in the Task Types tree later.
6. From the Activity drop-down, choose an Activity. The items that appear on this list correspond with the Activity Group for which you are configuring a task type.

7. Choose Next. This begins the flow of logic as illustrated in [Section 12.3.1, "Understanding Task Type Logic Flows"](#) on page 887. Enter information in the applicable fields and choose Next to continue until all applicable decision points have been answered.
8. Choose .

**Note:** When outbound pick tasks are executed using printed tickets or other devices, the system automatically completes pick tasks that are open when performing pack operations.



### Task Assignment Sort Order

Task Types are prioritized based on the User Task Type priority (user skillsets) and Task Type priority (importance accorded to the task type).

When there is a conflict between the priority accorded to any said Task Type (where two task types have the same priority), any one of the task types are sorted and suggested for completion based on availability.

## 12.3.3 Modifying a Task Type


To modify a task type:

1. From the tree in the application rules side panel, choose Task Management > Task Types. The Task Types window is displayed.
2. Expand the Activity Group that contains the task type you want to modify, if needed.
3. Choose . The Task Type Wizard popup window appears.
4. Enter information in the applicable fields.
5. Choose .

## 12.3.4 Deleting a Task Type

To delete a task type:

1. From the tree in the application rules side panel, choose Task Management > Task Types. The Task Types window is displayed.

2. Expand the Activity Group that contains the task type you want to delete, if needed.
3. Select the Task Type you want to delete.
4. Choose .

## 12.4 Defining User Skills

User Skills define the types of tasks and the places within a node are associated with a specific Data Security Group.

Data Security Groups are used to control access to the data contained in specific document types and Enterprises within the Yantra Console. A data security group is used to further restrict the access to any Enterprises or document types that are a sub-set of the default access list. For more information about defining Data Security Groups, see *Yantra 7x Platform Configuration Guide*.

User Skills are based on data security settings that have been defined, and consist of user task types and user zones defined.

### User Task Types

User task types consist of the following criteria:

- Task type
- Task type priority

You can add, modify, and delete user task types as needed.

### User Zones

User zones consist of the following criteria:

- Type
- Zone
- Aisle

You can add, modify, and delete user task zones as needed.

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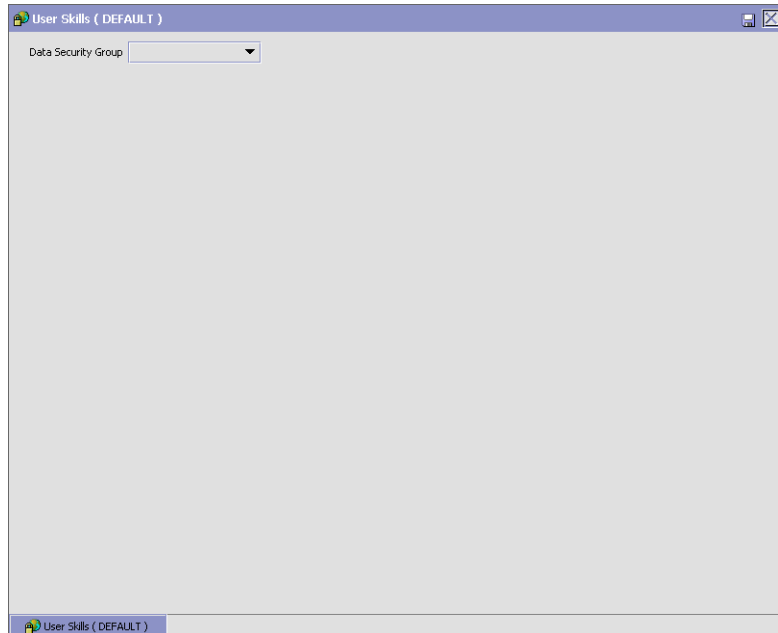
**Note:** Setting Up User Task Types are mandatory, while Setting Up User Zones is optional.


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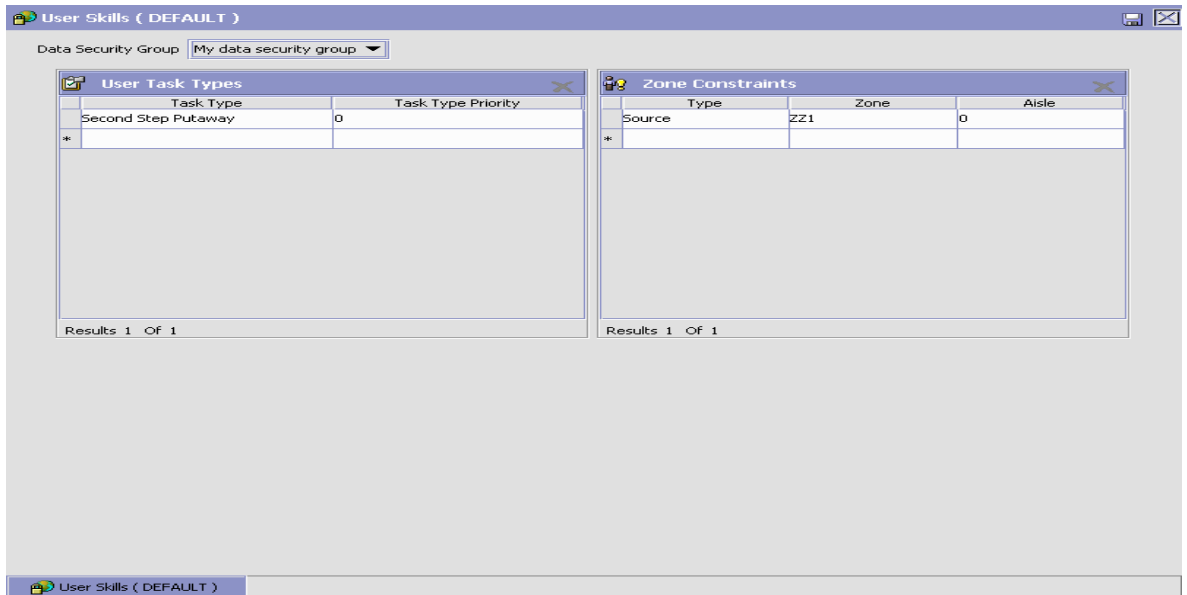
### 12.4.1 Adding a User Task Type

To add a user task type:

1. From the tree in the application rules side panel, choose Task Management > User Skills. The User Skills window is displayed.




2. Select the Data Security Group within which you want to define user skills. The User Skills window refreshes to display information as it pertains to the Data Security Group you selected.
3. In the User Task Types panel, select relevant Task Type and enter a Priority for the task type.
4. Choose .



### 12.4.1.1 Modifying a User Task Type Definition


To modify a user task type definition:

1. From the tree in the application rules side panel, choose Task Management > User Skills. The User Skills window is displayed.
2. Select the Data Security Group within which you want to define user skills. The User Skills window refreshes to display information as it pertains to the Data Security Group you selected.
3. In the User Task Types panel, select the Task Type you want to modify and enter new data as needed.
4. Choose .

### 12.4.1.2 Deleting a User Task Type Definition


To delete a user task type definition:

1. From the tree in the application rules side panel, choose Task Management > User Skills. The User Skills window is displayed.

2. Select the Data Security Group within which you want to delete a user task type. The User Skills window refreshes to display information as it pertains to the Data Security Group you selected.
3. In the User Task Types panel, select the task type you want to delete.
4. Choose .


### 12.4.2 Adding Zone Constraints

To add a zone constraint:

1. From the tree in the application rules side panel, choose Task Management > User Skills. The User Skills window is displayed.
2. Select the Data Security Group within which you want to define user skills. The User Skills window refreshes to display information as it pertains to the Data Security Group you selected.
3. In the Zone Constraints panel, select a Zone, select a zone type (for example, Source or Target), select a zone area (for example B1 or L1) and enter an aisle number.
4. Choose .

#### 12.4.2.1 Modifying a Zone Constraint

To modify a zone constraint:


1. From the tree in the application rules side panel, choose Task Management > User Skills. The User Skills window is displayed.
2. Select the Data Security Group within which you want to define user skills. The User Skills window refreshes to display information as it pertains to the Data Security Group you selected.
3. In the User Zone panel, select a Zone you want to modify and enter new data as needed.
4. Choose .

#### 12.4.2.2 Deleting a User Zone Definition

To delete a zone constraint:

1. From the tree in the application rules side panel, choose Task Management > User Skills. The User Skills window is displayed.



2. Select the Data Security Group within which you want to delete a user zone definition. The User Skills window refreshes to display information as it pertains to the Data Security Group you selected.
3. In the User Zone panel, select the zone you want to delete.
4. Choose .

## 12.5 Defining Productivity Types

Use Productivity Types for:

- [Setting Up Productivity Types](#)
- [Setting Up Purge Criteria](#)

### 12.5.1 Setting Up Productivity Types

Yantra 7x WMS tracks all activities performed at the user and activity level. This is measured against productivity metric associated with the activity. This enables a warehouse to calculate labor efficiency, and support activity-based compensation to all users.

Yantra 7x WMS models each activity in a warehouse by identifying variables applicable to the productivity of an activity. A warehouse defines Standard Allowable Minutes (SAM) for all variables in the activity. SAM values are determined after detailed time and motion study on each activity, which includes receiving, pallet moves, case replenishment, and special ticketing.

The different variables that would impact total time spent on an activity include the number of locations visited, UOMs and items in the trip. The additional factors are the number of aisles and distance traveled. If multiple trips are required to complete the activity, then that is also factored into the total time spent.

For example, replenishment from a bulk storage location has effort to pick an empty pallet, pick product into the pallet from multiple locations, drop off pallet into a location and traverse aisles while performing pick and drop off.

These distinct activities are captured by Standard Allowable Minutes (SAM). A productivity type is associated with a SAM and some additional attributes that define the capturing of the activity.


Activities executed through Yantra 7x WMS are associated with a task type. Manual tasks executed can be associated directly with a productivity type. For example, stacking of pallets, setting up of cartons for a cart.

Use Productivity Types for:

- [Creating a Productivity Type](#)
- [Modifying a Productivity Type](#)
- [Deleting a Productivity Type](#)

### 12.5.1.1 Creating a Productivity Type

To create a productivity type:

1. From the tree in the application rules side panel, choose Task Management > Productivity Types. The Productivity Types window is displayed.
2. Choose . The Productivity Type Details window is displayed.

Productivity Type Details ( MA03 / MA03 )

Productivity Type

Description

Capture Trip Level Metrics ☒ Yes ☐ No

**SAM Definition** **Productivity References** **Task Types**

SAM Per Productivity Batch  SAM Per Task

Location

SAM Per Source Location  SAM Per Source Aisle

SAM Per Target Location  SAM Per Target Aisle

Product

SAM Per Item  SAM Per Unit

SAM Per Case  SAM Per Pallet

Productivity Types ( MA03 / MA03 ) Productivity Type Details ( MA03 / MA03 )

When creating a Productivity Type, you must understand the following concepts:


- [Setting Up a Productivity Type's SAM Definition](#)
- [Setting Up a Productivity Type's Productivity References](#)
- [Setting Up a Productivity Type's Task Types](#)

#### 12.5.1.1.1 Setting Up a Productivity Type's SAM Definition

The productivity is tracked in terms of Standard Allowable Minutes for the productivity type.

For example, Number of Pallets is multiplied by Allowed Minutes Per Pallet to derive the Credited Minutes.

To set up a productivity type's SAM definition:

1. In Productivity Type Details window, choose the SAM Definition tab.
2. Enter information in the applicable fields. Refer [Table 12–1](#) for field value descriptions.
3. Choose .

**Table 12–1 SAM Definition Tab**

Field	Description
Productivity Type	<p>Enter a name for the productivity type.</p> <p>This indicates the type defined for this SAM. It is directly associated to a task type. Typical values are 'Pallet Moves', 'Case Moves', 'Loose Pick' and 'Unloading Cartons from Trailer'.</p>
Description	Enter a description for the productivity type.
Capture Trip Level Metrics	<p>Choose "Yes" to capture trip level metric. Choose "No" not to capture trip level metric.</p> <p>A trip either indicates a batch of activity done, or denotes the travel from the first pickup to the corresponding drop-off of inventory. This flag indicates that extra credits are given for the number of trips. For example, a user who travels through 50 locations in a single trip, versus a user who has to complete 5 trips to complete 50 locations.</p>
<b>SAM Definition</b>	
SAM per Productivity Batch	<p>Enter SAM per productivity batch in minutes.</p> <p>This indicates the time credit for users for each system created batch, or a trip, if trip level metrics is set to "Yes".</p> <p>In warehouses, that do not create batches and have the trip level metrics set to "No", this indicates the credit for the entire day.</p>
SAM per Task	<p>Enter SAM per task in minutes.</p> <p>This indicates the time credit for users per task performed. Typically either the SAM per Productivity Batch or SAM Per Task values are used to indicate SAM for a productivity type.</p>
<b>Location</b>	

**Table 12–1 SAM Definition Tab**

Field	Description
SAM per Source Location	Enter SAM per source location in minutes. This indicates the time credit for users per source location visited.
SAM per Source Aisle	Enter SAM per source aisle in minutes. This indicates the time credit for users per source aisle visited.
SAM per Target Location	Enter SAM per target location in minutes. This indicates the time credit for users per target location visited.
SAM per Target Aisle	Enter SAM per target aisle in minutes. This indicates the time credit for users per target aisle visited.
<b>Product</b>	
SAM per Item	Enter SAM per item in minutes. This indicates the time credit for users per item handled.
SAM per Unit	Enter SAM per unit in minutes. This indicates the time credit for users per unit handled.
SAM per Case	Enter SAM per case in minutes. This indicates the time credit for users per case handled.
SAM per Pallet	Enter SAM per pallet in minutes. This indicates the time credit for users per pallet handled.

Typically, a unique productivity type is created for each combination of type of equipment, UOM being handled.

SAM values for manual processes, such as picking using printed batch sheets, are manually input through the *Productivity Console*.


#### **12.5.1.1.2 Setting Up a Productivity Type's Productivity References**

A productivity reference indicates the transactional attribute being tracked for grouping purposes.

**Note:** A productivity type must be first created before a reference is associated with it. Click on the Save button to create the productivity type.

For example, for productivity type associated to a receipt or putaway task, receipt number will be the transactional reference. Productivity grouping is done at a user level, productivity type level, and reference level for a particular day or a trip level.

To set up a productivity type's productivity references:

1. In Productivity Type Details window, choose the Productivity References tab.
2. Enter information in the applicable fields. Refer [Table 12–2](#) for field value descriptions.
3. Choose .

**Table 12–2 Productivity References Tab**

Field	Description
Reference Name	<p>Choose the transactional reference associated with the productivity type.</p> <p>Multiple references to be tracked for productivity can be specified.</p> <p>For example, receipt productivity type has user id, receipt number and shipment number, which are tracked as references.</p>


#### 12.5.1.1.3 Setting Up a Productivity Type's Task Types

A productivity type is associated with a task type. The association with a task type allows for the SAM timings to be associated to an activity and the equipment being used.

For more information about the attributes associated with a task, see [Section 12.3, "Defining Task Types"](#) on page 887.

For example, a productivity type of putaway is associated with task types that are used to perform putaway.

To set up a productivity type's task types:

1. In Productivity Type Details window, choose the Task Types tab.
2. Enter information in the applicable fields. Refer [Table 12–3](#) for field value descriptions.
3. Choose .



Productivity Type Details ( MA03 / MA03 )

Productivity Type

Description

Capture Trip Level Metrics ☒ Yes ☐ No

**SAM Definition** **Productivity References** **Task Types**

**Task Types**

Task Type	Task Type Description
*	

Results: 0 Of 0

Productivity Types ( MA03 / MA03 ) Productivity Type Details ( MA03 / MA03 )



**Table 12–3 Task Types Tab**

Field	Description
Task Type	Choose the task type for the productivity type.
Task Type Description	Task type description is automatically populated for the task type selected.

### 12.5.1.2 Modifying a Productivity Type

Once a Productivity Type has been created, it can be modified.

To modify a productivity type:


1. From the tree in the application rules side panel, choose Task Management > Productivity Types. The Productivity Types window is displayed with the list of Productivity Types.
2. Choose the Productivity Type to be modified. Choose .
3. The Productivity Type Details window is displayed.
4. Enter information in the applicable fields.
5. Choose .

All modifications to the productivity type are applied to all future transactions.

For more information about modifying fields in the Productivity Type Details window, refer to [Section 12.5.1.1.1, "Setting Up a Productivity Type's SAM Definition"](#) on page 903, [Section 12.5.1.1.2, "Setting Up a Productivity Type's Productivity References"](#) on page 905, and [Section 12.5.1.1.3, "Setting Up a Productivity Type's Task Types"](#) on page 907.

### 12.5.1.3 Deleting a Productivity Type

To delete a productivity type:

1. From the tree in the application rules side panel, choose Task Management > Productivity Types. The Productivity Types window is displayed with the list of Productivity Types.
2. Choose the Productivity Type to be deleted.
3. Choose .

A productivity type cannot be deleted if there are productivity records associated to it. In such situations, it is recommended that the associated task types be removed.



## 12.5.2 Setting Up Purge Criteria

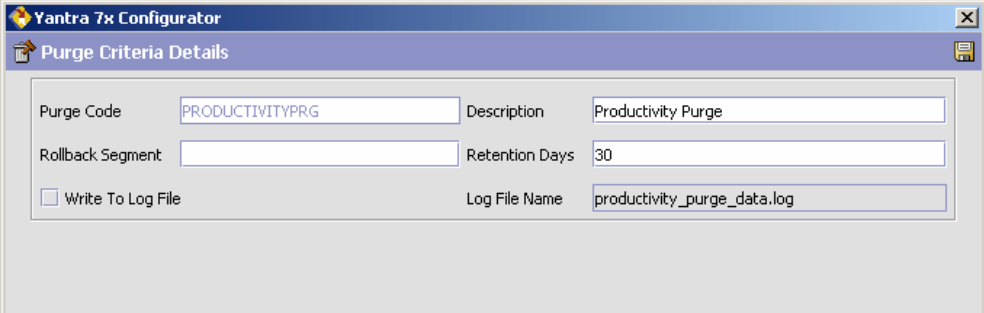
Transactional data collected by Yantra 7x WMS during the execution are periodically removed from the 'live' transactional tables. It is common to retain order related information for extended periods of time. There are history tables provided for relevant transactional tables to move data from the day-to-day 'live' tables to a historical table.

Purge is the process by which old data is removed from the system database. A purge minimizes the number of unused database records to increase search efficiency and reduces the size of the required physical disk.

### 12.5.2.1 Setting Up Purge Criteria

To set up purge criteria:

1. From the tree in the application rules side panel, choose Task Management > Productivity Types > Purge Criteria. The Purge Criteria List window is displayed.
2. In the Purge Criteria List window, choose . The Purge Criteria Details pop-up window appears.
3. Enter information in the applicable fields. Refer [Table 12–9](#) for field value descriptions.
4. Choose .



**Table 12–4 Purge Criteria Details Pop-up Window**

Field	Description
Purge Code	Identifies a purge program. This is a system defined code.
Description	Description of the purge.

**Table 12–4 Purge Criteria Details Pop-up Window**

Field	Description
Rollback Segment	<p>Defines the rollback segment that should be explicitly used for the purge transaction qualified by the purge code.</p> <p>This is useful when there are huge logical data sets that have to be purged. This is optional and used for order related purges.</p>
Retention Days	<p>Enter the number of days of data to be retained in the database (going backwards from the time the program runs). Make sure that your table size takes into account the number of retention days entered here.</p>
Write To Log File	<p>Check this box if you want purged data written to a log. The log can be backed up and used as a journal at a later date.</p>
Log File Name	<p>Enter a log file name. This is applicable only if 'Write To Log File' is checked. This file consists records of the specific table that is purged.</p> <p>The log file is created in the directory specified in the <code>yfs.purge.path</code> of <code>yfs.properties</code>. If a variable is introduced, then <code>yfs.purge.path</code> is ignored. For more information on using variables for the log file directory refer to <i>Yantra 7x Customization Guide</i>.</p> <p>For information about filename limitations related to internationalization, see the <i>Yantra 7x Localization Guide</i>.</p>

## 12.6 Defining Execution Exceptions

Exceptions that occur during the execution of tasks in the warehouse are categorized into exception codes. The codes are classified into three broad categories:

- Pick
- Deposit
- Skip

The exception code allows evaluation at the ship node level for efficiency and accuracy.

Use Execution Exceptions for:

- [Creating a Pick Execution Exception](#)
- [Modifying a Pick Execution Exception](#)
- [Deleting a Pick Execution Exception](#)
- [Creating a Deposit Execution Exception](#)
- [Modifying a Deposit Execution Exception](#)
- [Deleting a Deposit Execution Exception](#)
- [Creating a Skip Execution Exception](#)
- [Modifying a Skip Execution Exception](#)
- [Deleting a Skip Execution Exception](#)

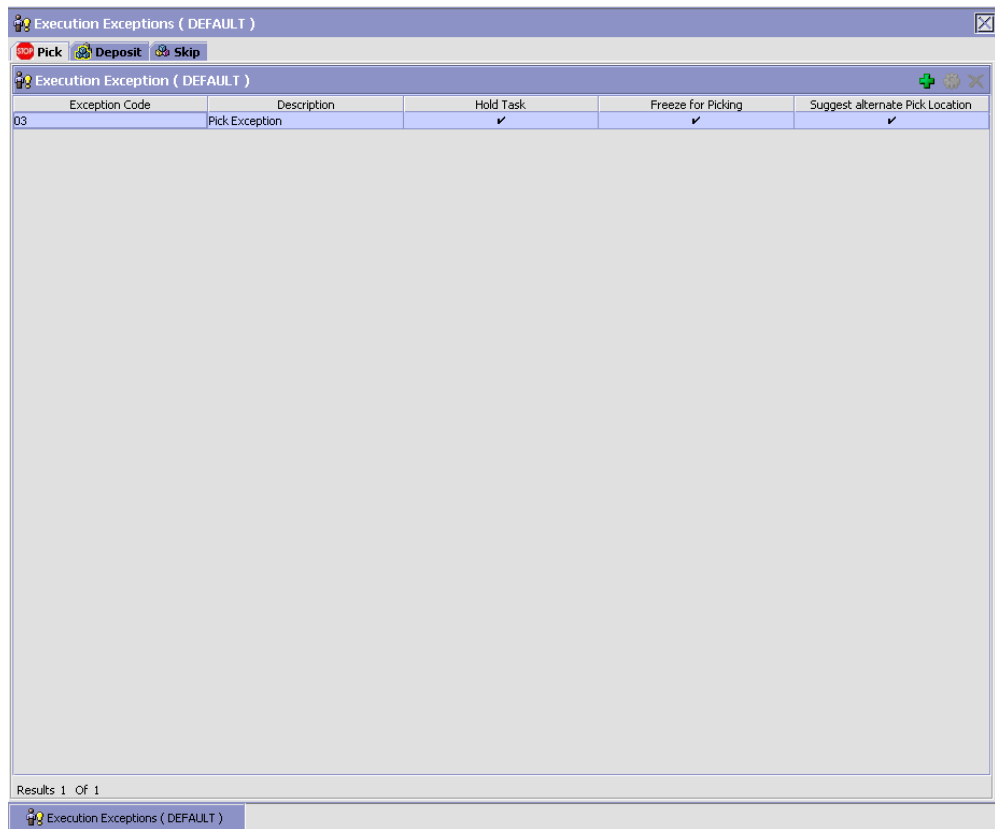
### 12.6.1 Creating a Pick Execution Exception



Exceptions that occur during the activity of picking a product for execution, being the first step of putaway, retrieval, or outbound pick process are defined here.

For example, a location being empty (or inventory shortage), when retrieval is requested from it.

To create a pick execution exception:

1. From the tree in the application rules side panel, choose Task Management > Execution Exceptions. The Execution Exception window is displayed.
2. Choose the Pick tab. The Pick tab window is displayed.



- 3. In the Pick tab window, choose . The Execution Exception Details window is displayed.
- 4. Enter information in the applicable fields. Refer [Table 12–5](#) for field value descriptions.
- 5. Choose .

**Table 12–5 Execution Exception Details Window**

Field	Description
Exception Code	Enter the name of the exception code.
Description	Enter a description for the exception code.
Exception Type	This is automatically populated by the system as "PICK".
Service Name	Enter service name for the execution. The service name indicates a service created using the Service Definition Framework. These services are used to incorporate enterprise specific business logic.
Inventory status for unavailable quantity	Choose the inventory status for unavailable quantity during pick due to this exception. The inventory status of the inventory in exception is automatically changed to this inventory status.
Hold Task	Select if the task being currently executed is put on hold due to this exception.
Freeze for picking	Select if the location is frozen for further pick and retrieval transactions due to this exception.
Suggested alternate Pick location	Select if an alternate may be suggested by the system automatically for this exception.
Freeze for putaway	This option is not relevant for pick execution and is grayed out.



**Table 12–5 Execution Exception Details Window**

Field	Description
Suggested alternate Deposit location	This option is not relevant for pick execution and is grayed out.
Mark target as full	This option is not relevant for pick execution and is grayed out.
Unassign User	This option is not relevant for pick execution and is grayed out.
Allow partial deposit of Inventory	Select this option to allow depositing a portion of the picked inventory.

### 12.6.2 Modifying a Pick Execution Exception

Once a Pick Execution Exception has been created, it can be modified.

To modify a pick execution exception:


1. From the tree in the application rules side panel, choose Task Management > Execution Exceptions. The Execution Exception window is displayed.
2. Choose the Pick tab. The Pick tab window is displayed with the list of Execution Exceptions.
3. Choose the Execution Exception to be modified.
4. Choose . The Execution Exception Details window is displayed.
5. Enter information in the applicable fields. Refer [Table 12–5](#) for field value descriptions.
6. Choose .

### 12.6.3 Deleting a Pick Execution Exception

To delete a pick execution exception:

1. From the tree in the application rules side panel, choose Task Management > Execution Exceptions. The Execution Exception window is displayed.
2. Choose the Pick tab. The Pick tab window is displayed with the list of Execution Exceptions.



3. Choose the Execution Exception to be deleted.
4. Choose .

### 12.6.4 Creating a Deposit Execution Exception

Exceptions that occur during the activity of depositing product after pick is completed during putaway, retrieval, or outbound pick process are defined here.

For example, exception recorded when the location to deposit is already full.

To create a deposit execution exception:

1. From the tree in the application rules side panel, choose Task Management > Execution Exceptions. The Execution Exception window is displayed.
2. Choose the Deposit tab. The Deposit tab window is displayed.

Execution Exceptions ( DEFAULT )



Pick Deposit Skip

Execution Exception

Exception Code	Description	Mark Target Location as full	Freeze for Putaway	Suggest alternate Deposit ...	Allow Partial Deposit
01	Deposit Exception	✓	✓	✓	
04	Deposit Exception			✓	
PART	Partial Deposit			✓	✓
PART1	Partial Deposit Only				✓

Results 4 Of 4

Execution Exceptions ( DEFAULT )

- 3. In the Deposit tab window, choose . The Execution Exception Details window is displayed.
- 4. Enter information in the applicable fields. Refer [Table 12–6](#) for field value descriptions.
- 5. Choose .

**Execution Exception Code Details**

Exception Code  Description

Exception Type  Service Name

Inventory status for unavailable quantity

☐ Hold Task
 ☐ Freeze for Picking

☐ Suggest alternate Pick location
 ☐ Freeze for Putaway

☐ Suggest alternate Deposit Location
 ☐ Mark Target Location as full

☐ Unassign User
 ☐ Allow partial deposit of Inventory

**Table 12–6 Execution Exception Details Window**

Field	Description
Exception Code	Enter the name of the exception code.
Description	Enter a description for the exception code.
Exception Type	This is automatically populated by the system as "DEPOSIT".
Service Name	Enter service name for the execution. The service name indicates a service created using the Service Definition Framework. These services are used to incorporate enterprise specific business logic.
Inventory status for unavailable quantity	This option is not relevant for deposit execution and is grayed out.
Hold Task	This option is not relevant for deposit execution and is grayed out.
Freeze for Picking	This option is not relevant for deposit execution and is grayed out.
Suggest alternate Pick location	This option is not relevant for deposit execution and is grayed out.
Freeze for Putaway	Select if the location is frozen for further putaway transactions due to this exception.
Suggest alternate Deposit location	Select if an alternate location may be suggested by the system automatically for this exception.

**Table 12–6 Execution Exception Details Window**

Field	Description
Mark Target Location as full	Select if the location does not have any more capacity. This indicates the capacity of the location on the system differs from the physical product in the location.
Unassign User	This option is not relevant for deposit execution and is grayed out.
Allow partial deposit of Inventory	Select this option to allow depositing a portion of the picked inventory.



**Note:** While creating a deposit execution exception, in addition to checking 'Suggest alternate Deposit location', it is required to check either 'Freeze for Putaway' or 'Mark Target Location as full' field.

This ensures that an alternate deposit location is suggested on exception, and prevents a location with exception from being suggested for deposit.

### 12.6.5 Modifying a Deposit Execution Exception


Once a Deposit Execution Exception has been created, it can be modified.

To modify a deposit execution exception:

1. From the tree in the application rules side panel, choose Task Management > Execution Exceptions. The Execution Exception window is displayed.
2. Choose the Deposit tab. The Deposit tab window is displayed with the list of Execution Exceptions.
3. Choose the Execution Exception to be modified.
4. Choose . The Execution Exception Details window is displayed.
5. Enter information in the applicable fields. Refer [Table 12–6](#) for field value descriptions.
6. Choose .

### 12.6.6 Deleting a Deposit Execution Exception

To delete a deposit execution exception:

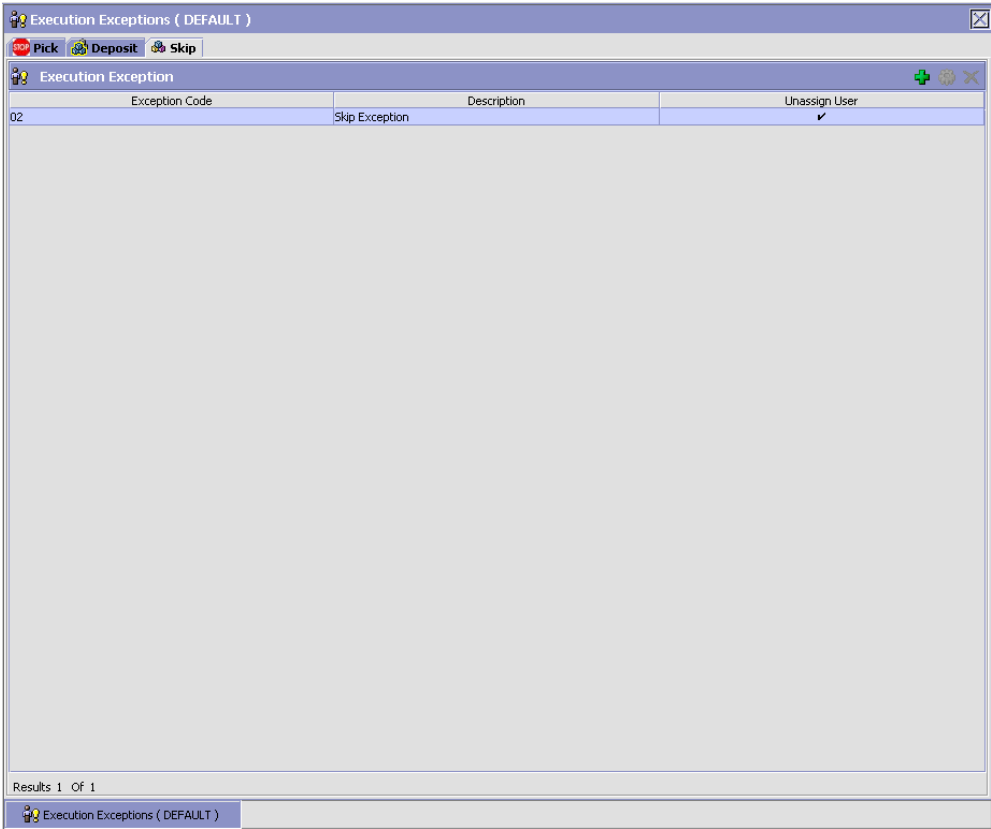
1. From the tree in the application rules side panel, choose Task Management > Execution Exceptions. The Execution Exception window is displayed.
2. Choose the Deposit tab. The Deposit tab window is displayed with the list of Execution Exceptions.
3. Choose the Execution Exception to be deleted.
4. Choose .



### 12.6.7 Creating a Skip Execution Exception

The exceptions that are recorded when a user skips a task that is suggested, are recorded here.

To create a skip execution exception:

1. From the tree in the application rules side panel, choose Task Management > Execution Exceptions. The Execution Exception window is displayed.
2. Choose the Skip tab. The Skip tab window is displayed.



- 3. In the Skip tab window, choose . The Execution Exception Details window is displayed.
- 4. Enter information in the applicable fields. Refer [Table 12–7](#) for field value descriptions.
- 5. Choose .

**Table 12–7 Execution Exception Details Window**

Field	Description
Exception Code	Enter the name of the exception code.
Description	Enter a description for the exception code.
Exception Type	This is automatically populated by the system as "SKIP".
Service Name	Enter service name for the execution. The service name indicates a service created using the Service Definition Framework. These services are used to incorporate enterprise specific business logic.
Inventory status for unavailable quantity	This option is not relevant for skip execution and is grayed out.
Hold Task	This option is not relevant for skip execution and is grayed out.
Freeze source for move out	This option is not relevant for skip execution and is grayed out.
Suggested alternate Pick location	This option is not relevant for skip execution and is grayed out.
Freeze source for move in	This option is not relevant for skip execution and is grayed out.
Suggested alternate Deposit location	This option is not relevant for skip execution and is grayed out.



**Table 12–7 Execution Exception Details Window**

Field	Description
Mark target as full	This option is not relevant for skip execution and is grayed out.
Unassign User	Select if another user may execute the task.
Allow partial deposit of Inventory	Select this option to allow depositing a portion of the picked inventory.

### 12.6.8 Modifying a Skip Execution Exception


Once a Skip Execution Exception has been created, it can be modified.

To modify a skip execution exception:

1. From the tree in the application rules side panel, choose Task Management > Execution Exceptions. The Execution Exception window is displayed.
2. Choose the Skip tab. The Skip tab window is displayed with the list of Execution Exceptions.
3. Choose the Execution Exception to be modified.
4. Choose . The Execution Exception Details window is displayed.
5. Enter information in the applicable fields. Refer [Table 12–7](#) for field value descriptions.
6. Choose .

### 12.6.9 Deleting a Skip Execution Exception

To delete a skip execution exception:

1. From the tree in the application rules side panel, choose Task Management > Execution Exceptions. The Execution Exception window is displayed.
2. Choose the Skip tab. The Skip tab window is displayed with the list of Execution Exceptions.
3. Choose the Execution Exception to be deleted.
4. Choose .



## 12.7 Defining Transaction Repository

A repository is a logical collection of entities that define the business process workflow. Transaction Repository includes the following entities:

- Transactions
- Conditions
- Actions
- Services

Yantra 7x provides a base repository for each of the system defined process types. Some of the entities within a repository are copied when creating a new document type. For more information about creating a new document type, see the *Yantra 7x Platform Configuration Guide*.


For more information about defining process type details, see *Yantra 7x Platform Configuration Guide*.

### 12.7.1 Transactions

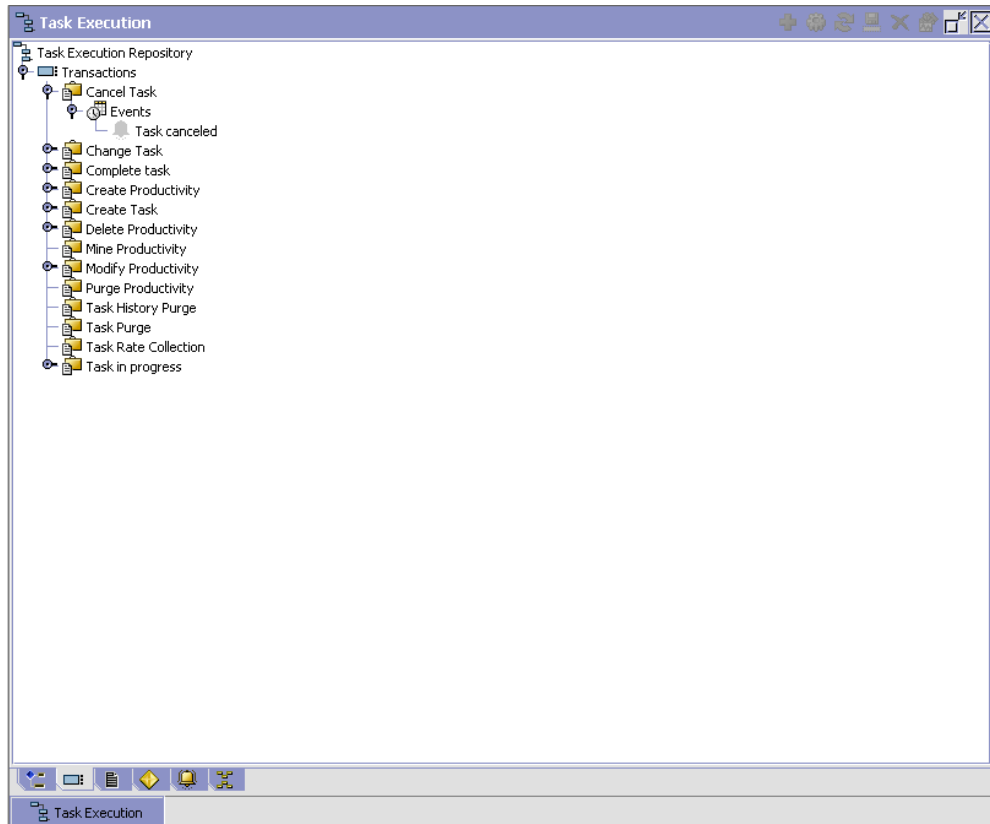
Every process type has a set of base transactions defined for it. A transaction is a logical unit of work that is necessary for performing activity within Yantra 7x. Base transactions are predefined transactions that contain information about how the transaction behaves, such as how many copies of a transaction can be kept in a process type and whether or not it can have configurable base pick and drop statuses. Base transactions can be used to create new transactions. These transactions can be changed within the limits defined in the base transaction.

For more information about Transactions, see *Yantra 7x Platform Configuration Guide*.

To view the transaction repository details for task management:

1. From the tree in the application rules side panel, choose Task Management > Transaction Repository. The Task Execution window is displayed.
2. In the Task Execution window, choose .
3. The Transactions tab window is displayed.

For more information about creating and modifying Transactions, see *Yantra 7x Platform Configuration Guide*.



**Table 12–8 WMS Inventory - Transactions Tab Window**

Field	Description
Cancel Task	This transaction represents the cancellation of a task.
Change Task	This transaction represents the modification of a task.
Complete Task	This transaction represents the completion of a task.
Create Productivity	This transaction represents the creation of a productivity.
Create Task	This transaction represents the creation of a task.

**Table 12–8 WMS Inventory - Transactions Tab Window**


Field	Description
Delete Productivity	This transaction represents the deletion of a productivity.
Mine Productivity	This transaction represents mine productivity.
Modify Productivity	This transaction represents the modification of a productivity.
Purge Productivity	This transaction represents a productivity that may now be purged.
Task History Purge	This transaction represents a task history that may now be purged.
Task Purge	This transaction represents a task that may now be purged.
Task Rate Collection	This transaction represents the collection of a task rate.
Task in Progress	This transaction represents a task in progress.

## 12.7.2 Conditions

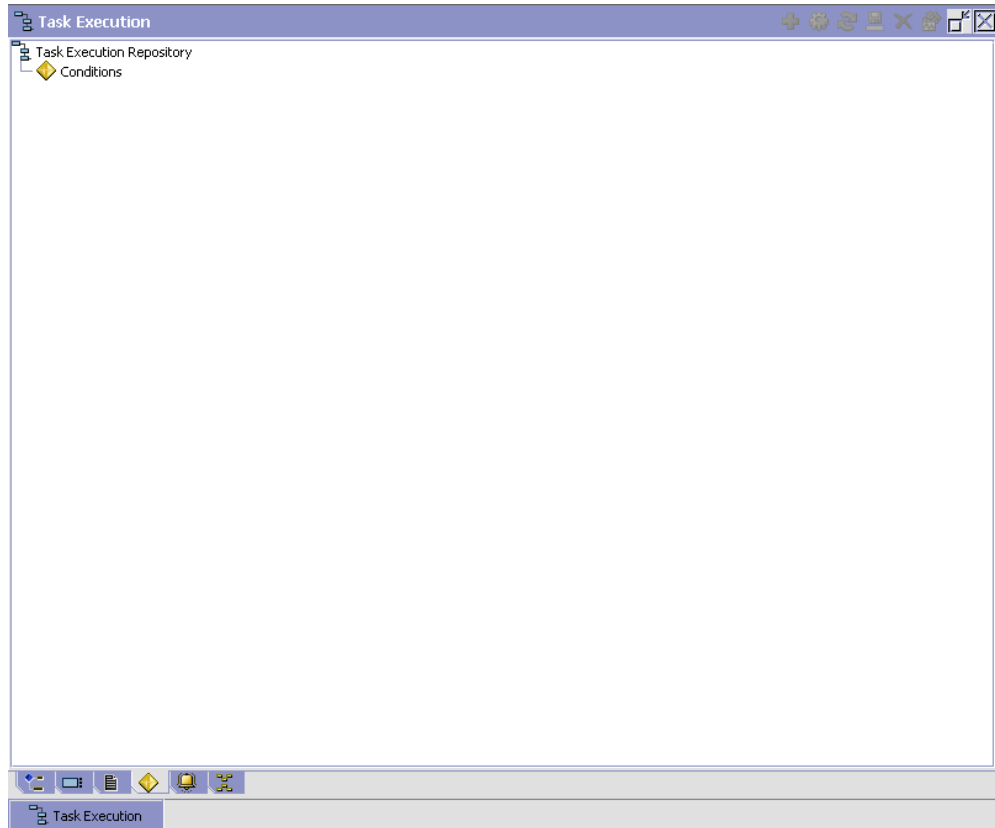
A **condition** matches document type attributes against decision points and routes the documents to different paths based on the specified attribute and value combinations. The document type attributes against which conditions can be created are predefined in Yantra 7x. You can use these attributes in any combination or you can create conditions that execute the appropriate application logic for specific circumstances.

For more information about Conditions, see *Yantra 7x Platform Configuration Guide*.

To view the condition repository details for Task Management:

1. From the tree in the application rules side panel, choose Task Management > Transaction Repository. The Task Execution window is displayed.
2. In the Task Execution window, choose .
3. The Conditions tab window is displayed.

For more information about creating and modifying Conditions, see *Yantra 7x Platform Configuration Guide*.



Yantra 7x WMS default transaction repository does not have any conditions specified.


### 12.7.3 Actions

An **action** is a process or program that is triggered by an event. These processes and programs send user alert notifications and automatically resolve issues.

For example, when a variance task is created (the event), you can set an action to send the enterprise user an e-mail.

For more information about Actions, see *Yantra 7x Platform Configuration Guide*.

To view the action repository details for Task Management:

1. From the tree in the application rules side panel, choose Task Management > Transaction Repository. The Task Execution window is displayed.
2. In the Task Execution window, choose .
3. The Actions tab window is displayed.

For more information about viewing the action repository details, see [Section 3.12.3, "Actions"](#).


For more information about creating and modifying Actions, see *Yantra 7x Platform Configuration Guide*.

## 12.7.4 Service Definitions

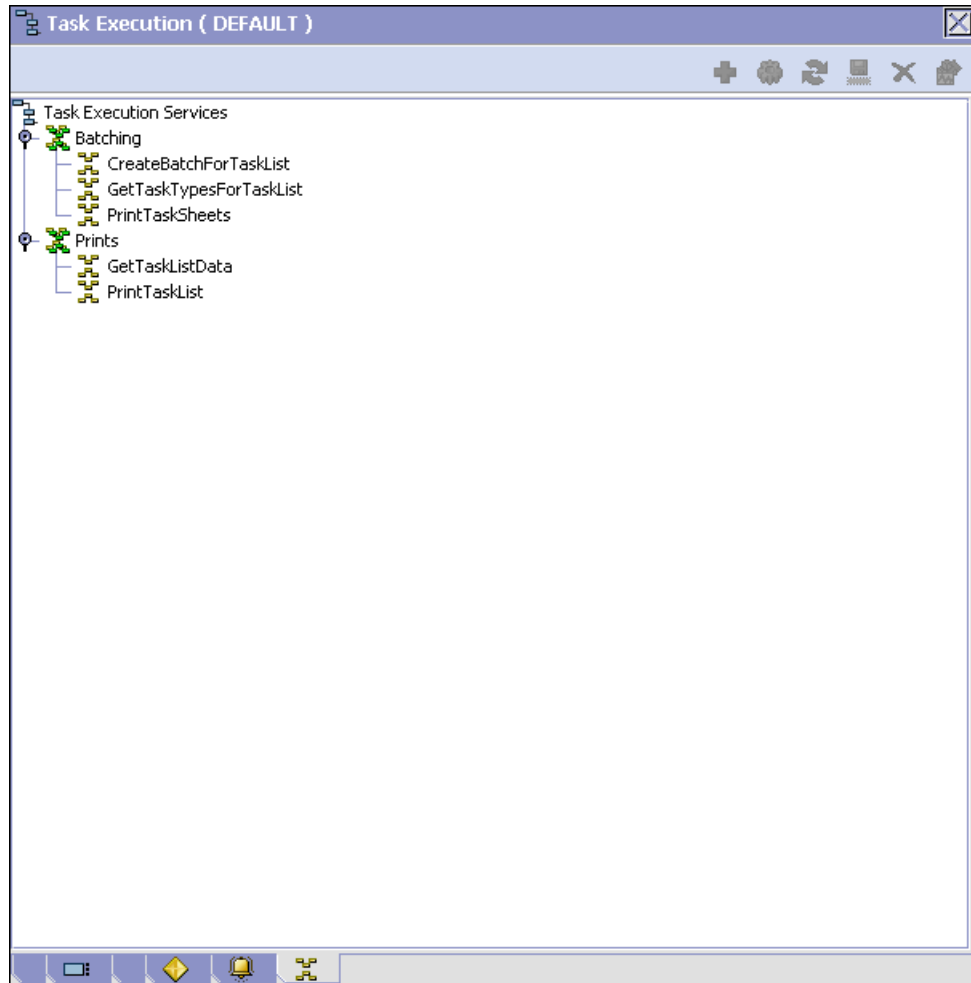
Service definitions are a representation of the logic that regulates document workflow services. The Service Builder is a graphical interface that enables you to create a graphical representation of these *services*.

For more information about Service Definitions, see *Yantra 7x Platform Configuration Guide*.

To view the service definition repository details for Task Management:

1. From the tree in the application rules side panel, choose Task Management > Transaction Repository. The Task Execution window is displayed.
2. In the Task Execution window, choose .
3. The Service Definitions tab window is displayed.

For more information about creating and modifying Service Definitions, see *Yantra 7x Platform Configuration Guide*.



Yantra 7x WMS default transaction repository does not have any service definitions specified.

## 12.8 Defining Purge Criteria

Transactional data collected by Yantra 7x WMS during the execution are periodically removed from the 'live' transactional tables. It is common to

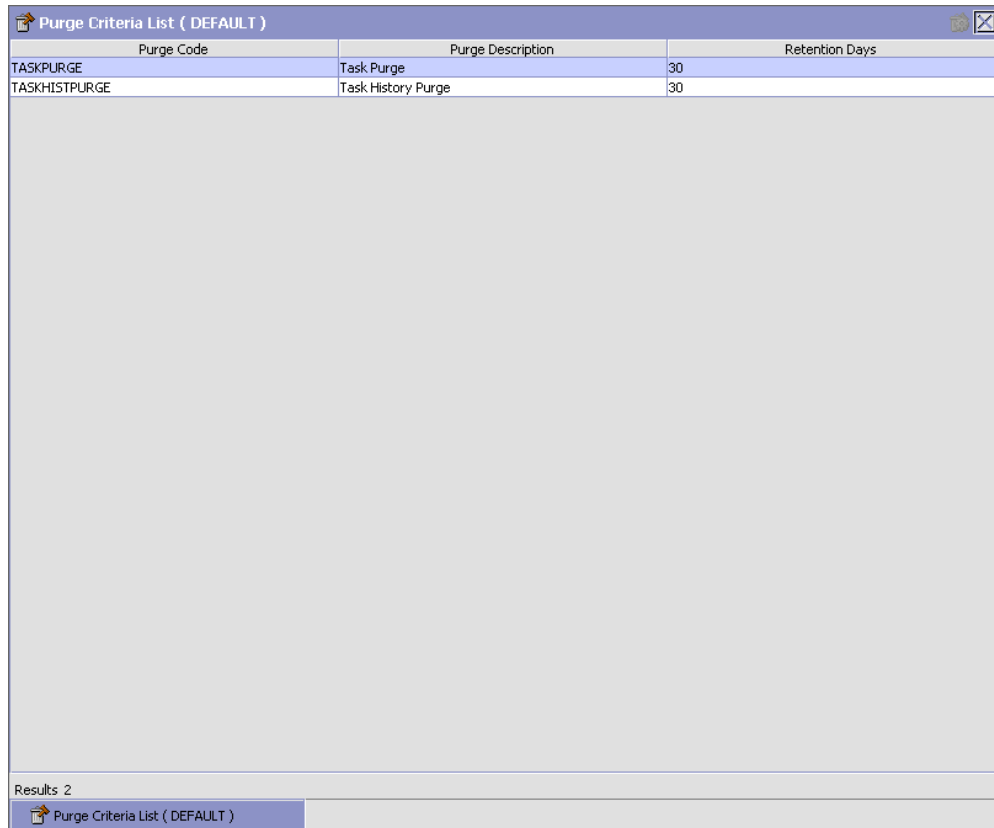
retain order related information for extended periods of time. There are history tables provided for relevant transactional tables to move data from the day-to-day 'live' tables to a historical table.

Purge is the process by which old data is removed from the system database. A purge minimizes the number of unused database records to increase search efficiency and reduces the size of the required physical disk.

### 12.8.1 Setting Up Purge Criteria

To set up purge criteria:



1. From the tree in the application rules side panel, choose Task Management > Purge Criteria. The Purge Criteria List window is displayed.



Purge Code	Purge Description	Retention Days
TASKPURGE	Task Purge	30
TASKHISTPURGE	Task History Purge	30

Results 2

Purge Criteria List ( DEFAULT )

2. In the Purge Criteria List window, choose Purge Criteria to be set up.
3. Choose . The Purge Criteria Details pop-up window appears.
4. Enter information in the applicable fields. Refer [Table 12–9](#) for field value descriptions.
5. Choose .



Yantra 7x Configurator

Purge Criteria Details

Purge CodeTASKPURGE

DescriptionTask Purge

Rollback Segment

Retention Days30

☐ Write To Log File

Log File Name

task\_purge\_data.log

Table 12–9 Purge Criteria Details Pop-up Window

Field	Description
Purge Code	Identifies a purge program. This is a system defined code.
Description	Description of the purge.
Rollback Segment	Defines the rollback segment that should be explicitly used for the purge transaction qualified by the purge code.  This is useful when there are huge logical data sets that have to be purged. This is optional and used for order related purges.
Retention Days	Enter the number of days of data to be retained in the database (going backwards from the time the program runs). Make sure that your table size takes into account the number of retention days entered here.

**Table 12–9** *Purge Criteria Details Pop-up Window*

Field	Description
Write To Log File	Check this box if you want purged data written to a log. The log can be backed up and used as a journal at a later date.
Log File Name	<p>Enter a log file name. This is applicable only if 'Write To Log File' is checked. This file consists records of the specific table that is purged.</p> <p>The log file is created in the directory specified in the <code>yfs.purge.path</code> of <code>yfs.properties</code>. If a variable is introduced, then <code>yfs.purge.path</code> is ignored. For more information on using variables for the log file directory refer to <i>Yantra 7x Customization Guide</i>.</p> <p>For information about filename limitations related to internationalization, see the <i>Yantra 7x Localization Guide</i>.</p>

## Configuring System Administration

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System Administration configuration defines the common codes for, and set up the Devices, Bar Codes, and Prints.

Use System Administration for:

- [Defining Devices](#)
- [Defining Bar Codes](#)
- [Defining Prints](#)

### 13.1 Defining Devices

A warehouse consists of a number of hand-held and stationary devices. These devices have their unique definitions and sometimes are associated specifically to stations or equipment. Examples of devices include printer, RF scanner and weighing scale.

Each individual group of devices is represented as a device type and sub-type combination. A device and its unique communication requirements are represented when each device is configured.

Use Devices to set-up:

- [Defining a Device Type](#)
- [Defining a Device Sub Type](#)
- [Defining a Device](#)

#### 13.1.1 Defining a Device Type

All devices are grouped in Yantra 7x WMS to a Device Type. An individual unit is defined as a sub type for a device type.

For example, device types include RF scanners, printers, and weighing scale.

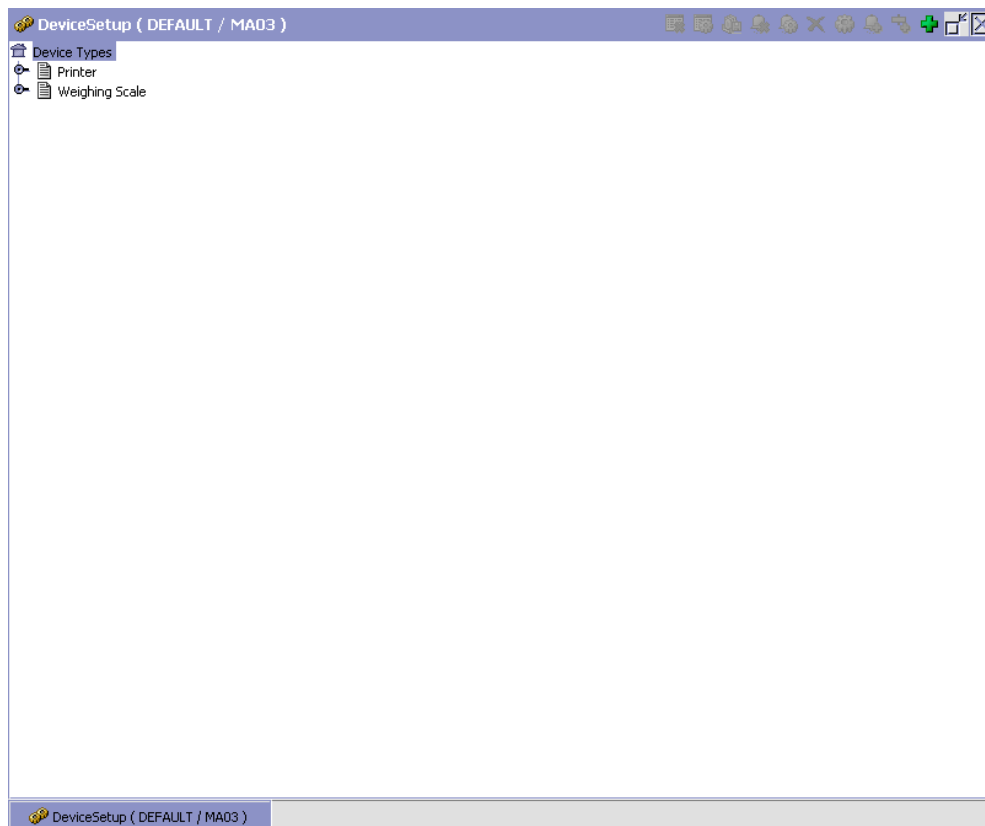
Use Device Type for:



- [Creating a Device Type](#)
- [Modifying a Device Type](#)
- [Deleting a Device Type](#)

### **13.1.1.1 Creating a Device Type**

To create a device type:

1. From the tree in the application rules side panel, choose System Administration > Devices. The Device Setup window appears.



2. In the Device Setup window, choose . The Device Type pop-up window is displayed.
3. Enter information in the applicable fields. Refer [Table 13–1](#) for field value descriptions.
4. Choose .

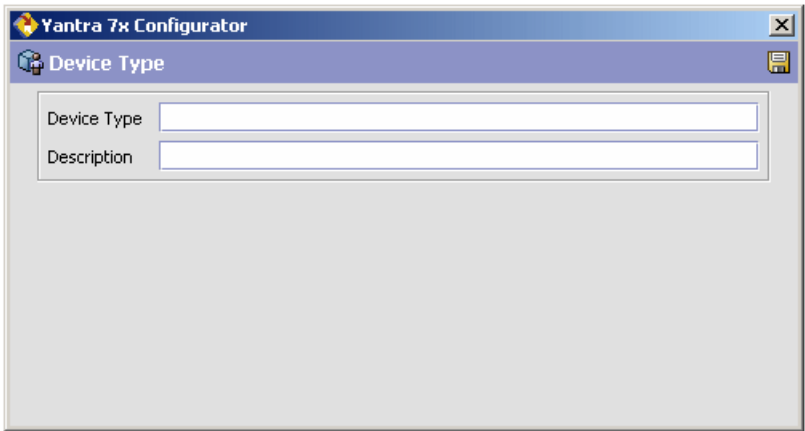




Table 13–1 Device Type Pop-up Window

Field	Description
Device Type	Enter a name for the device type. This helps in identifying the type of device. For example, device type may be weighing scale or printer.
Description	Enter a brief description for the device type.

13.1.1.2 Modifying a Device Type


Once a Device Type has been created, it can be modified.

To modify a device type:

1. From the tree in the application rules side panel, choose System Administration > Devices.
2. The Device Setup window appears with the list of Device Types.
3. Select the Device Type to be modified. Choose .
4. The Device Type pop-up window appears.
5. Enter information in the applicable fields. Refer [Table 13–1](#) for field value descriptions.
6. Choose .

### 13.1.1.3 Deleting a Device Type

To delete a device type:

1. From the tree in the application rules side panel, choose System Administration > Devices.
2. The Device Setup window appears with the list of Device Types.
3. Select the Device Type to be deleted. Choose .

## 13.1.2 Defining a Device Sub Type

A Device Sub Type categorizes a device type.

For example, a device type of Printers is further categorized or sub-typed into HP LaserJet 5P, and Zebra 170. Each individual sub-type allows for device configuration and its respective parameters.



Other examples include sub types of hand-held scanner models and equipment mounted models used under a device type of RF Scanners. For more information about setting up a device sub-type for a weighing scale, see [Appendix D, "Setting Up a Weighing Scale"](#).

Use Device Sub Type for:

- [Creating a Device Sub Type](#)
- [Modifying a Device Sub Type](#)
- [Deleting a Device Sub Type](#)

### 13.1.2.1 Creating a Device Sub Type

To create a device sub type:

1. From the tree in the application rules side panel, choose System Administration > Devices. The Device Setup window appears.
2. In the Device Setup window, select Device Type whose Device Sub Type is to be created.
3. Choose . The Device Sub Type pop-up window appears.
4. Enter information in the applicable fields. Refer [Table 13–2](#) for field value descriptions.
5. Choose .

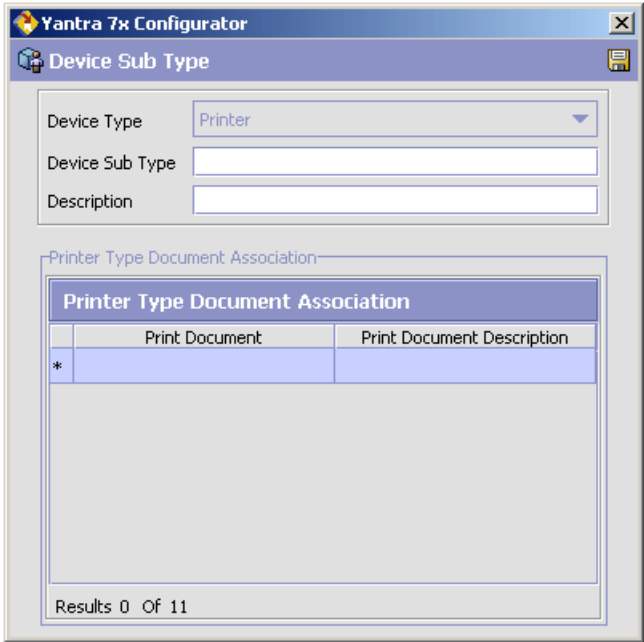


Table 13–2 Device Sub Type Pop-up Window

Field	Description
Device Type	Device Type indicates the device type for which the device sub type is being created. This is populated by the system, based on the selection of device type in the Device Setup window.
Device Sub Type	Enter a name for the device sub type.
Description	Enter a brief description for the device sub type.



13.1.2.2 Modifying a Device Sub Type

Once a Device Sub Type has been created, it can be modified.

To modify a device sub type:


1. From the tree in the application rules side panel, choose System Administration > Devices. The Device Setup window appears.



2. In the Device Setup window, select the Device Type whose Device Sub Type is to be modified. The list of Device Sub Type is now displayed.
3. Select the Device Sub Type to be modified. Choose .
4. The Device Sub Type pop-up window appears.
5. Enter information in the applicable fields. Refer [Table 13–2](#) for field value descriptions.
6. Choose .

### 13.1.2.3 Deleting a Device Sub Type

To delete a device sub type:

1. From the tree in the application rules side panel, choose System Administration > Devices. The Device Setup window appears.
2. In the Device Setup window, select the Device Type whose Device Sub Type is to be deleted. The list of Device Sub Type is now displayed.
3. Select the Device Sub Type to be deleted.
4. Choose .

## 13.1.3 Defining a Device

A device represents an actual device existing on the network, or directly connected to a station or equipment. All instances of a device type and sub-type combination require to be defined as devices.

For example, a warehouse that has five HP LaserJet 5P printers and four Zebra R140 printers will have all the nine printers configured as devices.

One or more devices can be associated with equipment and/or station.

For more information about associating a device with equipment, see [Section 3.10.5, "Setting Up an Equipment Device Association"](#) on page 93.

For more information about associating a device with station, see [Section 3.11.5, "Setting Up a Station Device Association"](#) on page 106.

Use Device for:

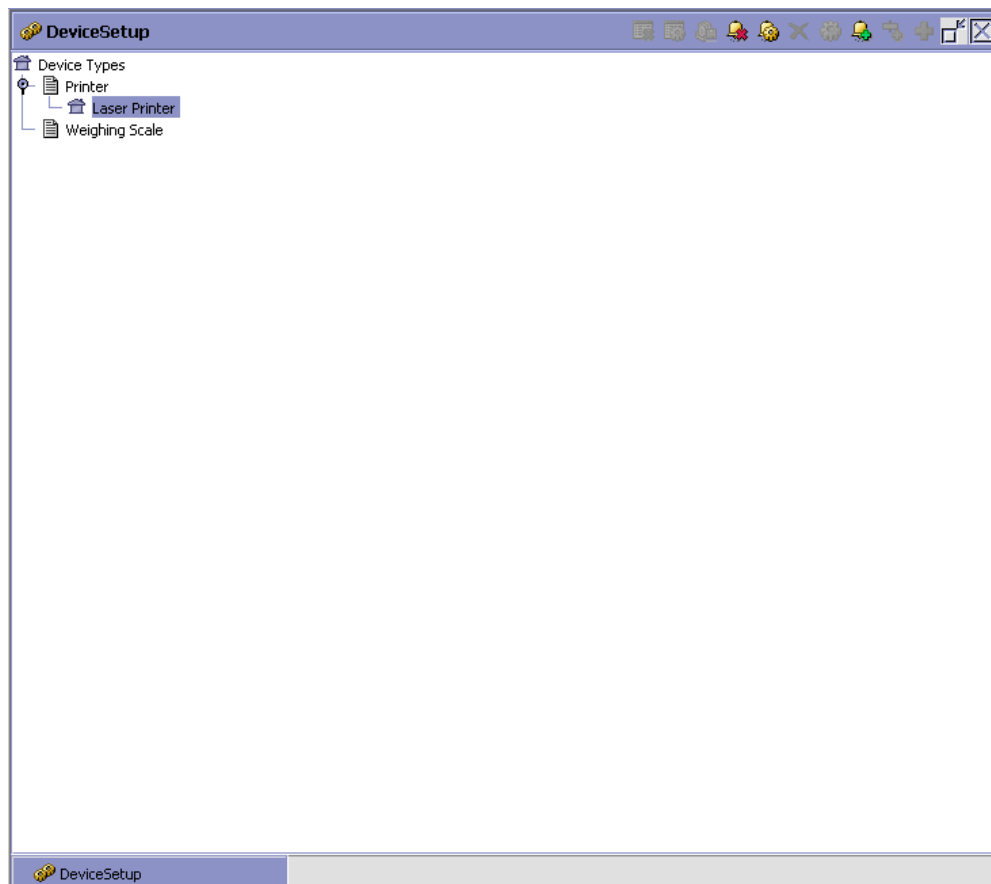
- [Creating a Device](#)



- [Creating a New Device from a Device](#)
- [Modifying a Device](#)
- [Deleting a Device](#)

### 13.1.3.1 Creating a Device

To create a device:

1. From the tree in the application rules side panel, choose System Administration > Devices. The Device Setup window appears.
2. In the Device Setup window, select the relevant Device Type and Device Sub Type whose Device is to be created.



3. Choose . The Device pop-up window appears.
4. Enter information in the applicable fields. Refer [Table 13–2](#) for field value descriptions.
5. Choose .

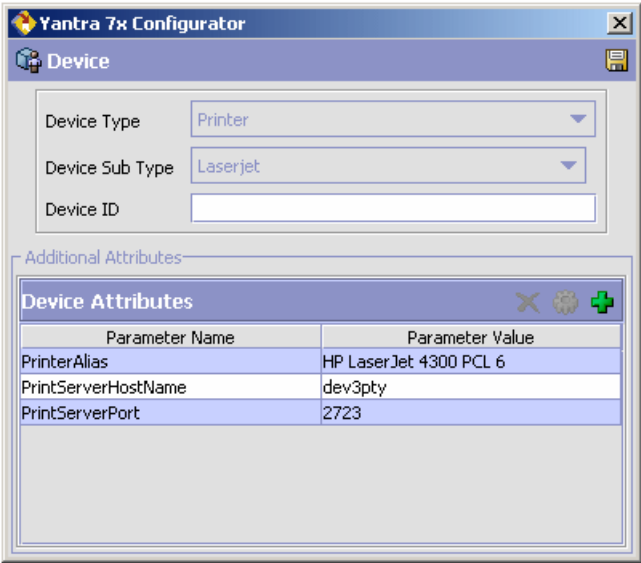


Table 13–3 Device Pop-up Window

Field	Description
Device Type	Device Type indicates the device type for which the device is being created.  This is populated by the system, based on the selection of device type in the Device Setup window.
Device Sub Type	Device Sub Type indicates the device sub type for which the device is being created.  This is populated by the system, based on the selection of device sub type in the Device Setup window.
Device ID	Enter the name for the device.  This identifies the device throughout the system.
Device Attributes	<b>This indicates the additional attributes of the device.</b>  <b>For more information about setting up a device attribute, refer to <a href="#">Section 13.1.3.1.1, "Setting Up a Device Attribute"</a> on page 952.</b>

*Yantra 7x WMS supplies a list of standard device type, sub type and individual devices that is supported. The definition of a new device type, sub type and resultant device requires the creation of the appropriate attributes that define the communication with the device.*

The list of attributes that control communication to a printer are:

- **DropDirectory** - The directory where the print files are 'dropped' by Yantra 7x Application Server. The Software Print Server keeps polling this directory to pick up print requests.  
When mentioning the directory structure you can use the full path name or replace the path name with a variable. For more information on including this variable see *Yantra 7x Platform Configuration Guide*.

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**Note:** The DropDirectory attribute will appear in the Yantra 7x Configurator only if the property `yfs.software.tcpip.sockets` defined in `yfs.properties` is set to 'N'.

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- **PrinterAlias** - The printer alias as configured in the Software printer setup.

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**Note:** While setting up a Printer device in Yantra 7x WMS, please ensure that the Printer Alias is exactly the same as specified in the Software printer set-up.

In instances where a network printer is used, please ensure that the Printer Alias on Yantra 7x WMS does NOT contain the prefix "\\". However, Software may require the printer to be defined by prefixing "\\".

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- **PrinterServerHostName** - The host name for the Software Print Server. While IP Address may be sufficient, the use of host name is recommended for ease of maintenance.
- **PrintServerPort** - The port on which Software Print Server listens for print requests. By default, the print server port for Software Print Server is 2723.

**Note:** The PrinterServerHostName and PrintServerPort attributes will appear in the Yantra 7x Configurator only if the property `yfs.software.tcpip.sockets` defined in `yfs.properties` is set to 'Y'.

The list of attributes that control communication to a weighing scale are:

- ClassName
- PortId
- BaudRate
- DataBits
- StopBits
- Parity
- FlowIn
- FlowOut

**Note:** The ClassName for the Mettler Toledo Weighing Scale is `com.yantra.ycp.ui.io.YCPToledoPSImpl`. For specifications pertaining to the other attributes, please refer the weighing scale user manual.


### 13.1.3.1.1 Setting Up a Device Attribute

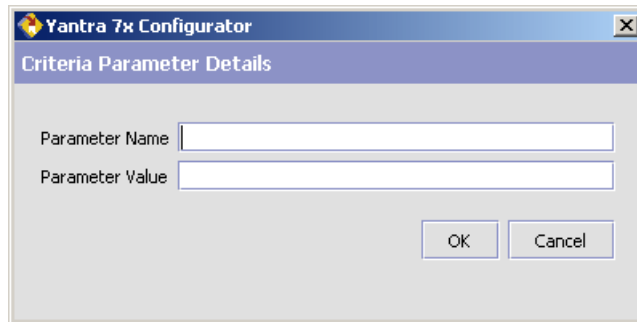
Device attributes define the method of communication with the appropriate device. A HP LaserJet printer will have a different parameter list in comparison to a weighing scale. Each individual brand of printer also has its own unique set of parameters and values.

For example, a weighing scale connected through a serial port has specific device attributes including stop bits, parity.

To set up a device attribute:

1. In Device Attributes panel of the Device pop-up window, choose .

2. The Criteria Parameter Details pop-up window appears.
3. Enter information in the applicable fields. Refer [Table 13–4](#) for field value descriptions.
4. Choose .





**Table 13–4** *Criteria Parameter Details Pop-up Window*

Field	Description
Parameter Name	Enter the parameter name for the device attribute.
Parameter Value	Enter the parameter value for the device attribute.

### 13.1.3.2 Creating a New Device from a Device

To create a new device from a device:

1. From the tree in the application rules side panel, choose System Administration > Devices. The Device Setup window appears.
2. In the Device Setup window, select the relevant Device Type and Device Sub Type whose Device is to be copied.
3. The list of Devices is displayed. Select the Device to be copied to create a new device.
4. Choose . The Device pop-up window appears.
5. Enter information in the applicable fields. Refer to [Table 13–2](#) for field value descriptions.
6. Choose .

*Yantra 7x WMS supplies a list of standard device type, sub type and individual devices that is supported. The definition of a new device type, sub type and resultant device requires the creation of the appropriate attributes that define the communication with the device.*

The list of attributes that control communication to a printer are:

- DropDirectory - The directory where the print files are 'dropped' by Yantra 7x Application Server. The Software Print Server keeps polling this directory to pick up print requests.  
When mentioning the directory structure you can use the full path name or replace the path name with a variable. For more information on including this variable see *Yantra 7x Platform Configuration Guide*.

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**Note:** The DropDirectory attribute will appear in the Yantra 7x Configurator only if the property `yfs.software.tcpip.sockets` defined in `yfs.properties` is set to 'N'.

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- PrinterAlias - The printer alias as configured in the Software printer setup.

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**Note:** While setting up a Printer device in Yantra 7x WMS, please ensure that the Printer Alias is exactly the same as specified in the Software printer set-up.

In instances where a network printer is used, please ensure that the Printer Alias on Yantra 7x WMS does NOT contain the prefix "\\". However, Software may require the printer to be defined by prefixing "\\".

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- PrinterServerHostName - The host name for the Software Print Server. While IP Address may be sufficient, the use of host name is recommended for ease of maintenance.
- PrintServerPort - The port on which Software Print Server listens for print requests. By default, the print server port for Software Print Server is 2723.



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**Note:** The PrinterServerHostName and PrintServerPort attributes will appear in the Yantra 7x Configurator only if the property `yfs.loftware.tcpip.sockets` defined in `yfs.properties` is set to 'Y'.

---

The list of attributes that control communication to a weighing scale are:

- ClassName
- PortId
- BaudRate
- DataBits
- StopBits
- Parity
- FlowIn
- FlowOut

For more information about creation of the appropriate attributes, see [Section 13.1.3.1.1, "Setting Up a Device Attribute"](#) on page 952.

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**Note:** The ClassName for the Mettler Toledo Weighing Scale is `com.yantra.ycp.ui.io.YCPToledoPSImpl`. For specifications pertaining to the other attributes, please refer the weighing scale user manual.



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### 13.1.3.3 Modifying a Device

Once a Device has been created, it can be modified.


To modify a device:

1. From the tree in the application rules side panel, choose System Administration > Devices. The Device Setup window appears.
2. In the Device Setup window, select the relevant Device Type and Device Sub Type whose Device is to be modified.

3. The list of Devices is displayed. Select the Device to be modified.
4. Choose . The Device pop-up window appears.
5. Enter information in the applicable fields. Refer to [Table 13–2](#) for field value descriptions.
6. Choose .

### 13.1.3.4 Deleting a Device

To delete a device:

1. From the tree in the application rules side panel, choose System Administration > Devices. The Device Setup window appears.
2. In the Device Setup window, select the relevant Device Type and Device Sub Type whose Device is to be deleted.
3. The list of Devices is displayed. Select the Device to be deleted.
4. Choose .

## 13.2 Defining Bar Codes

Bar codes are machine-readable symbols comprising black-and-white patterns of bars and stripes, or in some cases checkerboard-like grids. The different styles of bar codes are called symbologies. Code 39, UPC, ISBN and Code 128 are examples of different symbologies.

Bits of information are encoded within bar codes. This data is read by bar code scanners, and often used in conjunction with databases. Bar codes don't require human input. They can be read by automated machines, and are virtually error-free.

A UPC bar code is used in North America and Japan on retail items. EAN is used in Europe. ISBN bar codes are used for books. Code 39 is one of the most popular in areas of warehousing, for tracking purposes.

A bar code can be either single dimensional or 2 dimensional (2D). Parcel and truckload carriers use 2D symbologies like PDF417 code or MAXICODE, to represent a large amount of information.

Yantra 7x WMS supports all barcode symbologies through the use of RF scanners. The bar code data captured through the RF is compared to a data source in WMS for validation. This is achieved in Yantra 7x WMS through the use of a bar code type and translation definition.

Use Bar Codes for:

- [Defining Bar Code Types](#)
- [Defining Bar Code Translation](#)

### 13.2.1 Defining Bar Code Types

A bar code type is associated to a data field for validation and translation purposes. For example, a bar code type of Location is defined for locations.

A bar code type in Yantra 7x WMS has translation defined to data sources. These translations act as a validation for the data scanned or entered into the field.

For example, entry of 1-PR-A1-B1-L1 into the location field in a console or a RF, causes the translation and validations of data sources against the associated bar code type of Location. It results in the user being allowed to continue with the activity being performed or being informed of an invalid data entry.

Yantra 7x WMS provides a default set of Bar Code Types. They are:

- Item
- Shipping Container
- Shipping Carton
- Shipping Pallet
- Batch
- Inventory Container
- Inventory Case
- Inventory Pallet
- Location
- Location Barcode
- Item or Shipping Container
- Location or Inventory Container
- Shipping or Inventory Container
- Shipment

- Item or Inventory Case
- Item or Inventory Container
- Pack SKU Initiation and Pack Scan Initiation
- Pallet Build

Yantra 7x WMS allows the addition of new bar code types.

Use the Bar Code Types set-up to create and delete these custom Bar Code Types.

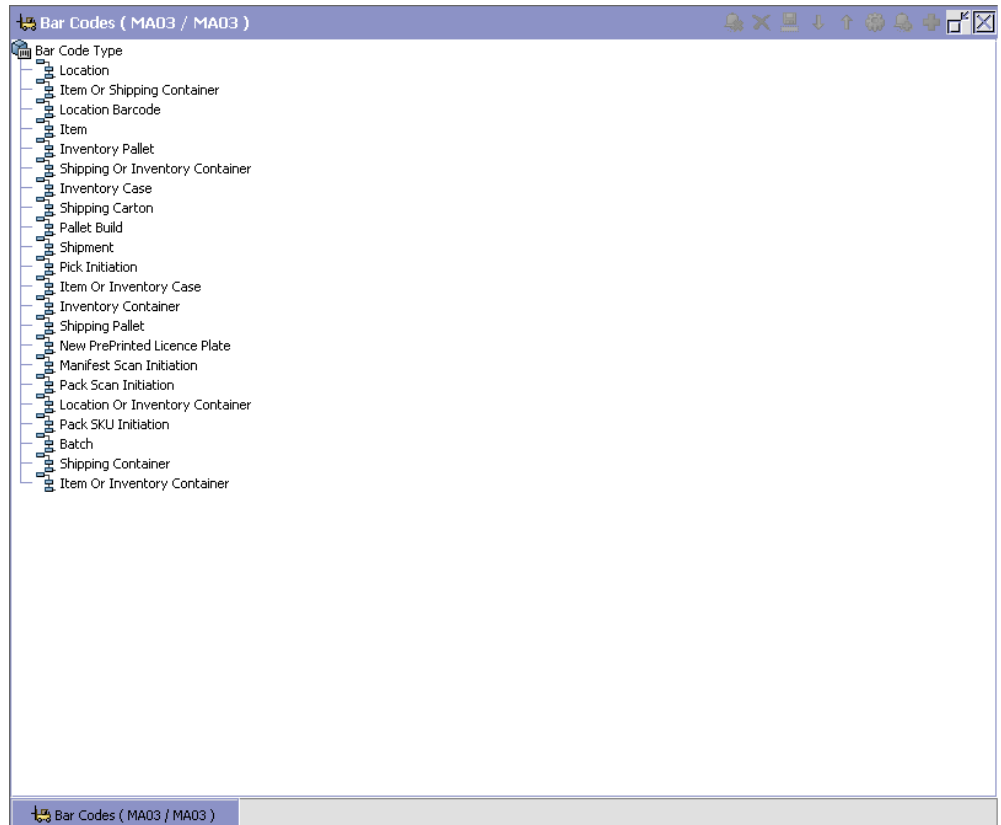
Use Bar Code Types for:



- [Creating a Bar Code Type](#)
- [Deleting a Bar Code Type](#)

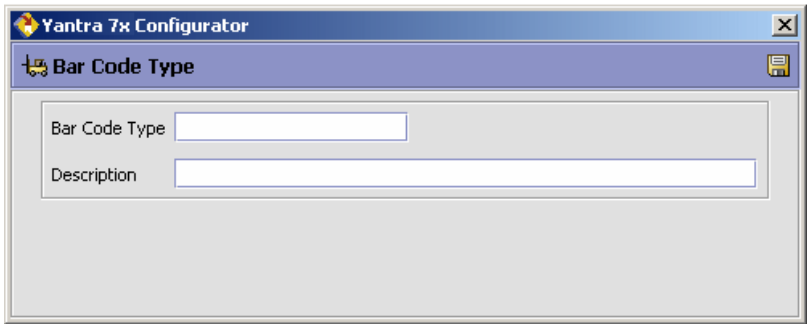
### 13.2.1.1 Creating a Bar Code Type

To create a bar code type:

1. From the tree in the application rules side panel, choose System Administration > Bar Codes. The Bar Codes window is displayed with the existing Bar Code Types.



2. In the Bar Codes window, choose . The Bar Code Type pop-up window appears.
3. Enter information in the applicable fields. Refer [Table 13–5](#) for field value descriptions.
4. Choose .




**Table 13–5 Bar Code Type Pop-up Window**

Field	Description
Bar Code Type	Enter the name of the bar code type. This identifies the data type of the field being scanned in the user interface.
Description	Enter a brief description for the bar code type.

The new bar code type is associated directly to the data field through a dictionary.

**13.2.1.2 Deleting a Bar Code Type**

To delete a bar code type:

1. From the tree in the application rules side panel, choose System Administration > Bar Codes. The Bar Codes window is displayed with the existing Bar Code Types.
2. In the Bar Codes window, choose the Bar Code Type to be deleted.
3. Choose .

Default bar code types provided by Yantra 7x WMS cannot be deleted.

**13.2.2 Defining Bar Code Translation**

Bar Code Translation defines how a bar code is validated.



In addition to the default bar code validation sources provided in Yantra 7x WMS, additional validations can be created using the Yantra 7x Service Definition Framework.

Use Bar Code Translations for:

- [Creating a New Bar Code Translation Association](#)
- [Creating a New Bar Code Translation Association from an Existing Bar Code Translation Association](#)
- [Modifying a Bar Code Translation Association](#)
- [Moving a Bar Code Translation Association](#)
- [Deleting a Bar Code Translation Association](#)

### 13.2.2.1 Creating a New Bar Code Translation Association

To create a new bar code translation association:

1. From the tree in the application rules side panel, choose System Administration > Bar Codes. The Bar Codes window is displayed with the existing Bar Code Types.
2. Choose the Bar Code Type for which you want to create a new Bar Code Translation.
3. Choose . The Bar Codes pop-up window appears.
4. Enter information in the applicable fields. Refer [Table 13–6](#) for field value descriptions.
5. Choose .

Yantra 7x Configurator

Bar Codes

Bar Code TypeLocation Barcode

Description

Translation Sequence

☐ Variable Length Code

Application Identifier

Fixed Length Bar Code Attributes

Code Length

Start Position

End Position

Bar Code Validation Source

Alias Type

Validation Service

Table 13–6 Bar Codes Pop-up Window

Field	Description
Bar Code Type	<p>The bar code type is populated automatically based on the bar code type selected.</p> <p><b>Note:</b> For a bar code translation to be successful for Barcode Type 'Item' and Barcode Translation Source 'UPCCaseCode', the packaging indicator for UOM 'Case' should be defined.</p> <p>In addition, an alias 'UPCCCode' should be defined, and a value for this alias should be provided in 'Other Attributes' tab in 'Item Details' screen.</p>
Description	<p>Enter a description for the bar code translation being created.</p>



**Table 13–6 Bar Codes Pop-up Window**

Field	Description
Translation Sequence	<p>Enter a translation sequence number for the bar code translation.</p> <p>Translation sequence defines the sequence of translations of a bar code for a given bar code type.</p> <p>For example, a bar code data type 'Item ID' has Item, UPC, and UPC Case Code defined as translations, with sequence numbers 2, 3, and 1 respectively. The translation sequence now is to first validate against UPC Case Code, Item, and finally UPC.</p>
Variable Length Code	<p>Select if the bar code length is not fixed</p> <p>This indicates that the bar code length is fixed or not fixed. For example, while scanning an item bar code, the item ID could be of different lengths.</p>
Application Identifier	<p>Enter the application identifier.</p> <p>Application identifier is an alphanumeric string used to identify the data source. For example, in EIA compliance scanning for a pallet and carton labels, a prefix of K indicates a purchase order, P indicates an item, and Q indicates the quantity.</p> <p>The remainder of the bar code is used to validation against the source specified.</p>
<b>Fixed Length Bar Code Attributes</b>	
Code Length	<p>Enter the length of the bar code.</p> <p>Code length is the length of the entire stream scanned. The code length is used to identify the bar code when validating the scanned data. This is not applicable when the bar code is of variable length.</p>
Start Position	<p>Enter the start position of the bar code.</p> <p>This is not applicable when the bar code is of variable length. In the case when an application identifier is specified the start position is against the remainder of the bar code. For example, K1234 where K is the application identifier the value of the start position for 1234 is 1.</p>

Table 13–6 Bar Codes Pop-up Window

Field	Description
End Position	<p>Enter the end position of the bar code.</p> <p>This defines the section of the bar code to be validated. For example, in symbologies that have check digits used the end position could be the last but one position.</p>
Bar Code Validation Source	<p>Choose the validation source for the bar code.</p> <p>Bar code validation source represents the data to be validated against. For example, a bar code representing a UPC Case code for an item will have a data source of UPC Case Code. A location bar code being scanned will have location id as its data source or a distinct location bar code.</p> <p>The list of values although extensive also provides for additional sources to be added through the use of 'External Source' data source. The externally translated source is implemented using the Yantra 7x Service Definition Framework.</p>
Alias Type	<p>Choose the alias type for the bar code.</p> <p>This applies when the validation source is 'ItemAlias'. A list of defined item alias is displayed here from the catalog. An example is UPC Code.</p>
Validation Service	<p>Choose the validation service for external validation of the barcode.</p> <p>This applies when validation source of 'External Source' is chosen. A list of service flows defined in Yantra 7x Service Definition Framework are displayed.</p> <p><b>Note:</b> This service needs to support the same input and output XML structure as the <code>translateBarCode</code> API. For more information, see the <i>Yantra 7x Javadocs</i>.</p>



**Note:** For a bar code translation to be successful when 'UPCCaseCode' is selected as a validation source, an alias type called 'UPCCode' should exist in the corresponding catalog organizations of all enterprises participating with the node.

When validation source is 'Item,' the translation verifies if the item is allowed to transact against (status being 'published'). For more information on item status, refer to *Yantra 7x Product Management Configuration Guide*.

For container SCM, the UCC128 validation source checks compliance against the industry standards.

### 13.2.2.2 Creating a New Bar Code Translation Association from an Existing Bar Code Translation Association



To create a new bar code translation association from an existing bar code translation association:


1. From the tree in the application rules side panel, choose System Administration > Bar Codes. The Bar Codes window is displayed with the existing Bar Code Types.
2. Choose the Bar Code Type you want to modify.
3. The list of Bar Code Translations belonging to the Bar Code Type selected is displayed.
4. Choose the Bar Code Translation to be copied. Choose .
5. The Bar Code Translations pop-up window appears.
6. Enter information in the applicable fields. Refer [Table 13–6](#) for field value descriptions.
7. Choose .

### 13.2.2.3 Modifying a Bar Code Translation Association

Once a Bar Code Translation Association has been created, it can be modified.

To modify a bar code translation association:



1. From the tree in the application rules side panel, choose System Administration > Bar Codes. The Bar Codes window is displayed with the existing Bar Code Types.
2. Choose the Bar Code Type you want to modify.
3. The list of Bar Code Translations belonging to the Bar Code Type selected is displayed.
4. Choose the Bar Code Translation to be modified. Choose .
5. The Bar Code Translations pop-up window appears.
6. Enter information in the applicable fields. Refer [Table 13–6](#) for field value descriptions.
7. Choose .

It is recommended that you use the "Save As"  feature to recreate new translations from Yantra 7x WMS supplied translations, and modify these translations.

### 13.2.2.4 Moving a Bar Code Translation Association

A Bar Code Translation Association can be moved up or moved down depending on the requirements.

To move a bar code translation association:


1. From the tree in the application rules side panel, choose System Administration > Bar Codes. The Bar Codes window is displayed with the existing Bar Code Types.
2. Choose the Bar Code Type you want to modify.
3. The list of Bar Code Translations belonging to the Bar Code Type selected is displayed.
4. Choose the Bar Code Translation to be moved.
5. Choose  to move the Bar Code Translation up.
6. Choose  to move the Bar Code Translation down.

The translation sequence of each translation sequence is exchanged, when it is moved up and down. The relevance of the sequence is to order the validations in the best hit list for a warehouse.

For example, warehouses using UPC Codes primarily. A few items have the bar code being the Item ID. The sequencing for better performance would have first UPC Code being validated and then Item ID being validated.

### 13.2.2.5 Deleting a Bar Code Translation Association

To delete a bar code translation association:

1. From the tree in the application rules side panel, choose System Administration > Bar Codes. The Bar Codes window is displayed with the existing Bar Code Types.
2. Choose the Bar Code Type you want to modify.
3. The list of Bar Code Translations belonging to the Bar Code Type selected is displayed.
4. Choose the Bar Code Translation to be deleted.
5. Choose .

It is recommended that you do not delete the Yantra 7x WMS supplied translations. The translations may instead be moved to the end of the translation sequence.

## 13.3 Defining Prints

The operation of a warehouse requires numerous documents, be it labels or reports, to be printed daily. The printing of the documents is either initiated by the occurrence of specific events or is requested ad-hoc by a user.

For example, carrier labels being printed at a manifest station after carton is scanned or a truck manifest (MBOL) being requested when a trailer loading is complete and truck is ready to close.

Documents are printed either individually or in a set or group. A document set consists of multiple documents that are related to individual activity that is performed.

For example, the release of a wave triggers print of wave summary report, carton content labels, batch sheets, and packing slips.

Examples of documents printed in a warehouse include packing lists, BOL, carrier labels, SKU labels, and UCC128 SCM labels.

Yantra 7x WMS provides standard documents that include:

- Batch Sheet for picking
- Cart Manifest for picking
- Packing Slip
- VICS Bill Of Lading (BOL)
- UCC-128 compliant 4x6 Shipping Labels including WALMART® compliance
- UPS Standard carrier labels
- Wave release prints document set consisting of one or more of the above prints

Yantra 7x WMS provides standard documents that include:

A specific document has a label format and printer sub type associated to it.

The association of a print document to the printer sub type (for example, packing slips on HP LaserJet printers) is done through Setting up a Printer Sub Type. For more information about setting up a Printer Sub Type, see [Section 13.1.2, "Defining a Device Sub Type"](#) on page 945.

The association of a specific printer to an equipment is done through Associate Devices to Equipment ID. For more information about associating a device with equipment, see [Section 3.10.5, "Setting Up an Equipment Device Association"](#) on page 93.

The association of a specific printer to a station is done through Associate Devices to Station ID. For more information about associating a device with station, see [Section 3.11.5, "Setting Up a Station Device Association"](#) on page 106.

The association of a document to a label format and name is done here.

Use Prints for:

- [Defining Print Documents](#)
- [Defining Label Formats](#)
- [Defining User Printer Preferences](#)
- [Defining Participant Print Preferences](#)

### 13.3.1 Defining Print Documents

A document is assigned a name and a corresponding label format here. Yantra 7x WMS provides standard list of documents for the prints supported.

For example, VICS BOL is associated with the VICS BOL label format.


Print documents and label formats created are at the HUB level.

Use Print Documents set-up for:

- [Creating a Print Document](#)
- [Modifying a Print Document](#)
- [Deleting a Print Document](#)

#### 13.3.1.1 Creating a Print Document

To create a print document:

1. From the tree in the application rules side panel, choose System Administration > Prints > Print Documents. The Print Documents window is displayed with Yantra 7x WMS default print documents.
2. Enter information in the applicable fields. Refer [Table 13–7](#) for field value descriptions.
3. Choose .

Print Documents ( DEFAULT )			
Print Document	Document Description	Save Directory	Default Label Format
PACKLIST	Packing Slip		PACKLIST
CONTAINER_LABEL	UCC-128 Container Shipping Label		CONTAINER_LABEL_MULTI_SKU
TASKLIST	TaskList		ITEM_PICK_BATCHSHEET
VICS_BOL	VICS Bill Of Lading		VICSBOL_SHIPMENT
UPS_PICKUP_SUMMARY	UPS Pickup Summary		UPS_PICKUP_SUMMARY
UPS_CARRIER_LABEL	UPS Carrier Label		UPS_CARRIER_LABEL
FEDX_CARRIER_LABEL	FEDEX Carrier Label		
COUNTSHEET	Count Sheet		COUNT_SHEET
*			
Results 8 Of 8			
Print Documents ( DEFAULT )			

Table 13–7 Print Documents Window

Field	Description
Print Document	Enter name of the document to be printed.
Document Description	Enter a brief description of the print document.




**Table 13–7 Print Documents Window**

Field	Description
Save Directory	Enter the directory path where the print document is saved.  This is used for documents that are pre-generated but printed on demand at a later time.  Typical example is a packing list that is pre-generated, but printed when last carton is scanned.
Default Label Format	Choose the default label format for printing.  This indicates the default label format for this document across all organizations. Label format is the name of the label design file (.LWL) created using Software Label Manager™.

### 13.3.1.2 Modifying a Print Document

Once a Print Document has been created, it can be modified.


To modify a print document:

1. From the tree in the application rules side panel, choose System Administration > Prints > Print Documents. The Print Documents window is displayed with a list of print documents.
2. Enter information in the applicable fields. Refer [Table 13–7](#) for field value descriptions.
3. Choose .

*It is recommended that the Yantra 7x WMS provided standard print documents are not modified.*

### 13.3.1.3 Deleting a Print Document

To delete a print document:

1. From the tree in the application rules side panel, choose System Administration > Prints > Print Documents. The Print Documents window is displayed with a list of print documents.
2. Choose the Print Document to be deleted.
3. Choose .

*It is recommended that the Yantra 7x WMS provided standard print documents are not deleted.*

### 13.3.2 Defining Label Formats

Label formats corresponding to the documents are defined here. This allows association of a Label format to the Software™ label format and the mapping XML file.

The Software™ label format associated here is created using Software™ tools. The mapping XML file is created using Yantra 7x WMS supplied toolkit. The field binding between the fields in the label and the field in the standard XML published are specified in the mapping XML.

Refer to *Yantra 7x Installation Guide* for further information on installing and configuring Software Label Manager™.

Yantra 7x WMS provides standard label formats and mapping files for all standard documents supported. A print is executed through a service flow defined in the Service Definition Framework (SDF). Yantra 7x WMS provides data flow for the standard documents provided.

To create, modify, or delete a Label Format, from the tree in the application rules side panel, choose System Administration > Prints > Label Formats. The Label Formats window is displayed with Yantra 7x WMS default label formats. For more information about defining label formats, refer to the *Yantra 7x Platform Configuration Guide*.

### 13.3.3 Defining User Printer Preferences

User Printer Preferences configures printers that are associated with a group of users or a specific user. This preference is used to determine the printer to use when a user prints a document.

For example, receiving office associates all its users to the HP LaserJet 5P located in the office.

The association of a printer to a station overrides the group preference of the specified user. The station is a static location where devices may be directly attached to a station.

It is recommended that User Printer Preferences be configured at the group level for easier administration.

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**Note:** Printer Preferences are configured using Yantra 7x Yantra 7x Platform application. For more information about configuring Yantra 7x Yantra 7x Platform, see *Yantra 7x Platform Configuration Guide*.

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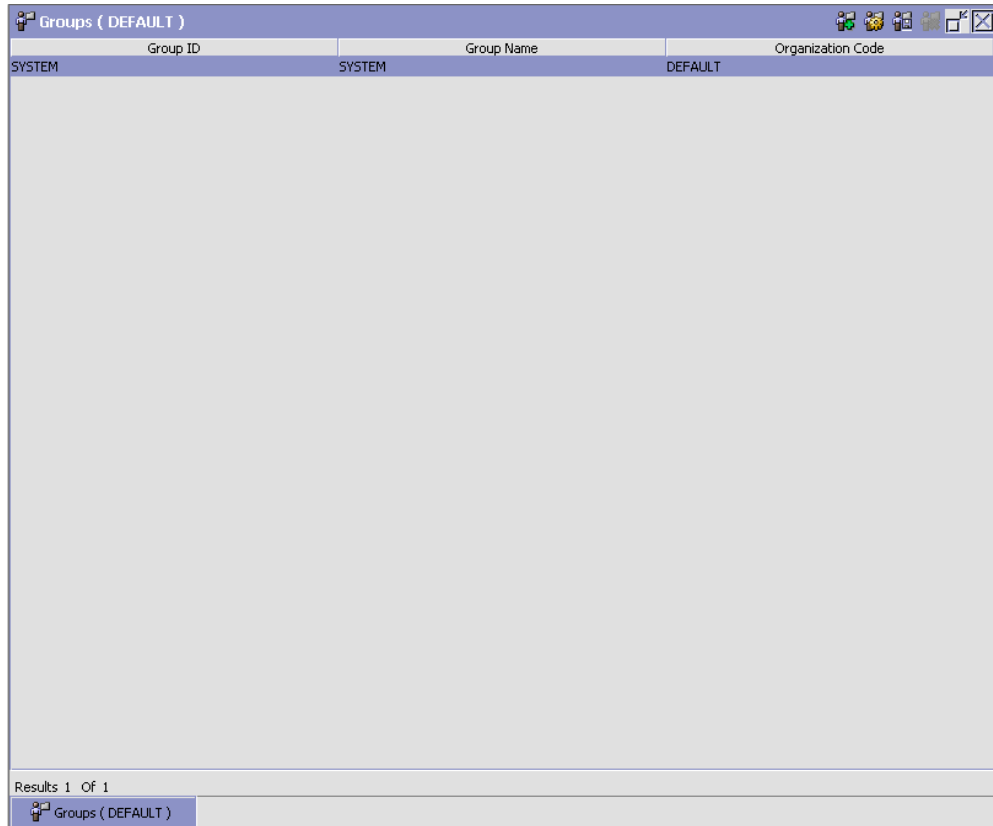
Use Printer Preferences for:



- [Setting Up Printer Preferences for a Group](#)
- [Setting Up Printer Preferences for a User](#)

### 13.3.3.1 Setting Up Printer Preferences for a Group

To set up printer preferences for a group:

1. From the menu bar, choose Applications > Platform. The Platform tree is displayed in the side panel.
2. From the tree in the application rules side panel, choose Security > Groups. The Groups window is displayed with a list of groups.



3. In the Groups window, choose the Group whose Printer Preferences are to be set up.
4. Choose . The Group Details window is displayed.
5. In the Group Details window, choose the Printer Preferences tab. The Printer Preferences tab window is displayed.
6. Enter the information in the applicable fields. Refer [Table 13–8](#) for field value descriptions.
7. Choose .

For more information about Setting Up a Group (Creating, Modifying, or Deleting a Group), see *Yantra 7x Platform Configuration Guide*.

The screenshot shows a software window titled "Group Details ( DEFAULT )". It has four tabs: "Primary Info", "Permissions", "User Subscriptions", and "Printer Preferences". The "Printer Preferences" tab is active, showing a section titled "Printer Association". Below this title is a table with one header row labeled "Printer ID" and one data row containing an asterisk (\*). The status bar at the bottom of the window displays "Results 0 Of 0".

**Table 13–8 Printer Preferences Tab Window**


Field	Description
<b>Printer Association</b>	
Printer ID	Choose the printer ID to be associated with the group.

*The printer at the packing station is associated to the station and not to the packing group or the individual packer. This is also recommended for warehouses that have only a single pack station.*

### 13.3.3.2 Setting Up Printer Preferences for a User

**Note:** It is recommended that User Printer Preferences be configured at a group level for easier administration.

To set up printer preferences for a user:



1. From the menu bar, choose Applications > Platform. The Platform tree is displayed in the side panel.
2. From the tree in the application rules side panel, choose Security > Users. The User Search window is displayed.
3. In the User Search window, enter applicable search criteria.
4. Choose . The list of users is displayed in the Search Results panel of the User Search window.

For more information about Creating a New User, see *Yantra 7x Platform Configuration Guide*.

The screenshot shows a software window titled "User Search ( DEFAULT )". It contains several input fields and controls:

- User ID:** A dropdown menu and a text input field.
- User Name:** A dropdown menu and a text input field.
- User Group:** A dropdown menu.
- Queue:** A dropdown menu with a printer icon.
- Status:** Three radio buttons labeled "Active", "Inactive", and "Either".
- Max Records:** A text input field containing "1,000".

Below the search criteria is a "Search Results" panel. It displays a table with two columns: "User ID" and "User Name". The first row of results shows "yantra" under User ID and "Administrator" under User Name. At the bottom of the results panel, it says "Results 1 Of 1".

5. In the Search Results panel of the User Search window, choose the User whose Printer Preferences are to be set up.
6. Choose . The User Details window is displayed.
7. In the User Details window, choose the Printer Preferences tab. The Printer Preferences tab window is displayed.
8. Enter the information in the applicable fields. Refer [Table 13–9](#) for field value descriptions.
9. Choose .

For more information about Setting Up a User (Creating, Modifying, or Deleting a User), see *Yantra 7x Platform Configuration Guide*.

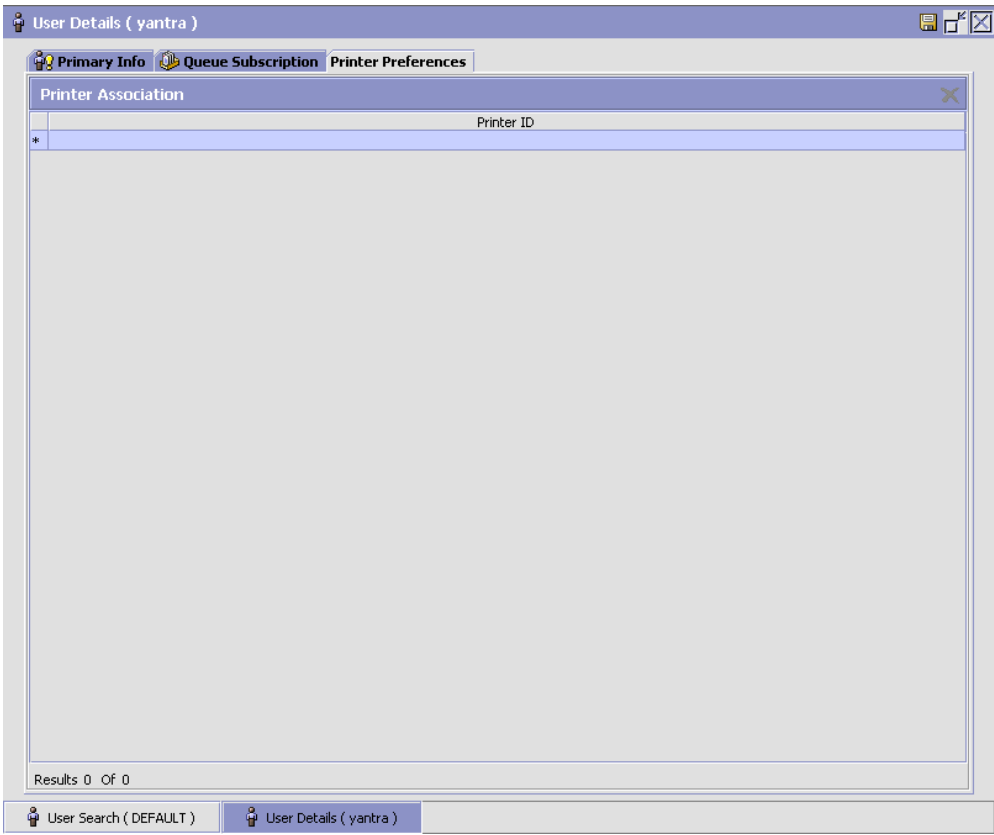


Table 13–9 Printer Preferences Tab Window

Field	Description
Printer Association	
Printer ID	Choose the printer ID to be associated with the user.

### 13.3.4 Defining Participant Print Preferences

Participant Print Preferences configures the list of devices that are printers at a participant level. This limits the printers being eligible for documents for the participant organization.



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**Note:** Participant Print Preferences are configured using Yantra 7x Yantra 7x Platform application. For more information about configuring Yantra 7x Yantra 7x Platform, see *Yantra 7x Platform Configuration Guide*.

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A participant is associated with a role. For example, the ship node, enterprise, buyer, sellers, carriers are participants in the warehouse. A participant can also be associated with multiple roles. For example, a manufacturer who is both a seller and buyer.


The preferences specified in this document are generic for all participants in the warehouse.

Use Participant Print Preferences for:

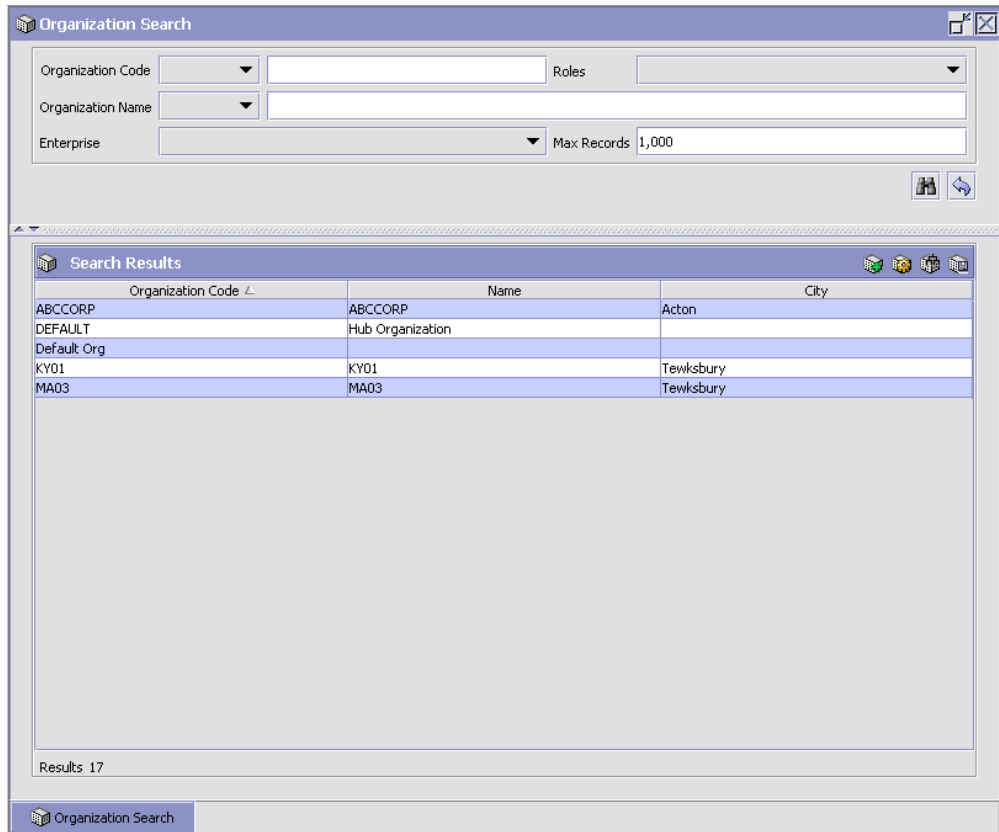
- [Setting Up Print Format Preferences](#)


#### 13.3.4.1 Setting Up Print Format Preferences


To set up print format preferences for a participant:

1. From the menu bar, choose Applications > Platform. The Platform tree is displayed in the side panel.
2. From the tree in the application rules side panel, choose Participant Modeling > Participant Setup. The Organization Search window is displayed.
3. In the Organization Search window, enter applicable search criteria.
4. Choose . The list of organizations is displayed in the Search Results panel of the Organization Search window.

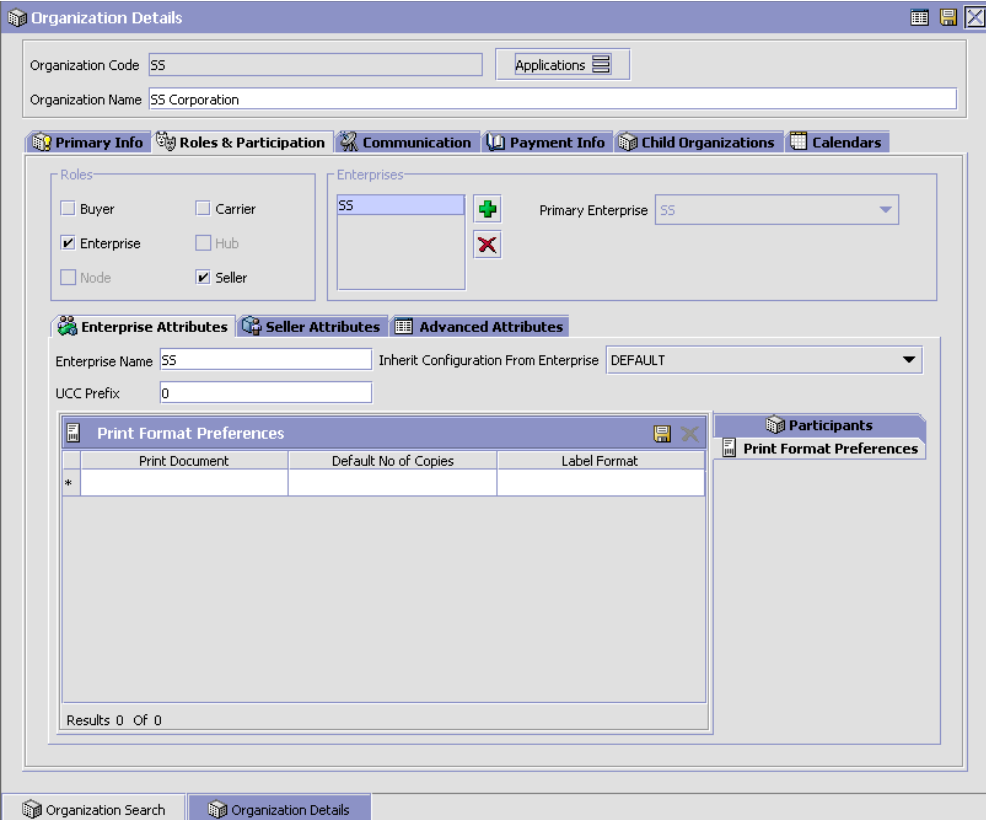
For more information about Creating a New Organization, see *Yantra 7x Platform Configuration Guide*.




5. In the Search Results panel of the Organization Search window, choose the Organization whose Printer Preferences are to be set up.
6. Choose . The Organization Details window is displayed.
7. In the Organization Details window, choose the Roles & Participation tab. The Roles & Participation tab window is displayed.
8. In the Roles & Participation tab window, choose the Print Format Preferences tab.
9. The Print Format Preferences list is displayed in the Node Attributes tab.

10. Enter the information in the applicable fields. Refer [Table 13–10](#) for field value descriptions.
11. Choose .

For more information about Setting Up an Organization (Creating, Modifying, or Deleting an Organization), see *Yantra 7x Platform Configuration Guide*.



**Organization Details**

Organization Code:  Applications 

Organization Name:

**Primary Info** **Roles & Participation** **Communication** **Payment Info** **Child Organizations** **Calendars**



**Roles**

☐ Buyer ☐ Carrier

☒ Enterprise ☐ Hub

☐ Node ☒ Seller

**Enterprises**

  Primary Enterprise:

**Enterprise Attributes** **Seller Attributes** **Advanced Attributes**

Enterprise Name:  Inherit Configuration From Enterprise:

UCC Prefix:

**Print Format Preferences**

	Print Document	Default No of Copies	Label Format
*			

Results 0 Of 0

**Participants**

**Print Format Preferences**

Organization Search Organization Details

**Table 13–10 Node Attributes Tab**

Field	Description
<b>Print Format Preference</b>	
Print Document	Choose the name of the document to be printed. For more information about creating a print document, see <a href="#">Section 13.3.1.1, "Creating a Print Document"</a> on page 969.
Default No. of Copies	Enter the number of copies to be printed as default.
Label Format	Choose the label format to be used. Label format is the name of the .lwl (Label Design) file created using Loftware Label Manager™. For more information about label formats, see <a href="#">Section 13.3.2, "Defining Label Formats"</a> on page 952.

*Yantra 7x WMS supplies a list of default documents. These documents are pre-configured to consider specific participant(s) when determining the appropriate printer and its attributes.*

*For example,*

- *Carton and Pallet shipping label print considers buyer at the ship node.*
- *Cart Manifest batch sheet considers the type of batch (sort while pick, pick and sort) along with the type of equipment used.*
- *Packing list/slip considers the enterprise, seller and buyer organization at the ship node.*
- *Bill of Lading considers the carrier (SCAC).*
- *Manifest print considers the carrier (SCAC).*

## Time-Triggered Transaction Reference

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Yantra 7x WMS provides a collection of time-triggered transactions, which are utilities that perform a variety of individual functions, automatically and at specific time intervals.

Time-triggered transactions perform repetitive actions on a scheduled basis, typically performing database updates, raising events, or calling APIs. In one type of transaction, monitors are designed to watch for processes or circumstances that are out of bounds and then raise alerts. Often, but not always, they retrieve tasks from the task queue or work off the pipeline.

Some transactions enable you to collect statistical data regarding the application's health. This data is collected periodically, using the value specified for the `yantra.statistics.persist.interval` attribute in the `yfs.properties` file. By default, statistics collection set to "on."

For more information about statistics persistence, see the *Yantra 7x Performance Management Guide*. For more information about the specific statistics parameters used, see the applicable time-triggered transactions.

The time-triggered transactions described in this appendix are unique transactions, that may or may not be document type specific. For document specific transactions, the nomenclature helps define which unique transaction it is based on: a transaction ID will be in the format `Unique_Transaction_ID.Document_Type_Code`. For example, the transaction ID for Purge Return is `PURGE.0003`, indicating that it is based on the unique transaction `PURGE`, for document type `0003`, which is Return Order. Therefore, in order to be able to configure Purge Return, you should look for the `PURGE` transaction ID in this appendix, which is Order Purge.

Yantra 7x provides the following types of time-triggered transactions:

- [Business Process Time-Triggered Transactions](#) - responsible for processing
- [Purge Time-Triggered Transactions](#) - clear out data that may be discarded after having been processed

### A.1 Running Time-Triggered Transactions

All time-triggered transactions can run on multiple threads. This means that you can run multiple instances of a transaction within a single process. For information on running time-triggered transactions, see the *Yantra 7x Installation Guide*. For information on fine-tuning system performance while running them concurrently, see the *Yantra 7x Performance Management Guide*.

### A.2 Business Process Time-Triggered Transactions

This section provides an alphabetical list of all business process transactions.

The business process time-triggered transactions are:

- [Accept Wave](#)
- [Allocate Task](#)
- [Assign Lane](#)
- [Auto Accept Variance](#)
- [Containerize Wave](#)
- [Create Batch](#)
- [Create Count Task](#)
- [Create Third Count Task](#)
- [Create Variance Task](#)
- [Create Wave](#)
- [Create Wave For a Shipment Group](#)

- [Execute Count-Program](#)
- [Location Inventory Monitor](#)
- [Mine Productivity](#)
- [Print Wave](#)
- [Release Wave](#)
- [Reopen Task](#)
- [Request Batch Completion](#)
- [Cancel Wave](#)
- [Cancel Move](#)
- [Re-Calculate Location Dimensions](#)

### A.2.1 Accept Wave

This time-triggered transaction is used to accept waves. If this transaction is called for a node, all of the shipment groups belonging to the node are processed.

#### Attributes

The following are the attributes for this time-triggered transaction:

**Table A–1 Accept Wave Attributes**

Attribute	Value
Transaction Name	Accept Wave
Transaction ID	ACCEPT_WAVE.4001
Base Process Type	Outbound Picking
Base Document Type	Outbound Picking
Abstract Transaction	No
APIs Called	None
User Exits Called	None

#### Criteria Parameters

The following are the criteria parameters for this transaction:

**Table A–2 Accept Wave Criteria Parameters**

Parameter	Description
Action	Required. Triggers the transaction. If left blank, it defaults to Get, the only valid value.
Number of Records To Buffer	Optional. Number of records to retrieve and process at one time. If left blank or specified as 0 (zero), it defaults to 5000.
Node	Required. The warehouse management ship node for which records are being processed.
ShipmentGroupId	Optional. If passed, waves are accepted only for the specified 'ShipmentGroupId'.
AgentCriteriaGroup	Optional. Used to classify nodes. This value can be accepted by WMS time-triggered transactions that will only perform their tasks on the nodes with a matching node transactional velocity value.  Valid values are: LOW, HIGH, and any additional values defined by the Hub from Platform > System Administration > Agent Criteria Groups.

### Statistics Tracked

The following statistics are tracked for this transaction:

**Table A–3 Accept Wave Statistics**

Statistic Name	Description
NumWavesAccepted	Number of waves accepted.

### Pending Job Count

For this transaction the pending job count is the number of records available to be processed by the transaction with the AVAILABLE\_DATE value less than or equal to ( $\leq$ ) the current date value in the YFS\_Task\_Q table.

### Events Raised

The following events are raised by this time-triggered transaction:



*Table A–4 Events Raised by the Accept Wave Transaction*

Transaction/Event	Key Data	Data Published	Template Support?
ON_SUCCESS	wave_dbd.txt	WMS_ACCEPT_WAVE.ON_SUCCESS.xml	Yes

## A.2.2 Allocate Task

To create tasks as Draft, set the flag "Delayed Inventory Allocation Support" at the node level to "Y". This flag is found in the "Wave Release Schedule" for pick planning.

Yantra 7x provides the draft status support for outbound picking, retrieval, and putaway tasks. When tasks are created in large numbers as a part of wave or move request release, locks are held for longer durations (for creating all tasks). In such situations, Yantra recommends that you enable the draft status support to allocate tasks in a multi-threaded fashion by the Allocate Task agent. This reduces the lock holding time.

### Attributes

The following are the attributes for this time-triggered transaction:

*Table A–5 Allocate Task Attributes*

Attribute	Value
Transaction Name	Allocate Task
Transaction ID	ALLOCATE_TASK
Base Process Type	Task Execution
Base Document Type	Task Execution
Abstract Transaction	No
APIs Called	None
User Exits Called	None

## Criteria Parameters

### Note:

- When configuring criteria, ensure that there are at least two threads configured for each criteria.
- Yantra recommends that you have some threads of this agent in the same agent server as the one running the ReleaseWave agent. This is to prevent the wave release from waiting for tasks to be allocated by another agent server resulting in redundancy in the same agent server.
- Configure the Allocate Task agent to automatically get triggered every 5 or 10 minutes.

The following are the criteria parameters for this transaction:

**Table A–6 Allocate Task Criteria Parameters**

Parameter	Description
Action	Required. Triggers the transaction. If left blank, it defaults to Get, the only valid value.
Number of Records To Buffer	Optional. Number of records to retrieve and process at one time. If left blank or specified as 0 (zero), it defaults to 5000.

## Events Raised

The following events are raised by this time-triggered transaction:

**Table A–7 Events Raised by the Allocate Task Transaction**

Transaction/Event	Key Data	Data Published	Template Support?
ALLOCATE_TASK / CHILD_ALLOCATION_COMPLETE	task_dbd.txt	ALLOCATE_TASK.ON_CHILD_ALLOCATION_COMPLETE.xml	Yes

**Note:** The `ALLOCATE_TASK.ON_CHILD_ALLOCATION_COMPLETE` event publishes information of the summary task for which allocation of all child tasks is complete. Use this event to print batch sheets or task lists for picking against move requests. Otherwise, if you do not use the draft status feature, the batch sheets or task lists would be printed on the `RELEASE_MOVE_REQUEST.ON_SUCCESS` event.

Define a custom service which does the following:

1. Calls the `getTaskDetails` API.
2. Using an XSL, prepares input to `getMoveRequestDetails` API by extracting `MoveRequestKey` from the `TaskReferences` node.
3. Calls the `getMoveRequestDetails` API and connect the output to the `PrintMoveTickets` service (provided out-of-the-box).

### A.2.3 Assign Lane

This Task Q based time-triggered transaction is used to assign lanes. This time-triggered transaction should be used in scenarios where we need to balance the load on the lanes by distributing the shipments across the various lanes that are available for use.

The Assign Lane time-triggered transaction works off a Wave, and assigns lanes to all shipments in the Wave that have not yet been assigned a lane. Depending on the configuration, it will assign lanes based on `SortByShipment` and `SortByCarrier`.

If any dedicated lanes have been configured, then this time-triggered transaction will assign the dedicated lanes to the shipments that satisfy the criteria configured for the dedicated locations. After assigning the dedicated lanes, if there are still shipments which do not have any lanes assigned, then these shipments will be assigned to any non-dedicated locations in a round-robin fashion.

## Attributes

The following are the attributes for this time-triggered transaction:

**Table A–8 Assign Lane Attributes**

Attribute	Value
Transaction Name	Assign Lanes
Transaction ID	ASSIGN_LANE.4001
Base Process Type	Outbound Picking
Base Document Type	Outbound Picking
Abstract Transaction	No
APIs Called	None
User Exits Called	com.yantra.wms.japi.ue.WMSOverrideAssignLaneUE

## Criteria Parameters

The following are the criteria parameters for this transaction:

**Table A–9 Assign Lane Criteria Parameters**

Parameter	Description
Action	Required. Triggers the transaction. If left blank, it defaults to Get, the only valid value.
Number of Records To Buffer	Optional. Number of records to retrieve and process at one time. If left blank or specified as 0 (zero), it defaults to 5000.
Next Task Queue Interval	Optional. Specifies in hours how long a failed task should be suspended before it is considered for reprocessing. Defaults to 5 hours.

**Table A–9 Assign Lane Criteria Parameters**

Parameter	Description
Node	Required. The warehouse management ship node for which records are being processed.
AgentCriteriaGroup	Optional. Used to classify nodes. This value can be accepted by WMS time-triggered transactions that will only perform their tasks on the nodes with a matching node transactional velocity value.  Valid values are: LOW, HIGH, and any additional values defined by the Hub from Platform > System Administration > Agent Criteria Groups.

### Statistics Tracked

The following statistics are tracked for this transaction:

**Table A–10 Assign Lane Statistics**

Statistic Name	Description
NumShipments	Number of shipments for which lanes have been assigned.

### Pending Job Count

For this transaction the pending job count is the number of records available to be processed by the transaction with the AVAILABLE\_DATE value less than or equal to ( $\leq$ ) the current date value in the YFS\_Task\_Q table.

### Events Raised

The following events are raised by this time-triggered transaction:

**Table A–11 Events Raised by the Assign Lane Transaction**

Transaction/Event	Key Data	Data Published	Template Support?
ON_SUCCESS	wave_dbd.txt	WMS_ASSIGN_LANE.ON_SUCCESS.xml	Yes
HAS_EXCEPTIONS		WMS_ASSIGN_LANE.HAS_EXCEPTIONS.xml	Yes

### A.2.4 Auto Accept Variance

Auto Accept Variance is a time-triggered transaction that is called to automatically accept variance obtained from the results of a count request. This transaction runs off Task Q. The Task Q uses CountRequestKey as Data key. Once CountRequestKey is obtained, the transaction resolves the variances for this count request.

Depending on the Variance Quantity, inventory is either increased or decreased in the system to match up with physical inventory. Audits are written for the inventory adjustments performed during auto acceptance of variance.

#### Attributes

The following are the attributes for this time-triggered transaction:

**Table A–12 Auto Accept Variance Attributes**

Attribute	Value
Base Transaction ID	AUTO_ACCEPT_VARIANCE
Base Document Type	Count
Base Process Type	Count Execution
Abstract Transaction	No
APIs Called	None
User Exits Called	None

## Criteria Parameters

The following are the criteria parameters for this transaction:

**Table A–13 Auto Accept Variance Parameters**

Parameter	Description
Action	Required. Triggers the transaction. If left blank, it defaults to Get, the only valid value.
Number of Records To Buffer	Optional. Number of records to retrieve and process at one time. If left blank or specified as 0 (zero), it defaults to 5000.
Node	Optional. Node for which the Auto Accept Variance needs to be run. If not passed, then all nodes are monitored.
ReasonCode	Optional. The reason code is mandatory for accepting variance and adjusting inventory. Reason codes will be associated to unique accounting bin location. When inventory adjustment happens in a location, corresponding bin adjustments will also happen.
ReasonText	Optional. The Reason Text is provided to give purpose the inventory is adjustment. Some of the reasons are like Theft/Damage etc. The system does not perform any validations for the reason text. Whatever the user provides is updated.

## Statistics Tracked

The following statistics are tracked for this transaction:

**Table A–14 Auto Accept Variance Statistics**

Statistic Name	Description
NumCountRequestsForWhichVarianceAccepted	Statistics for number of count requests for which variance has been accepted.

## Pending Job Count

For this transaction the pending job count is the number of records available to be processed by the transaction with the AVAILABLE\_DATE

value less than or equal to ( $\leq$ ) the current date value in the YFS\_Task\_Q table.

### Events Raised

The following events are raised by this time-triggered transaction:

**Table A–15 Events Raised by the Auto Accept Variance Transaction**

Transaction/Event	Key Data	Data Published	Template Support?
ON_SUCCESS	count_dbd.txt	WMS_AUTO_ACCEPT_VARIANCE.ON_SUCCESS.xml	Yes

## A.2.5 Containerize Wave

Containerize Wave is a time-triggered transaction which can be invoked to containerize a shipment, batch, or inventory pallet id.

This time-triggered transaction is used to generate the outbound containers used for packing, both for 'pack while pick' and 'pack after pick' processes. The Task Type and Pack Strategy settings define whether the packing is done during picking, or after picking.

### Attributes

The following are the attributes for this time-triggered transaction:

**Table A–16 Containerize Wave Attributes**

Attribute	Value
Transaction Name	Containerize Wave
Transaction ID	CONTAINERIZE_WAVE
Base Process Type	Outbound Picking
Base Document Type	Outbound Picking
Abstract Transaction	No



**Table A–16 Containerize Wave Attributes**

Attribute	Value
APIs Called	PostPickContainerization
User Exits Called	com.yantra.wms.japi.ue.WMSCircumventLooseContainerizationUE com.yantra.wms.japi.ue.WMSOverrideSuggestedContainerListUE

### Criteria Parameters

The following are the criteria parameters for this transaction:

**Table A–17 Containerize Wave Criteria Parameters**

Parameter	Description
Action	Required. Triggers the transaction. If left blank, it defaults to Get, the only valid value.
Number of Records To Buffer	Optional. Number of records to retrieve and process at one time. If left blank or specified as 0 (zero), it defaults to 5000.
Node	Required. The warehouse management ship node for which records are being processed.
Next Task Queue Interval	Optional. Specifies in hours how long a failed task should be suspended before it is considered for reprocessing. Defaults to 5 hours.
AgentCriteriaGroup	Optional. Used to classify nodes. This value can be accepted by WMS time-triggered transactions that will only perform their tasks on the nodes with a matching node transactional velocity value.  Valid values are: LOW, HIGH, and any additional values defined by the Hub from Platform > System Administration > Agent Criteria Groups.

### Statistics Tracked

The following statistics are tracked for this transaction:

**Table A–18 Containerize Wave Status Statistics**

Statistic Name	Description
NumWavesContainerized	Number of waves containerized.
NumContainersCreated	Number of containers created.

### Pending Job Count

For this transaction the pending job count is the number of records available to be processed by the transaction with the AVAILABLE\_DATE value less than or equal to ( $\leq$ ) the current date value in the YFS\_Task\_Q table.

### Events Raised

The following events are raised by this time-triggered transaction:

**Table A–19 Events Raised by the Containerize Wave Transaction**

Transaction/Event	Key Data	Data Published	Template Support?
ON_SUCCESS	wave_dbd.txt	WMS_ CONTAINERIZE_ WAVE.ON_ SUCCESS.xml	Yes

## A.2.6 Create Batch

Create Batch is a time-triggered transaction that creates batches for a given wave.

### Attributes

The following are the attributes for this time-triggered transaction:

**Table A–20 Create Batches Attributes**

Attribute	Value
Transaction Name	Create Batches
Transaction ID	BATCH_WAVE.4001
Base Document Type	Outbound Picking

**Table A–20 Create Batches Attributes**

Attribute	Value
Base Process Type	Outbound Picking
Abstract Transaction	No
APIs Called	None
User Exits Called	None

### Criteria Parameters

The following are the criteria parameters for this transaction:

**Table A–21 Create Batches Criteria Parameters**

Parameter	Description
Action	Required. Triggers the transaction. If left blank, it defaults to Get, the only valid value.
Number of Records To Buffer	Optional. Number of records to retrieve and process at one time. If left blank or specified as 0 (zero), it defaults to 5000.
Next Task Queue Interval	Optional. Specifies in hours how long a failed task should be suspended before it is considered for reprocessing. Defaults to 5 hours.
Node	Required. The warehouse management ship node for which records are being processed.
AgentCriteriaGroup	Optional. Used to classify nodes. This value can be accepted by WMS time-triggered transactions that will only perform their tasks on the nodes with a matching node transactional velocity value.  Valid values are: LOW, HIGH, and any additional values defined by the Hub from Platform > System Administration > Agent Criteria Groups.

### Statistics Tracked

The following statistics are tracked for this transaction:

**Table A–22 Create Batches Statistics**

Statistic Name	Description
NumberOfBatchesCreated	Number of batches created.
NumberOfTasksBatched	Number of tasks batched.

### Pending Job Count

For this transaction the pending job count is the number of records available to be processed by the transaction with the AVAILABLE\_DATE value less than or equal to ( $\leq$ ) the current date value in the YFS\_Task\_Q table.

### Events Raised

None.

## A.2.7 Create Count Task

Create Count Task is a time-triggered transaction that is called to create tasks for a given count request. Tasks are created based on the count request criteria. A summary task will be created for the count request criteria, and tasks will be created with summary task as parent task. The transaction runs off Task Q.

The count request attributes are used to determine the task type from the Count Strategy, by using the best match algorithm.

A count task will be created at a location level for the count request criteria. Additional attributes including specific item or pallet or case LPN may also be specified.

### Attributes

The following are the attributes for this time-triggered transaction:

**Table A–23 Create Count Task Attributes**

Attribute	Value
Transaction Name	Create Count Tasks
Transaction ID	CREATE_COUNT_TASKS
Base Document Type	Count

**Table A–23 Create Count Task Attributes**

Attribute	Value
Base Process Type	Count Execution
Abstract Transaction	No
APIs Called	<code>createCountRequest()</code>
User Exits Called	None

### Criteria Parameters

The following are the criteria parameters for this transaction:

**Table A–24 Create Count Task Criteria Parameters**

Parameter	Description
Action	Required. Triggers the transaction. If left blank, it defaults to Get, the only valid value.
Number of Records To Buffer	Optional. Number of records to retrieve and process at one time. If left blank or specified as 0 (zero), it defaults to 5000.
TaskGranularity	Required. Granularity for which the Create Count Task needs to be run.  The valid values are REQUEST or VARIANCE. Typically, this is set to REQUEST for first count, and VARIANCE for the successive counts.
TaskGenerationLevel	Required. Generation Level for which the Create Count Task needs to be run.  The valid values are ALL_LOCATIONS and LOCATIONS_WITH_VARIANCE. Typically, this is set to ALL_LOCATIONS for first count, and LOCATIONS_WITH_VARIANCE for successive counts.

**Note:** There are no separate Time-triggered Transactions for Create Third Count Task and Create Variance Task.

The Third Count Task and Variance Task is based on Create Count Task Time-Triggered Transaction.

Typically for a Third Count Task or Variance Task, the TaskGranularity is set to VARIANCE, while the TaskGenerationLevel is set to LOCATIONS\_WITH\_VARIANCE.

Statistics Tracked

The following statistics are tracked for this transaction:

Table A–25 Create Count Task Statistics

Statistic Name	Description
NumCountTasksCreated	Number of count tasks created.

Pending Job Count

For this transaction the pending job count is the number of records available to be processed by the transaction with the AVAILABLE\_DATE value less than or equal to (<=) the current date value in the YFS\_Task\_Q table.

Events Raised

The following events are raised by this time-triggered transaction:

*Table A–26 Events Raised by the Execute Count Program Transaction*

Transaction/Event	Key Data	Data Published	Template Support?
NO_REQUESTS_CREATED	count_dbd.txt	WMS_CREATE_COUNT_TASK.NO_REQUEST_CREATED.xml	Yes
ON_SUCCESS	count_dbd.txt	WMS_CREATE_COUNT_TASK.ON_SUCCESS.xml	Yes

### A.2.8 Create Third Count Task

There is no separate Time-triggered Transaction for Create Third Count Task. Create Third Count Task is based on Create Count Task Time-Triggered Transaction.

Typically for a Create Third Count Task, the TaskGranularity is set to VARIANCE, while the TaskGenerationLevel is set to LOCATIONS\_WITH\_VARIANCE.

For more information, see For more information, see [Section A.2.7, "Create Count Task"](#) on page 998.

### A.2.9 Create Variance Task

There is no separate Time-triggered Transaction for Create Variance Task, and Create Variance Task is based on Create Count Task Time-Triggered Transaction.

Typically for a Variance Task, the TaskGranularity is set to VARIANCE, while the TaskGenerationLevel is set to LOCATIONS\_WITH\_VARIANCE.

For more information, see [Section A.2.7, "Create Count Task"](#) on page 998.

### A.2.10 Create Wave

This time-triggered transaction is used to create waves. If this transaction is called for a node, all of the shipment groups belonging to the node are processed.

**Note:** The Create Wave Agent should be externally-triggered at pre-defined times, instead of setting it up as self-triggered.

Create Wave Agent works off a bunch of shipments that are sent to node and creates waves. This agent involves optimization logic. If set as self-triggered, it will create waves even when there are only a handful of shipments sent to node. This will either result in very small waves (if configured to automatically accept all the waves) or will result in the agent processing the same shipment repeatedly, and thus wasting machine resources (if configured not to automatically accept all the waves).

The `yfs.solver.iterations.wavecreate` property in the `yfs.properties` file is used to define the number of solver iterations for the Create Wave transaction. This setting is used to optimize the wave creation.

The default out-of-the-box shipped property in the `yfs.properties` file is:

```
yfs.solver.iterations.wavecreate = 1
```

A wave is created for a shipment group using the following logic:

- Shipments that are not assigned to a shipment group are identified.
- Shipments are assigned to the applicable shipment groups.
- Open waves (waves not yet 'Accepted') for the shipment groups assigned to the shipments are identified. Shipments belonging to these waves are also available to Create Wave time-triggered transaction.
- For each shipment group, process the available shipments applying the wave size constraints specified for the node as well as for the shipment group.
- Waves are created and the wave number stamped on the shipment lines.



**Note:** In the case of logical kits, the wave number is stamped on the kit components. Therefore, wave release logic only creates pick tasks for the components

### Attributes

The following are the attributes for this time-triggered transaction:

**Table A–27 Create Wave Attributes**

Attribute	Value
Transaction Name	Create Wave
Transaction ID	CREATE_WAVE.4001
Base Process Type	Outbound Picking
Base Document Type	Outbound Picking
Abstract Transaction	No
APIs Called	manageWave ( )
User Exits Called	com.yantra.wms.japi.ue.WMSBeforeCreateWaveUE com.yantra.wms.japi.ue.WMSOverrideShipmentGroupUE

### Criteria Parameters

The following are the criteria parameters for this transaction:

**Table A–28 Create Wave Criteria Parameters**

Parameter	Description
Action	Required. Triggers the transaction. If left blank, it defaults to Get, the only valid value.
Number of Records To Buffer	Optional. Number of records to retrieve and process at one time. If left blank or specified as 0 (zero), it defaults to 5000.
Node	Required. The warehouse management ship node for which records are being processed.

**Table A–28 Create Wave Criteria Parameters**

Parameter	Description
ShipmentGroupId	Optional. If passed, waves are created only for the specified 'ShipmentGroupId'.
AgentCriteriaGroup	Optional. Used to classify nodes. This value can be accepted by WMS time-triggered transactions that will only perform their tasks on the nodes with a matching node transactional velocity value.  Valid values are: LOW, HIGH, and any additional values defined by the Hub from Platform > System Administration > Agent Criteria Groups.

### Statistics Tracked

The following statistics are tracked for this transaction:

**Table A–29 Create Wave Statistics**

Parameter	Description
NumberOfWavesCreated	Number of waves created.
NumberOfWavesDeleted	Number of waves deleted. Waves that are in created status can be deleted and recreated if there are more shipments for that shipment group.
NumberOfShipmentLinesAssignedWaves	Number of shipment lines which have been included in the created waves.
NumberOfShipmentLinesReassignedWaves	Number of Shipment Lines which need to be reassigned to different waves.

### Pending Job Count

For this transaction the pending job count is the number of nodes for which waves have to be processed.

### Events Raised

This transaction raises events specified by the `manageWave()` API in the *Yantra 7x Javadocs*.

## A.2.11 Create Wave For a Shipment Group

This time-triggered transaction is used to create waves for a shipment group. This is similar to the Create Wave time-triggered transaction, except that this transaction is Task Q based and called for a specific Task Q Request.

### Attributes

The following are the attributes for this time-triggered transaction:

**Table A–30 Create Wave For a Shipment Group Attributes**

Attribute	Value
Transaction Name	Create Wave For a Shipment Group
Transaction ID	CREATE_WAVE_FOR_SHIPMENT_GROUP
Base Process Type	Outbound Picking
Base Document Type	Outbound Picking
Abstract Transaction	No
APIs Called	manageWave ( )
User Exits Called	com.yantra.wms.japi.ue.WMSBeforeCreateWaveUE com.yantra.wms.japi.ue.WMSOverrideShipmentGroupUE

### Criteria Parameters

The following are the criteria parameters for this transaction:

**Table A–31 Create Wave For a Shipment Group Criteria Parameters**

Parameter	Description
Action	Required. Triggers the transaction. If left blank, it defaults to Get, the only valid value.
Number of Records To Buffer	Optional. Number of records to retrieve and process at one time. If left blank or specified as 0 (zero), it defaults to 5000.

**Table A–31 Create Wave For a Shipment Group Criteria Parameters**

Parameter	Description
Next Task Q Interval	Optional. Specifies in hours how long a failed task should be suspended before it is considered for reprocessing. Defaults to 5 hours.
Node	Required. The warehouse management ship node for which records are being processed.
AgentCriteriaGroup	Optional. Used to classify nodes. This value can be accepted by WMS time-triggered transactions that will only perform their tasks on the nodes with a matching node transactional velocity value.  Valid values are: LOW, HIGH, and any additional values defined by the Hub from Platform > System Administration > Agent Criteria Groups.

### Statistics Tracked

The following statistics are tracked for this transaction:

**Table A–32 Create Wave For a Shipment Group Statistics**

Parameter	Description
NumberOfWavesCreated	Number of waves created.
NumberOfWavesDeleted	Number of waves deleted. Waves that are in created status can be deleted and recreated if there are more shipments for that shipment group.
NumberOfShipmentLinesAssignedWaves	Number of shipment lines assigned waves.
NumberOfShipmentLinesReassignedWaves	Number of shipment lines belonging to deleted waves.

### Pending Job Count

For this transaction the pending job count is the number of records available to be processed by the transaction with the AVAILABLE\_DATE value less than or equal to ( $\leq$ ) the current date value in the YFS\_Task\_Q table.

## Events Raised

This transaction raises events specified by the `manageWave()` API in the *Yantra 7x Javadocs*.

## A.2.12 Execute Count-Program

Execute Count-Program is a time-triggered transaction that is called to execute a given count request.

### Count Request Generation

#### Cycle count for classifications and performing count at item level

This time-triggered transaction uses the following logic (for each count program condition) to determine the number of count requests that need to be generated for items:

- The time-triggered transaction creates a list of all items that are applicable for the specified classifications. This is filtered to list only those items that satisfy one of the following two conditions:
  - a. The items have inventory, OR
  - b. The items belong to classifications whose count strategy indicates that these items should be put on count even if there is no inventory for them.
- The total number of count requests to be generated over the effective period of the count program is projected by multiplying the number of items (ascertained above) with the "times to count" value specified for the count program condition.
- The number of count requests needed to be generated on the day is calculated by dividing the total number of count requests (as calculated above) by the total number of working days left in the effective period of the count program.
- The time-triggered transaction now creates count requests for that many items from the above list of items. This list is sorted by the Item ID of each item. The time-triggered transaction then picks items from the list that are not counted in the current cycle.

For example, if you want to count 10 items in a three-day cycle, the first 3 items will be counted on the first day, the next 3 items on the second day and the remaining 4 items on the third day.

If you want to count only two items in a three-day cycle, the first item will be counted on the first day and the second item on the third day. This count strategy is followed to evenly distribute items that are counted in a cycle.

**Cycle count for classifications and performing count at classification level**

When a count program specifies that the count should be performed at the classification level, the count request and count tasks are generated for the classifications *per se*, and not for the items. Thus, the count requests are usually not generated daily, but after an interval of days.

While generating count requests, the time-triggered transaction uses the following logic (for each count program condition) to determine if the count request for the classification should be generated on that day:

- The time-triggered transaction verifies whether at least one item for the classification exists in the inventory. If no item is found in the inventory, the time-triggered transaction does not create any count requests for that day, unless the classifications’ count strategy indicates that the classification should be put on count even if there is no inventory for them.
- Where at least one item exists in the inventory, the interval between count request generation is projected by dividing the total number of working days left in the effective period of the count program by the number of times still to count (total to count - already counted).
- The time-triggered transaction then checks if the number of working days since the last generation is more than the **interval** calculated. If yes, it generates a count request for the classification.

**Attributes**

The following are the attributes for this time-triggered transaction:

**Table A–33    Execute Count-Program Attributes**

Attribute	Value
Transaction Name	Execute Count Program
Transaction ID	EXECUTE_COUNT_PROGRAM
Base Document Type	Count

**Table A–33** *Execute Count-Program Attributes*

Attribute	Value
Base Process Type	Count Execution
Abstract Transaction	No
APIs Called	None
User Exits Called	None

### Criteria Parameters

The following are the criteria parameters for this transaction:

**Table A–34** *Execute Count-Program Criteria Parameters*

Parameter	Description
Action	Required. Triggers the transaction. If left blank, it defaults to Get, the only valid value.
Number of Records To Buffer	Optional. Number of records to retrieve and process at one time. If left blank or specified as 0 (zero), it defaults to 5000.
AgentCriteriaGroup	Optional. Used to classify nodes. This value can be accepted by WMS time-triggered transactions that will only perform their tasks on the nodes with a matching node transactional velocity value.  Valid values are: LOW, HIGH, and any additional values defined by the Hub from Platform > System Administration > Agent Criteria Groups.
Node	Optional. Node for which the Execute Count Program needs to be run. If not passed, then all nodes are monitored.
CountProgramName	Optional. Count Program Name for which the Execute Count Program needs to be run. If not passed, then all count programs are monitored.

### Statistics Tracked

The following statistics are tracked for this transaction:

**Table A–35** *Execute Count-Program Statistics*

Statistic Name	Description
NumCountProgramsExecuted	Number of count programs executed.
NumCountRequestsCreated	Number of count requests created for the count program.

### Pending Job Count

For this transaction the pending job count is the number of count programs for the node, whose EFFECTIVE\_FROM\_DATE value less than or equal to ( $\leq$ ) and EFFECTIVE\_TO\_DATE value greater than or equal to ( $\geq$ ) the current date value.

### Events Raised

The following events are raised by this time-triggered transaction:

**Table A–36** *Events Raised by the Execute Count-Program Transaction*

Transaction/Event	Key Data	Data Published	Template Support?
NO_REQUESTS_CREATED	count_dbd.txt	WMS_EXECUTE_COUNT_PROGRAM.NO_REQUEST_CREATED.xml	Yes
ON_SUCCESS	count_dbd.txt	WMS_EXECUTE_COUNT_PROGRAM.ON_SUCCESS.xml	Yes

## A.2.13 Location Inventory Monitor

Location Inventory Monitor is the time-triggered transaction that monitors inventory in a location.

### Attributes

The following are the attributes for this time-triggered transaction:



**Table A–37 Location Inventory Monitor Attributes**

Attribute	Value
Base Transaction ID	LOCN_INV_MONITOR
Base Document Type	General
Base Process Type	WMS Inventory
Abstract Transaction	No
APIs Called	None
User Exits Called	None

### Criteria Parameters

The following are the criteria parameters for this transaction:

**Table A–38 Location Inventory Monitor Criteria Parameters**

Parameter	Description
Action	Required. Triggers the transaction. If left blank, it defaults to Get, the only valid value.
Number of Records To Buffer	Optional. Number of records to retrieve and process at one time. If left blank or specified as 0 (zero), it defaults to 5000.
RuleId	Optional. The Location Monitoring Rule ID for which the inventory monitor needs to be run.
Node	Optional. Node for which the Location Inventory Monitor needs to be run. If not passed, then all nodes are monitored.
AgentCriteriaGroup	Optional. Used to classify nodes. This value can be accepted by WMS time-triggered transactions that will only perform their tasks on the nodes with a matching node transactional velocity value.  Valid values are: LOW, HIGH, and any additional values defined by the Hub from Platform > System Administration > Agent Criteria Groups.

**Note:** While the criteria parameters Node and AgentCriteriaGroup are individually optional fields, both fields cannot be left blank and at least one of them has to be specified.

**Statistics Tracked**

None.

**Events Raised**

None.

**A.2.14 Mine Productivity**

This time-triggered transaction captures the productivity information for all the tasks done within the Yantra Task management framework. This information is extracted and consolidated per user. The time-triggered transaction runs at some scheduled intervals, for example as a end-of-day process.

Every individual task in Yantra 7x WMS captures its start and end time automatically. The time-triggered transaction checks all completed tasks, that have not been mined so far, collecting productivity metrics based on productivity references relevant for that productivity type. For more information about Productivity Types, see [Section 12.5, "Defining Productivity Types"](#) on page 901.

**Attributes**

The following are the attributes for this time-triggered transaction:

*Table A–39 Mine Productivity Attributes*

Attribute	Value
Base Transaction ID	MINE_PRODUCTIVITY
Base Document Type	General
Base Process Type	General
Abstract Transaction	No

**Table A–39 Mine Productivity Attributes**

Attribute	Value
APIs Called	None
User Exits Called	None

### Criteria Parameters

The following are the criteria parameters for this transaction:

**Table A–40 Mine Productivity Criteria Parameters**

Parameter	Description
Action	Required. Triggers the transaction. If left blank, it defaults to Get, the only valid value.
Number of Records To Buffer	Optional. Number of records to retrieve and process at one time. If left blank or specified as 0 (zero), it defaults to 5000.
Organization Code	Optional. Organization for which the Mine Productivity needs to be run. If not passed, then all organizations are monitored.
EnterpriseCode	Optional. Enterprise for which the Mine Productivity needs to be run. If not passed, then all enterprises are monitored.
ProductivityType	Optional. Productivity Type for which the Mine Productivity needs to be run. If not passed, then all productivity types are monitored.
UserId	Optional. User for whom the Mine Productivity needs to be run. If not passed, then all users are monitored.

### Statistics Tracked

The following statistics are tracked for this transaction:

**Table A–41 Mine Productivity Statistics**

Statistic Name	Description
NumTasksMined	Number of tasks mined.

**Pending Job Count**

For this transaction the pending job count is the number of tasks for which productivity is not stamped.

**Events Raised**

None.

**A.2.15 Print Wave**

This time-triggered transaction prints the wave.

**Attributes**

The following are the attributes for this time-triggered transaction:

**Table A–42** *Print Wave Attributes*

Attribute	Value
Transaction Name	Print Wave
Transaction ID	PRINT_WAVE.4001
Base Process Type	Outbound Picking
Base Document Type	Outbound Picking
Abstract Transaction	No
APIs Called	None
User Exits Called	None

**Criteria Parameters**

The following are the criteria parameters for this transaction:

**Table A–43** *Print Wave Criteria Parameters*

Parameter	Description
Action	Required. Triggers the transaction. If left blank, it defaults to Get, the only valid value.
Number of Records To Buffer	Optional. Number of records to retrieve and process at one time. If left blank or specified as 0 (zero), it defaults to 5000.

**Table A–43 Print Wave Criteria Parameters**

Parameter	Description
Next Task Queue Interval	Optional. Specifies in hours how long a failed task should be suspended before it is considered for reprocessing. Defaults to 5 hours.
Node	Required. The warehouse management ship node for which records are being processed.
AgentCriteriaGroup	Optional. Used to classify nodes. This value can be accepted by WMS time-triggered transactions that will only perform their tasks on the nodes with a matching node transactional velocity value.  Valid values are: LOW, HIGH, and any additional values defined by the Hub from Platform > System Administration > Agent Criteria Groups.

### Statistics Tracked

The following statistics are tracked for this transaction:

**Table A–44 Print Wave Statistics**

Statistic Name	Description
NumWavesChanged	Number of changed waves.

### Pending Job Count

For this transaction the pending job count is the number of records available to be processed by the transaction with the AVAILABLE\_DATE value less than or equal to ( $\leq$ ) the current date value in the YFS\_Task\_Q table.

### Events Raised

The following events are raised by this time-triggered transaction:

**Table A–45 Events Raised by the Print Wave Transaction**

Transaction/Event	Key Data	Data Published	Template Support?
ON_SUCCESS	wave_dbd.txt	WMS_PRINT_WAVE.ON_SUCCESS.xml	Yes

## A.2.16 Release Wave

This is a Task Q based time-triggered transaction, which works off a wave. It creates pick tasks for the shipment lines included in the wave.

This time-triggered transaction should be used to release a wave.

### Attributes

The following are the attributes for this time-triggered transaction:

**Table A–46 Release Wave Attributes**

Attribute	Value
Transaction Name	Release Wave
Transaction ID	RELEASE_WAVE.4001
Base Process Type	Outbound Picking
Base Document Type	Outbound Picking
Abstract Transaction	No
APIs Called	releaseWave( )
User Exits Called	com.yantra.wms.japi.ue.WMSOverridePickLocationAssignmentUE

### Criteria Parameters

The following are the criteria parameters for this transaction:

**Table A–47 Release Wave Criteria Parameters**

Parameter	Description
Action	Required. Triggers the transaction. If left blank, it defaults to Get, the only valid value.
Number of Records To Buffer	Optional. Number of records to retrieve and process at one time. If left blank or specified as 0 (zero), it defaults to 5000.
Next Task Queue Interval	Optional. Specifies in hours how long a failed task should be suspended before it is considered for reprocessing. Defaults to 5 hours.
Node	Required. The warehouse management ship node for which records are being processed.
AgentCriteriaGroup	Optional. Used to classify nodes. This value can be accepted by WMS time-triggered transactions that will only perform their tasks on the nodes with a matching node transactional velocity value.  Valid values are: LOW, HIGH, and any additional values defined by the Hub from Platform > System Administration > Agent Criteria Groups.

### Statistics Tracked

The following statistics are tracked for this transaction:

**Table A–48 Release Wave Statistics**

Statistic Name	Description
NumberOfShipmentsInException	Number of Shipments for which tasks could not be created for the Entire Quantity.
NumberOfTasksCreated	Number of tasks created.

### Pending Job Count

For this transaction the pending job count is the number of records available to be processed by the transaction with the AVAILABLE\_DATE value less than or equal to ( $\leq$ ) the current date value in the YFS\_Task\_Q table.

## Events Raised

The following events are raised by this time-triggered transaction:

**Table A–49 Events Raised by the Release Wave Transaction**

Transaction/Event	Key Data	Data Published	Template Support?
ON_SUCCESS	wave_dbd.txt	WMS_RELEASE_WAVE.ON_SUCCESS.xml	Yes

## A.2.17 Reopen Task

This transaction enables you to change task statuses from SUGGESTED to OPEN as needed in order to reassign a task to a different user.

For example, if users log out at the end of their shift with tasks in the SUGGESTED status that are assigned to them, you can set these tasks as REOPENED so that they can be reassigned to users who are currently available to complete these tasks.

This transaction also reopens and unassigns all tasks that have been in the SUGGESTED status for more than an hour.

## Attributes

The following are the attributes for this time-triggered transaction:

**Table A–50 Reopen Task Attributes**

Attribute	Value
Base Transaction ID	REOPEN_TASK
Base Document Type	General
Base Process Type	Task Execution
Abstract Transaction	No
APIs Called	changeTask ( )

## Criteria Parameters

The following are the criteria parameters for this transaction:



**Table A–51 Reopen Task Criteria Parameters**

Parameter	Description
AgentCriteriaId	Optional. For the specified agent criteria ID, tasks that have been SUGGESTED to a specific user, but that user is no longer logged in, are changed back to the OPEN status and made available for a new user assignment.
OrganizationCode	Optional. For the specified organization code, tasks that have been SUGGESTED to a specific user, but that user is no longer logged in, are changed back to OPEN status and made available for a new user assignment.

### Statistics Tracked

The following statistics are tracked for this transaction:

**Table A–52 Reopen Task Statistics**

Parameter	Description
TotalNumberOfTasksReOpened	Total number of tasks reopened.

### Pending Job Count

For this transaction the pending job count is the number of suggested Task Records (with TASK\_STATUS='1200') that have to be reopened.

### Events Raised

This transaction raises events specified by the `changeTask()` API in the *Yantra 7x Javadocs*.

## A.2.18 Request Batch Completion

Request Batch Completion is a time-triggered transaction that completes a batch after completing its tasks.

The `yfs.confirmbatch.online` property in the `yfs.properties` file is used to set this time-triggered transaction to work in online or offline mode.

- **Online mode:** In the online mode, the confirm batch transaction runs as usual, completing all tasks of the batch and then completing the batch in one commit boundary.
- **Offline mode:** In the offline mode, the confirm batch transaction triggers an agent and changes the batch status to 'Completion Requested'. When the agent runs, it completes either each task of the batch, or the batch itself, in an execution call.

The mode of operation (online or offline) is decided on the basis of a property defined in the `yfs.properties` file:

```
yfs.confirmbatch.online = Y/N
```

The default out-of-the-box shipped property causes the Request Batch Completion transaction to run in online mode.

**Note:** In instances where the Request Batch Completion transaction is run in offline mode, ensure that all Agent Criteria defined for the transaction are configured properly.

### Attributes

The following are the attributes for this time-triggered transaction:

**Table A–53 Request Batch Completion Attributes**

Attribute	Value
Transaction Name	Request Batch Completion
Transaction ID	REQ_BATCH_COMPLETION
Base Document Type	General
Base Process Type	Task Execution
Abstract Transaction	No
APIs Called	<code>registerBatchCompletion()</code> <code>registerTaskCompletion()</code>
User Exits Called	None

## Criteria Parameters

The following are the criteria parameters for this transaction:

**Table A–54 Request Batch Completion Criteria Parameters**

Parameter	Description
Action	Required. Triggers the transaction. If left blank, it defaults to Get, the only valid value.
Number of Records To Buffer	Optional. Number of records to retrieve and process at one time. If left blank or specified as 0 (zero), it defaults to 5000.
Node	Required. The warehouse management ship node for which records are being processed.
AgentCriteriaGroup	Optional. Used to classify nodes. This value can be accepted by WMS time-triggered transactions that will only perform their tasks on the nodes with a matching node transactional velocity value.  Valid values are: LOW, HIGH, and any additional values defined by the Hub from Platform > System Administration > Agent Criteria Groups.

## Statistics Tracked

The following statistics are tracked for this transaction:

**Table A–55 Request Batch Completion Statistics**

Statistic Name	Description
NumberOfBatchesCompleted	Number of batches completed.
NumberOfTasksCompleted	Number of tasks completed.

## Pending Job Count

For this transaction the pending job count is the number of batches and their tasks that can be completed.

## Events Raised

The following events are raised by this time-triggered transaction:

**Table A–56 Events Raised by the Request Batch Completion Transaction**

Transaction/Event	Key Data	Data Published	Template Support?
BATCH_COMPLETION_REQUESTED	batch_dbd.txt	YCP_REQ_BATCH_COMPLETION.BATCH_COMPLETION_REQUESTED.xml	Yes

## A.2.19 Cancel Wave

This time-triggered transaction is used to cancel waves. Waves can be cancelled either in offline or online mode, depending on the values set for the variable `yfs.cancelwave.offline.taskcount.greaterthan` defined in `yfs.properties`. Cancellation happens in the offline mode, if the number of wave tasks to be cancelled is greater than the value of the variable. Otherwise, cancellation happens in the online mode.

If cancellation happens in offline mode, the status of the wave changes to `Cancellation Requested (00)` on cancel wave operation. On successful cancellation, the wave status changes to `Cancelled`. If the cancellation fails due to some reason, the status of the wave changes to `Cancellation Failed (01)`.

### Attributes

The following are the attributes for this time-triggered transaction:

**Table A–57 Cancel Wave Attributes**

Attribute	Value
Transaction Name	Request Wave Cancellation
Transaction ID	CANCEL_WAVE
Base Document Type	Outbound Picking
Base Process Type	Outbound Picking
Abstract Transaction	None
APIs Called	<code>manageWave ( )</code>
User Exits Called	None

### Criteria Parameters

The following are the criteria parameters for this transaction:

**Table A–58** *Cancel Wave Criteria Parameters*

Parameter	Description
Action	Required. Triggers the transaction. If left blank, it defaults to Get, the only valid value.
Number of Records To Buffer	Optional. Number of records to retrieve and process at one time. If left blank or specified as 0 (zero), it defaults to 5000.
Node	Required. The warehouse management ship node for which records are being processed.
AgentCriteriaGroup	Optional. Used to classify nodes. This value can be accepted by WMS time-triggered transactions that will only perform their tasks on the nodes with a matching node transactional velocity value.  Valid values are: LOW, HIGH, and any additional values defined by the Hub from Platform > System Administration > Agent Criteria Groups.

### Statistics Tracked

No statistics are tracked for this transaction.

### Pending Job Count

No pending job counts are present for this transaction.

### Events Raised

The following events are raised by this time-triggered transaction:

**Table A–59 Events Raised by the Cancel Wave Transaction**

Transaction/Event	Key Data	Data Published	Template Support?
WAVE_ CANCELLATION_ REQUESTED	wave_dbd.txt	WMS_MANAGE_ WAVE.ON_ SUCCESS.xml	Yes
WAVE_ CANCELLATION_ FAILED	wave_dbd.txt	CANCEL_ WAVE.WAVE_ CANCELLATION_ FAILED.xml	Yes

## A.2.20 Cancel Move

This time-triggered transaction is used to cancel move request. Move request cancellation can happen either in offline or online mode, depending on the values set for the variable `yfs.cancelmove.offline.taskcount.greaterthan` defined in `yfs.properties`. Move request cancellation happens in the offline mode, if the number of move request tasks to be cancelled is greater than the value of the variable. Otherwise, cancellation happens in the online mode.

If cancellation happens in the offline mode, the status of the move request changes to `Cancellation Requested` and on successful cancellation, the status changes to `Closed`. If the cancellation fails due to some reason, the status changes to `Cancellation Failed`.

### Attributes

The following are the attributes for this time-triggered transaction:

**Table A–60 Cancel Move Attributes**

Attribute	Value
Transaction Name	Request Move Cancellation
Transaction ID	CANCEL_MOVE_REQUEST
Base Document Type	Move Request Execution
Base Process Type	Move Request Execution
Abstract Transaction	None

**Table A–60 Cancel Move Attributes**

Attribute	Value
APIs Called	cancelTask ( )
User Exits Called	None

### Criteria Parameters

The following are the criteria parameters for this transaction:

**Table A–61 Cancel Move Criteria Parameters**

Parameter	Description
Action	Required. Triggers the transaction. If left blank, it defaults to Get, the only valid value.
Number of Records To Buffer	Optional. Number of records to retrieve and process at one time. If left blank or specified as 0 (zero), it defaults to 5000.
Node	Required. The warehouse management ship node for which records are being processed.
AgentCriteriaGroup	Optional. Used to classify nodes. This value can be accepted by WMS time-triggered transactions that will only perform their tasks on the nodes with a matching node transactional velocity value.  Valid values are: LOW, HIGH, and any additional values defined by the Hub from Platform > System Administration > Agent Criteria Groups.

### Statistics Tracked

No statistics are tracked for this transaction.

### Pending Job Count

No pending job counts are present for this transaction.

### Events Raised

The following events are raised by this time-triggered transaction:

**Table A–62 Events Raised by the Cancel Move Transaction**

Transaction/Event	Key Data	Data Published	Template Support?
MOVE_ CANCELLATION_ REQUESTED	WMS_ cancelMoveRe quest_input_ dtd_txt	WMS_CANCEL_ MOVE_REQUEST.ON_ SUCCESS.xml	Yes
MOVE_ CANCELLATION_ FAILED	None	WMS_CANCELMOVE_ REQUEST.MOVE_ CANCELLATION_ FAILED.xml	Yes

### A.2.21 Re-Calculate Location Dimensions

This time-triggered transaction is used to re-calculate the available weight or volume of the locations. This transaction is used in:

- Calculation of available weight or volume of:
  - Locations that have inventory, whose weight or volume has changed.
  - Locations, whose location size code has changed.
  - Locations associated with a location size, whose weight or volume has changed.
- Calculation of weight or volume of cases or pallets having inventory, whose weight or volume has changed.

#### Attributes

The following are the attributes for this time-triggered transaction:

**Table A–63 Relocate Location Dimension Attributes**

Attribute	Value
Transaction Name	Recalculate Location Dimensions
Transaction ID	RECALC_LOCN_DIMENSIONS
Base Document Type	WMS Layout Definition
Base Process Type	General



**Table A–63 Relocate Location Dimension Attributes**

Attribute	Value
Abstract Transaction	None
APIs Called	None
User Exits Called	None

### Criteria Parameters

The following are the criteria parameters for this transaction:

**Table A–64 Relocate Location Dimension Criteria Parameters**

Parameter	Description
Action	Required. Triggers the transaction. If left blank, it defaults to Get.
Zone ID	Optional. Used to get list of locations for which the dimensions have to be re-calculated.
Location ID	Optional. Location for which the dimensions have to be re-calculated.
Node	Optional. The warehouse management ship node for which records are being processed.
RecalcReason	Required. This attribute identifies if the item size or location dimensions are changed. Valid values are LocationSizeChange and ItemSizeChange.
AgentCriteriaGroup	Optional. Used to classify nodes. This value can be accepted by WMS time-triggered transactions that will only perform their tasks on the nodes with a matching node transactional velocity value. Valid values are: LOW, HIGH, and any additional values defined by the Hub from Platform > System Administration > Agent Criteria Groups.
Location Size Code	Required if RecalcReason is LocationSizeChange and Location ID is not given. Used to get list of locations, which need recalculation of dimensions.

**Table A–64 Relocate Location Dimension Criteria Parameters**

Parameter	Description
Item ID	Required along with Unit Of Measure and Enterprise Code, if RecalcReason is ItemSizeChange.
Unit Of Measure	Required along with Item ID and Enterprise Code, if RecalcReason is ItemSizeChange. Used to get list of locations, which need recalculation of dimensions.
Enterprise Code	Required with Unit of Measure and Item ID, if RecalcReason is ItemSizeChange. Used to get list of locations, which need recalculation of dimensions.
Old Unit Weight	Optional. Along with Item ID, Unit of Measure and Enterprise Code, if RecalcReason is ItemSizeChange. Used to update the weight of case or pallet which already has the item.

### Statistics Tracked

No statistics are tracked for this transaction.

### Pending Job Count

No pending job counts are present for this transaction.

### Events Raised

No events are raised for this transaction.

## A.3 Purge Time-Triggered Transactions

There are several transactions that you can use to purge your database tables at specific time intervals.

Purge transactions determine when a table should be purged by determining the current date and subtracting the retention days specified by the purge. If the timestamp on the table is less than or equal to (current day - retention days) the table is purged.

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**Note:** In some cases a purge may look at another field other than the table's timestamp. These are pointed out in the documentation.

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**Note:** When purging an entity, take into consideration all of the information that is purged along with it. For example, if a sales order with live shipments is purged, the order does not appear in the order number field in the Outbound Shipment Console.

---

### A.3.1 Purge Strategy

The following recommendations should be taken into consideration when planning a purge strategy for each purge transaction:

- Test purges by setting Live to 'N'.
- Turn on logging to test what is purged.
- Set up purge traces in the System Management Console and analyze the information.

### A.3.2 Configuring Purge Transaction Log Files

You can configure purges to write log files to a directory you specify. Each time you run a particular purge, new data is appended to this file. If no file exists, one is created.

To specify purge log file directory:

1. Edit the <YFS\_HOME>/resources/yfs.properties file.
2. Set `yfs.purge.path=<full absolute path of log directory>`.

For example, on UNIX you might specify the log files to be written to the `/app/yfs/logs/purges` directory.

### A.3.3 Available Purges

The time-triggered purge transactions are:

- [Activity Demand Purge](#)

- [Count Request Purge](#)
- [Dock Appointment Purge](#)
- [Location Inventory Audit Purge](#)
- [Move Request Purge](#)
- [Productivity Purge](#)
- [Task History Purge](#)
- [Task Purge](#)
- [User Activity Purge](#)
- [Wave Purge](#)

**A.3.3.1 Activity Demand Purge**

This time-triggered transaction purges all the Satisfied Activity Demand records for a period greater than the retention days specified in the Activity Demand Purge criteria.

**Attributes**

The following are the attributes for this time-triggered transaction:

*Table A–65 Activity Demand Purge Attributes*

Attribute	Value
Base Transaction ID	ACTIVITYDEMANDPRG
Base Document Type	General
Base Process Type	WMS Putaway
Abstract Transaction	No
APIs Called	None
User Exits Called	YFSBeforePurgeUE

**Criteria Parameters**

The following are the criteria parameters for this transaction:

**Table A–66 Activity Demand Purge Criteria Parameters**

Parameter	Description
Action	Required. Triggers the transaction. If left blank, it defaults to Get, the only valid value.
Number of Records To Buffer	Optional. Number of records to retrieve and process at one time. If left blank or specified as 0 (zero), it defaults to 5000.
EnterpriseCode	Optional. Enterprise for which the Activity Demand Purge needs to be run. If not passed, then all enterprises are monitored.
Node	Optional. Node for which the Activity Demand Purge needs to be run. If not passed, then all nodes are monitored.
AgentCriteriaGroup	Optional. Used to classify nodes. This value can be accepted by WMS time-triggered transactions that perform their tasks on the nodes with a matching node transactional velocity value.  Valid values are: LOW, HIGH, and any additional values defined by the Hub from Applications > Platform > System Administration > Agent Criteria Groups.
PurgeCode	Required. Cannot be modified. Used for internal calculations, such as determining retention days. Corresponds with the PurgeCode used in the Business Rules Purge Criteria.
Live	Optional. Mode in which to run. Valid values are: <ul style="list-style-type: none"> <li>Y - Production mode. Deletes records from the regular tables. Default.</li> <li>N - Test mode.</li> </ul>

### Statistics Tracked

The following statistics are tracked for this transaction:

**Table A–67 Activity Demand Purge Statistics**

Statistic Name	Description
NumActivityDemandsPurged	Number of Activity Demands purged.

**Pending Job Count**

For this transaction the pending job count is the number of records that can be purged from the YFS\_ACTIVITY\_DEMAND table.

**Events Raised**

None.

**Tables Purged**

YFS\_ACTIVITY\_DEMAND

**A.3.3.2 Count Request Purge**

This time-triggered transaction purges all the count requests for a period greater than the retention days specified in the Count Purge criteria and those, which are either in the status of cancelled or completed.

**Attributes**

The following are the attributes for this time-triggered transaction:

*Table A–68 Count Request Purge Attributes*

Attribute	Value
Base Transaction ID	COUNTPRG
Base Document Type	Count
Base Process Type	Count Execution
Abstract Transaction	No
APIs Called	None
User Exits Called	YFSBeforePurgeUE

**Criteria Parameters**

The following are the criteria parameters for this transaction:

**Table A–69** *Count Request Purge Criteria Parameters*

Parameter	Description
Action	Required. Triggers the transaction. If left blank, it defaults to Get, the only valid value.
PurgeCode	Required. Cannot be modified. Used for internal calculations, such as determining retention days. Corresponds with the PurgeCode used in Business Rules Purge Criteria.
Live	Optional. Mode in which to run. Valid values are: <ul style="list-style-type: none"> <li>Y - Production mode. Deletes records from the regular tables. Default.</li> <li>N - Test mode.</li> </ul>
Number of Records To Buffer	Optional. Number of records to retrieve and process at one time. If left blank or specified as 0 (zero), it defaults to 5000.
AgentCriteriaGroup	Optional. Used to classify nodes. This value can be accepted by WMS time-triggered transactions that will only perform their tasks on the nodes with a matching node transactional velocity value.  Valid values are: LOW, HIGH, and any additional values defined by the Hub from Platform > System Administration > Agent Criteria Groups.
EnterpriseCode	Optional. Enterprise for which the Count Request Purge needs to be run. If not passed, then all enterprises are monitored.
Node	Optional. Node for which the Count Request Purge needs to be run. If not passed, then all nodes are monitored.

**Statistics Tracked**

The following statistics are tracked for this transaction:

**Table A–70 Count Request Purge Statistics**

Statistic Name	Description
NumCountRequestsPurged	Number of count requests purged.
NumCountResultsPurged	Number of count results purged.

**Pending Job Count**

For this transaction the pending job count is the number of records that can be purged from the YFS\_COUNT\_REQUEST table.

**Events Raised**

None.

**Tables Purged**

YFS\_COUNT\_RESULT\_TAG

YFS\_COUNT\_RESULT

YFS\_COUNT\_REQUEST

**A.3.3.3 Dock Appointment Purge**

This time-triggered transaction purges all dock appointment details for a period greater than the retention days specified in the Dock Appointment Purge criteria, and if the resource pool consumption detail do not exist for the specified dock appointment.

**Attributes**

The following are the attributes for this time-triggered transaction:

**Table A–71 Dock Appointment Purge Attributes**

Attribute	Value
Base Transaction ID	DOCKAPPOINTMENTPRG
Base Document Type	None
Base Process Type	General
Abstract Transaction	No



**Table A–71 Dock Appointment Purge Attributes**

Attribute	Value
APIs Called	None
User Exits Called	YFSBeforePurgeUE

### Criteria Parameters

The following are the criteria parameters for this transaction:

**Table A–72 Dock Appointment Purge Criteria Parameters**

Parameter	Description
Action	Required. Triggers the transaction. If left blank, it defaults to Get, the only valid value.
PurgeCode	Required. Cannot be modified. Used for internal calculations, such as determining retention days. Corresponds with the PurgeCode used in Business Rules Purge Criteria.
Live	Optional. Mode in which to run. Valid values are: <ul style="list-style-type: none"> <li>Y - Production mode. Deletes records from the regular tables. Default.</li> <li>N - Test mode.</li> </ul>
AgentCriteriaGroup	Optional. Used to classify nodes. This value can be accepted by WMS time-triggered transactions that will only perform their tasks on the nodes with a matching node transactional velocity value.  Valid values are: LOW, HIGH, and any additional values defined by the Hub from Platform > System Administration > Agent Criteria Groups.

### Statistics Tracked

The following statistics are tracked for this transaction:

**Table A–73 Dock Appointment Purge Statistics**

Statistic Name	Description
NumDockAppointmentsPurged	Number of dock appointments purged.

Events Raised

None.

Tables Purged

YFS\_DOCK\_APPOINTMENT

A.3.3.4 Location Inventory Audit Purge

This time-triggered transaction purges all the Location Inventory Audit details for a period greater than the retention days specified in the Location Inventory Audit Purge criteria.

**Note:** Number of threads for this purge's agent criteria details must be set to 1. For more information about agent criteria, refer to the *Yantra 7x Platform Configuration Guide*.

Attributes

The following are the attributes for this time-triggered transaction:

Table A–74 Location Inventory Audit Purge Attributes

Attribute	Value
Base Transaction ID	LOCNINVAUDITPRG
Base Document Type	General
Base Process Type	WMS Inventory
Abstract Transaction	No
APIs Called	None
User Exits Called	YFSBeforePurgeUE

Criteria Parameters

The following are the criteria parameters for this transaction:

**Table A–75 Location Inventory Audit Purge Criteria Parameters**

Parameter	Description
Action	Required. Triggers the transaction. If left blank, it defaults to Get, the only valid value.
Number of Records To Buffer	Optional. Number of records to retrieve and process at one time. If left blank or specified as 0 (zero), it defaults to 5000.
EnterpriseCode	Optional. Enterprise for which the Location Inventory Audit Purge needs to be run. If not passed, then all enterprises are monitored.
Node	Optional. Node for which the Location Inventory Audit Purge needs to be run. If not passed, then all nodes are monitored.
AgentCriteriaGroup	Optional. Used to classify nodes. This value can be accepted by WMS time-triggered transactions that will only perform their tasks on the nodes with a matching node transactional velocity value.  Valid values are: LOW, HIGH, and any additional values defined by the Hub from Platform > System Administration > Agent Criteria Groups.
PurgeCode	Required. Cannot be modified. Used for internal calculations, such as determining retention days. Corresponds with the PurgeCode used in Business Rules Purge Criteria.
Live	Optional. Mode in which to run. Valid values are: <ul style="list-style-type: none"> <li>Y - Production mode. Deletes records from the regular tables. Default.</li> <li>N - Test mode.</li> </ul>

### Statistics Tracked

The following statistics are tracked for this transaction:

**Table A–76 Location Inventory Audit Purge Statistics**

Statistic Name	Description
NumLocationInventoryAudits Purged	Number of location inventory audits purged.

### Pending Job Count

For this transaction the pending job count is the number of records that can be purged from the YFS\_LOCN\_INVENTORY\_AUDIT table.

### Events Raised

None.

### Tables Purged

YFS\_LOCN\_INVENTORY\_AUDIT

### A.3.3.5 Move Request Purge

This time-triggered transaction purges all the Move requests that are in the CLOSED status (having been cancelled or completed), and those that are existing for a period greater than the retention days specified in the Move Request Purge criteria.

A move request is picked up for purge if it meets the following criteria:

1. The move request's last modification should fall before the lead time setup.
2. The move request should be in "Closed" status.

**Note:** If a move request has a cross-dock activity (activity demand) associated with it, the number of retention days specified in the purge criteria should be inclusive of the time required to complete the activity.

### Attributes

The following are the attributes for this time-triggered transaction:

**Table A–77** *Move Request Purge Attributes*

Attribute	Value
Base Transaction ID	MOVEREQUESTPRG
Base Document Type	General
Base Process Type	General
Abstract Transaction	No
APIs Called	None
User Exits Called	YFSBeforePurgeUE

### Criteria Parameters

The following are the criteria parameters for this transaction:

**Table A–78** *Move Request Purge Criteria Parameters*

Parameter	Description
Action	Required. Triggers the transaction. If left blank, it defaults to Get, the only valid value.
PurgeCode	Required. Cannot be modified. Used for internal calculations, such as determining retention days. Corresponds with the PurgeCode used in Business Rules Purge Criteria.
Live	Optional. Mode in which to run. Valid values are: <ul style="list-style-type: none"> <li>Y - Production mode. Deletes records from the regular tables. Default.</li> <li>N - Test mode.</li> </ul>

**Table A–78 Move Request Purge Criteria Parameters**

Parameter	Description
Number of Records To Buffer	Optional. Number of records to retrieve and process at one time. If left blank or specified as 0 (zero), it defaults to 5000.
AgentCriteriaGroup	Optional. Used to classify nodes. This value can be accepted by WMS time-triggered transactions that will only perform their tasks on the nodes with a matching node transactional velocity value.  Valid values are: LOW, HIGH, and any additional values defined by the Hub from Platform > System Administration > Agent Criteria Groups.

**Statistics Tracked**

The following statistics are tracked for this transaction:

**Table A–79 Move Request Purge Statistics**

Statistic Name	Description
NumMoveRequestLinesPurged	Number of move request lines purged.
NumMoveRequestsPurged	Number of move requests purged.

**Pending Job Count**

For this transaction the pending job count is the number of records that can be purged from the YFS\_MOVE\_REQUEST table.

**Events Raised**

None.

**Tables Purged**

YFS\_MOVE\_REQUEST\_LINE\_TAG

YFS\_MOVE\_REQUEST\_LINE

YFS\_MOVE\_REQUEST\_STATUS\_AUDIT

YFS\_MOVE\_REQUEST

### A.3.3.6 Productivity Purge

This time-triggered transaction purges productivity data for a period greater than the lead\_days specified in the Productivity Purge criteria for a specific OrganizationCode.

#### Attributes

The following are the attributes for this time-triggered transaction:

**Table A–80 Productivity Purge Attributes**

Attribute	Value
Base Transaction ID	PRODUCTIVITYPRG
Base Document Type	General
Base Process Type	General
Abstract Transaction	No
APIs Called	None
User Exits Called	YFSBeforePurgeUE

#### Criteria Parameters

The following are the criteria parameters for this transaction:

**Table A–81 Productivity Purge Criteria Parameters**

Parameter	Description
Action	Required. Triggers the transaction. If left blank, it defaults to Get, the only valid value.
PurgeCode	Required. Cannot be modified. Used for internal calculations, such as determining retention days. Corresponds with the PurgeCode used in Business Rules Purge Criteria.
Live	Optional. Mode in which to run. Valid values are: <ul style="list-style-type: none"> <li>Y - Production mode. Deletes records from the regular tables. Default.</li> <li>N - Test mode.</li> </ul>

**Table A–81 Productivity Purge Criteria Parameters**

Parameter	Description
Number of Records To Buffer	Optional. Number of records to retrieve and process at one time. If left blank or specified as 0 (zero), it defaults to 5000.
EnterpriseCode	Optional. Enterprise for which the Productivity Purge needs to be run. If not passed, then all enterprises are monitored.
Organization Code	Optional. Organization for which the Productivity Purge needs to be run. If not passed, then all organizations are monitored.

### Statistics Tracked

The following statistics are tracked for this transaction:

**Table A–82 Productivity Purge Statistics**

Statistic Name	Description
NumProductivityRecordsPurged	Number of productivity records purged.

### Pending Job Count

For this transaction the pending job count is the number of records that can be purged from the YFS\_PRODUCTIVITY table.

### Events Raised

None.

### Tables Purged

YFS\_PRODUCTIVITY

### A.3.3.7 Task History Purge

This transaction deletes tasks previously archived by the Task Purge. See the [Section A.3.3.8, "Task Purge"](#) on page 1045.

### Attributes

The following are the attributes for this time-triggered transaction:



**Table A–83 Task History Purge Attributes**

Attribute	Value
Base Transaction ID	TASKHISTORYPURGE
Base Document Type	General
Base Process Type	TASK_EXECUTION
Abstract Transaction	No
APIs Called	None
User Exits Called	YFSBeforePurgeUE

### Criteria Parameters

The following are the criteria parameters for this transaction:

**Table A–84 Task History Purge Criteria Parameters**

Parameter	Description
Action	Required. Triggers the transaction. If left blank, it defaults to Get, the only valid value.
Live	Optional. Mode in which to run. Valid values are: <ul style="list-style-type: none"> <li>Y - Production mode. Deletes records from the statistics tables. Default.</li> <li>N - Test mode. Generates a report that lists the statistics eligible for being purged.</li> </ul>
PurgeCode	Required. Cannot be modified. Used for internal calculations, such as determining retention days. Corresponds with the PurgeCode used in Business Rules Purge Criteria.

Table A–84 Task History Purge Criteria Parameters

Parameter	Description
Organization Code	Optional. Organization for which the Task History purge needs to be run. If not passed, then all organizations are monitored.
AgentCriteriaGroup	Optional. Used to classify nodes. This value can be accepted by WMS time-triggered transactions that will only perform their tasks on the nodes with a matching node transactional velocity value.  Valid values are: LOW, HIGH, and any additional values defined by the Hub from Platform > System Administration > Agent Criteria Groups.

Statistics Tracked

The following statistics are tracked for this transaction:

Table A–85 Task History Purge Statistics

Statistic Name	Description
NumHistoryTasksPurged	Number of history tasks purged.

Pending Job Count

For this transaction the pending job count is the number of records that can be purged from the YFS\_TASK\_H table.

Events Raised

None.

Tables Purged

- YFS\_BATCH\_H
- YFS\_BATCH\_LOCATION\_H
- YFS\_TASK\_H
- YFS\_TASK\_STATUS\_AUDIT\_H

### A.3.3.8 Task Purge

This transaction uses the YFS\_Task table to find the tasks (as well as task batches and batch locations) that can be purged and then archives them to history tables. This purge also updates records in YFS\_User\_Tran\_Constraints to inactive if there are no open tasks for the set of references in the YFS\_User\_Tran\_Constraints record.

In order for these tasks and batches to be archived, they must be in one of the following statuses:

- Completed (2000)
- Canceled (9000)

In addition, a task is purged only under the following conditions:

- A task is purged only when its dependent tasks can also be purged.
- A task belonging to a Task Type associated with a Productivity Type is purged only after productivity metric has been captured by running the Mine Productivity transaction.
- An Outbound Picking task is purged only after any shipments associated with it have been closed.

A task is picked up for purge if it meets the following criteria:

1. The task's last modification should fall before the lead time setup.
2. The task status should be in "Completed" or "Canceled" status.
3. If the task type is associated with a productivity type, then the task record should have a productivity key.
4. All dependent tasks should meet the above criteria.

### Attributes

The following are the attributes for this time-triggered transaction:

**Table A–86 Task Purge Attributes**

Attribute	Value
Base Transaction ID	TASKPURGE
Base Document Type	General
Base Process Type	TASK_EXECUTION

**Table A–86 Task Purge Attributes**

Attribute	Value
Abstract Transaction	No
APIs Called	None
User Exits Called	YFSBeforePurgeUE

### Criteria Parameters

The following are the criteria parameters for this transaction:

**Table A–87 Task Purge Criteria Parameters**

Parameter	Description
Action	Required. Triggers the transaction. If left blank, it defaults to Get, the only valid value.
Number of Records To Buffer	Optional. Number of records to retrieve and process at one time. If left blank or specified as 0 (zero), it defaults to 5000.
Live	Optional. Mode in which to run. Valid values are: <ul style="list-style-type: none"> <li>Y - Production mode. Deletes records from the statistics tables. Default.</li> <li>N - Test mode. Generates a report that lists the statistics eligible for being purged.</li> </ul>
PurgeCode	Required. Cannot be modified. Used for internal calculations, such as determining retention days. Corresponds with the PurgeCode used in Business Rules Purge Criteria.

**Table A–87 Task Purge Criteria Parameters**

Parameter	Description
Organization Code	Optional. Organization for which the Task purge needs to be run. If not passed, then all organizations are monitored.
AgentCriteriaGroup	Optional. Used to classify nodes. This value can be accepted by WMS time-triggered transactions that will only perform their tasks on the nodes with a matching node transactional velocity value.  Valid values are: LOW, HIGH, and any additional values defined by the Hub from Platform > System Administration > Agent Criteria Groups.

### Statistics Tracked

The following statistics are tracked for this transaction:

**Table A–88 Task Purge Statistics**

Statistic Name	Description
NumTasksPurged	Number of tasks purged.

### Pending Job Count

For this transaction the pending job count is the number of records that can be purged from the YFS\_TASK table.

### Events Raised

None.

### Tables Purged

YFS\_TASK

YFS\_TASK\_STATUS\_AUDIT

YFS\_BATCH

YFS\_BATCH\_LOCATION

YFS\_AUTO\_USER\_CONSTRAINTS (When there are no open tasks for the references in the constraints)

### A.3.3.9 User Activity Purge

This transactions purges all activity records from the table older than the specified retention days.

This agent should be used whenever user activity records need to be removed, such as after a application server restart.

#### Attributes

The following are the attributes for this time-triggered transaction:

**Table A–89 User Activity Purge Attributes**

Attribute	Value
Base Transaction ID	USERACTIVITYPRG
Base Document Type	General
Base Process Type	General
Abstract Transaction	No
APIs Called	None
User Exits Called	YFSBeforePurgeUE

#### Criteria Parameters

The following are the criteria parameters for this transaction:

**Table A–90 User Activity Purge Criteria Parameters**

Parameter	Description
Action	Required. Triggers the transaction. If left blank, it defaults to Get, the only valid value.
Number of Records To Buffer	Optional. Number of records to retrieve and process at one time. If left blank or specified as 0 (zero), it defaults to 5000.
PurgeCode	Required. Cannot be modified. Used for internal calculations, such as determining retention days. Corresponds with the PurgeCode used in Business Rules Purge Criteria.

## Statistics Tracked

The following statistics are tracked for this transaction:

**Table A–91** *User Activity Purge Statistics*

Parameter	Description
NumActivitiesPurged	Number of records purged from the User Activity table.

## Pending Job Count

For this transaction the pending job count is the number of records that can be purged from the YFS\_USER\_ACTIVITY table.

## Events Raised

None.

## Tables Purged

YFS\_USER\_ACTIVITY

### A.3.3.10 Wave Purge

This purge deletes data after a wave has completed its typical lifecycle. This reduces load from the frequently accessed tables. This transaction works on a task queue. It picks up the waves from YFS\_TASK\_Q table that are available for this transaction. Waves are then purged if they have not been modified within the time specified in the purge criteria configuration.

## Attributes

The following are the attributes for this time-triggered transaction:

**Table A–92** *Wave Purge Attributes*

Attribute	Value
Base Transaction ID	YFS_Wave
Base Document Type	Outbound Picking
Base Process Type	OUTBOUND_PICKING
Abstract Transaction	No

**Table A–92 Wave Purge Attributes**

Attribute	Value
APIs Called	None
User Exits Called	YFSBeforePurgeUE

### Criteria Parameters

The following are the criteria parameters for this transaction:

**Table A–93 Wave Purge Criteria Parameters**

Parameter	Description
Action	Required. Triggers the transaction. If left blank, it defaults to Get, the only valid value.
PurgeCode	Required. Cannot be modified. Used for internal calculations, such as determining retention days. Corresponds with the PurgeCode used in Business Rules Purge Criteria.
Live	Optional. Mode in which to run. Valid values are: <ul style="list-style-type: none"> <li>Y - Production mode. Deletes records from the regular tables. Default.</li> <li>N - Test mode.</li> </ul>
Number of Records To Buffer	Optional. Number of records to retrieve and process at one time. If left blank or specified as 0 (zero), it defaults to 5000.
Node	Optional. Node for which the Wave Purge needs to be run. If not passed, then all nodes are monitored.
AgentCriteriaGroup	Optional. Used to classify nodes. This value can be accepted by WMS time-triggered transactions that will only perform their tasks on the nodes with a matching node transactional velocity value.  Valid values are: LOW, HIGH, and any additional values defined by the Hub from Platform > System Administration > Agent Criteria Groups.



**Statistics Tracked**

The following statistics are tracked for this transaction:

*Table A–94 Wave Purge Statistics*

Statistic Name	Description
NumWavesPurged	Number of waves purged.

**Pending Job Count**

For this transaction the pending job count is the number of records that can be purged from the YFS\_WAVE table.

**Events Raised**

None.

**Tables Purged**

YFS\_WAVE



## Copy Node Functionality

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This appendix lists all configurations that get copied when copying a node.

### 1. Warehouse Management

#### a. Warehouse Layout

- Location Size  
Location Capacity
- Location Storage Code
- Zones  
Zone Enterprise Storage Constraints
- Locations  
The transaction information such as available capacity is reset to location capacity.
- SKU Dedication
- Equipments and Stations

#### b. Inventory

- Inventory Status
- Inventory Adjustment Reason
- Inventory Status Transition
- Inventory Monitor Rule
- Adjustment Location Sequence
- Count Programs

- Count Strategy
  - Location Monitor Rule (and Filter)
- c. Receiving
  - Putaway Rules
    - Activity Constraints
  - Location Preference
  - Node Disposition
- d. Picking
  - Shipment Group
  - Sort Strategy
  - PLA Activity Determination
  - PLA Upgrade UOM
  - PLA Zone Attributes
  - PLA Retrieval Attribute
  - Shipment Selector Attribute
  - Wave Size Constraint
  - PLA UOM Condition
  - PLA Activity Task Type
  - PLA Condition Attribute
  - PLA Zone Set
- e. VAS
  - Retrieval Strategy
    - Though retrieval strategy is listed under VAS, it is also copied for other activity groups.
- f. Packing
  - Pack Strategy
- g. Task Management
  - Batch Rule

- Execution Exception
- Productivity Type
- Purge Criterion
- Task Type
- User Skill Set
- h. System Administration
  - Bar Code Translation
  - Device
  - Device Sub Type
  - Label Preferences
- 2. Platform (miscellaneous)
  - Calendar
  - Calendar Shift
  - Calendar Shift Effective Period
  - Calendar Day Exception
  - Common Code
  - Ship Node
  - Data Security Group
  - Data Security Enterprise
  - Data Security Doc Type



# Onboarding Enterprise to Node Functionality

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This appendix lists all the configurations that get copied when onboarding an enterprise to a node.

1. Warehouse Management
  - a. Warehouse Layout
    - Location Capacity
    - Zone Enterprise Storage Constraints
    - SKU Dedication
  - b. Inventory
    - Inventory Adjustment Reason
    - Count Programs
    - Count Strategy
    - Location Monitor Rule (and Filter)
  - c. Receiving
    - Putaway Rules
      - Activity Constraints
    - Receiving Preferences
    - Node Disposition
  - d. Packing
    - Pack Strategy

- e. System Administration
  - Label Preferences
- 2. Platform (miscellaneous)
  - Organization Enterprise









# D





## Setting Up a Weighing Scale

---

A weighing scale is a device that records a container's weight. Weighing scales are typically used in manifest, pack and weighing stations to record weight.

To configure and setup a weighing scale:

1. From the tree in the application rules side panel, choose System Administration > Devices. The DeviceSetup window appears.
2. Select Device Types and choose . The Device Type pop-up window appears.
3. In Device Type, enter a name for the device type. For example, Weighing Scale.
4. In Description, enter a brief description of the device type.
5. Choose . The Device Type pop-up window appears. You can view the Weighing Scale device type that you entered.
6. Select Weighing Scale and choose . The Device Sub Type pop-up window appears.
7. In Device Sub Type, enter a name for the device sub type. For example, WeighScale-Desc.
8. In Description, enter a brief description for the device sub type.
9. Choose . The Device Type pop-up window appears. Choose  to view WeighScale-Desc device sub type that you entered.
10. Select the WeighScale-Desc device sub type for which you want to create a device.
11. Choose . The Device pop-up window appears.

12. In Device ID, enter the device identifier. For example, WeighScale-01.
13. In Additional Attributes panel, under Device Attributes, enter the parameter value for the ClassName as `com.yantra.ycp.ui.io.YCPToledoPSImpl`.
14. Enter the parameter value for the PortId to which the weighing scale is connected, if applicable. For example, COM1.
15. Choose . Now, configure a station for the weighing scale and associate it with a location. For more information on creating and configuring a station, see [Section 3.11, "Defining Stations"](#).
16. To associate the weighing scale to a station identifier, from the tree in the application rules side panel, choose Warehouse Layout > Stations.
17. In the Stations window, choose  to view the Station Id. For example, PACK\_STATION\_1.
18. Select the PACK\_STATION\_1 station-id. Choose . The Station Device Association pop-up window appears.
19. In the Device Association panel, select Weighing Scale device type and WeighScale-01 device identifier from the drop-down list.
20. Choose .

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