Sterling Store Inventory Management

Configuration Guide

Release 9.2

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Note
Before using this information and the product it supports, read the information in "Notices" on page 183.

Contents

Chapter 1. Introduction to the IBM Sterling Store Inventory Management Configurator

The Sterling Store Inventory Management Configurator is a collection of rules and configurations that are necessary to implement Sterling Store Inventory Management. The intended audience includes both Hub and Enterprise administrators who are responsible for configuring and maintaining a store can use the Sterling Store Inventory Management Configurator to set up a store for their business.

Important: It is assumed that you have read and is familiar with the concepts and business functionality explained in the *Sterling Store Inventory Management: Concepts Guide*.

Before any store is made operational on the Sterling Store Inventory Management, the node needs to be configured as a store. The store configuration uses a new approach called guided configuration. The guided configuration supplies many default values for your store configuration, and requires that you visit a minimal number of screens. It is a task-based configuration.

All tasks are represented in the form of a tree. A task can be a grouped task or leaf task. A grouped task is a task for which child tasks exist. A leaf task is a task for which no child task exists.

The status of any task can be complete, not complete, or locked. The status of a grouped task is dependant on the status of its child tasks. For example, if the child tasks are complete, the status of the grouped task is automatically set to complete.

Tasks that are locked are dependant on other tasks for completion. For example, if the Onboard A Store task is dependant on the Configure Enterprise Profile task, you can onboard a store only after completing the configuration of the enterprise profile. Until then, the Onboard A Store task is in locked status.

When a new store is created, it is either created according to an existing model store or as a new model store. A model store is a store from which processes are inherited to the follower stores. You must configure business processes and rules for a model store, which are inherited by other stores.

There are certain configurations that are specific to a store. Such configurations need to be configured at the store. For example, a store manager needs to ensure that users in the store have access to only the required information for carrying out their tasks.

Chapter 2. Navigating in the Configurator

Access the IBM Sterling Store Inventory Management Configurator

About this task

To access the Store Inventory Management Configurator, perform the following steps:

Procedure

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

   Here,

   - hostname is the computer name or IP address of the computer where Sterling Store Inventory Management is installed.
   - portnumber is the listening port of the computer where Sterling Store Inventory Management is installed.

     The browser displays the Sign In window.
2. Enter your login ID and password, and click the Sign In button. The Application Console home page displays.
3. From the Application Console menu bar, select Configuration > Launch Store Inventory Management Configurator. The Sterling Store Inventory Management Configurator opens in a new window.

   Note: Your User ID must belong to the SOP-ADMIN user group to launch the Store Inventory Management Configurator.

Access the Applications Manager

About this task

To access the Applications Manager, perform the following steps:

Procedure

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

   Here,

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

     The browser displays the Sign In window.
2. Enter your login ID and password, and click the Sign In button. The Application Console home page displays.
3. From the Application Console menu bar, select Configuration > Launch Applications Manager. The Applications Manager opens in a new window.
4. From the Applications Manager menu bar, select Applications > Store Inventory Management. The Node pop-up window opens.

5. From the Node to be configured drop-down list, select the store that you want to work with.
6. From the Enterprise drop-down list, select the enterprise for the store that you want to configure.
7. Click **OK**. The rules for the store is displayed in the application rules side panel.

   Note: The selected store and enterprise you are working with is displayed in parentheses.

Chapter 3. Understanding IBM Sterling Store Inventory Management Configurator Layout

The Sterling Store Inventory Management Configurator is a graphical user interface that you can use to configure different aspects of the application. The different configurations are defined by logical groupings that can be accessed from the Sterling Store Inventory Management Configurator's main screen.

Each logical grouping focuses on a particular aspect of the Sterling Store Inventory Management and contains rules, common codes, and settings necessary for the application to work in a real-world business setting.

The Sterling Store Inventory Management Configurator displays groupings by way of an information tree. To expand each grouping, click the plus sign located next to the group's name. When a group expands, each specific configuration associated with that group is displayed.

Next to each specific configuration, there is an icon, which indicates the progress of the configuration. When you place the mouse over the icon, the current status of the configuration is displayed.

Table 1. Task Icons

Task Icon	Description
	This icon indicates that the task is not complete.
	This icon indicates that the task is complete.
	This icon indicates that the task is currently locked.

When you select a group that you want to configure, the Sterling Store Inventory Management Configurator tree expands to display all the available configuration rules for the selected group. Select a configuration that is not yet completed or still in progress. For certain configurations, you can tweak some of the tasks by clicking the Advanced Configuration hyperlink.

To view and change the configurations for a different enterprise organization, click the Load Configuration For Enterprise hyperlink. If the organization inherits a configuration from another organization, a hyperlink is displayed next to the configuration's name enabling the user to override the ownership of that configuration. If the organization has previously overridden the ownership, a hyperlink is displayed next to the configuration's name enabling the user to provide ownership back to the organization from where it was originally inheriting.

Understanding the IBM® Sterling Store Inventory Management Configurator Icons

The following table describes the icons used in the Sterling Store Inventory Management Configurator interface.

Table 2. Sterling Store Inventory Management Configurator Icons

Icons	Description
	**Search** - This icon is used to perform a search.
	**Create New**- This icon is used to create new adjustment reason codes.
	**Error Details** - This icon is used to view error details.
	**Purge Details** - This icon is used to purge details.
	**Save** - This icon is used to save the changes.
	**Save As** - This icon is used to create a new record from an existing record.
	**Modify** - This icon is used to edit details.
	**Delete** - This icon is used to delete records.
	**Allow** - This icon is used to allow order modification.
	**Disallow** - This icon is used to disallow order modification.
	**Ignore** - This icon is used to ignore order modification.

Access the Information Center

About this task

To access the Information Center, select Help > Help Contents.

Troubleshoot Errors

About this task

You can view the description and cause of any error raised in the Sterling Store Inventory Management Configurator, as well as the action to perform to resolve the error.

To view the error descriptions, perform the following steps:

Procedure

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

3. Click **Error Details** to view the cause of the error and the action to perform to troubleshoot the error.

Using Special Characters

In the Sterling Store Inventory Management Configurator, there may be instances where you need to use special characters during data entry. Sterling Selling and Fulfillment Foundation reserves key words and special characters that may be used internally. For information about using and handling special characters, refer to the *Sterling Selling and Fulfillment Foundation: Customization Basics*.

Chapter 4. Configuring Initial System Setup

You can use the Configure Initial System task to define the various configurations that are required during the initial installation of the application.

All configurations are owned by the Default organization.

Defining Quantity Units of Measure

You can define a master list of quantity units of measure that can be used when defining a unique item ID, unit of measure combinations, or alternate ordering units of measure.

For more information about defining quantity units of measure, see the *Sterling Selling and Fulfillment Foundation: Configuration Guide*.

Defining Service Quantity Units of Measure

You can define service quantity units of measure that can be used for service items.

For more information about defining service quantity units of measure, see the *Sterling Selling and Fulfillment Foundation: Configuration Guide*.

Defining Dimension Units of Measure

You can define standard units of measure for dimension to associate with your items. For example, for the centimeter unit of measure, you can define CM as your UOM code.

For more information about defining dimension units of measure, see the *Sterling Selling and Fulfillment Foundation: Configuration Guide*.

Defining Volume Units of Measure

You can define standard units of measure for volume to associate with your items. For example, for the gallon unit of measure, you can define the UOM code as GALLON and define the conversion factor.

For more information about defining Volume Units of Measure, see the *Sterling Selling and Fulfillment Foundation: Configuration Guide*.

Defining Weight Units of Measure

You can define standard units of measure for weight using this screen. For example, for the gram unit of measure, you can define the UOM code as GRAM, and also define the conversion factor.

For more information about defining Weight Units of Measure, see the *Sterling Selling and Fulfillment Foundation: Configuration Guide*.

Defining Time Units of Measure

You can define standard units of measure for Time to associate with your items. For example, for the day unit of measure, you can define the UOM code as DAY, and also define the conversion factor.

For more information about defining Time Units of Measure, see the *Sterling Selling and Fulfillment Foundation: Configuration Guide*.

Configuring Installation Rules

You can configure system level installation rules. You can set up the rules that need to be defined when the Hub installs the application.

For more information about defining installation rules, see the *Sterling Selling and Fulfillment Foundation: Configuration Guide*.

Defining Locales

You can set up locales, and associate them with multiple organizations and users within the Hub. Locales are only established by the Hub. A locale defines a set of standards that enable people within a geographic area to communicate and conduct business transactions in an unambiguous way.

For more information about defining locales, see the *Sterling Selling and Fulfillment Foundation: Configuration Guide*.

Defining Country or Region Codes

You can set up common codes for country or region when setting up locales. This common code identifies the country or region in which the locale is located.

For more information about defining country or region codes, see the *Sterling Selling and Fulfillment Foundation: Configuration Guide*.

Defining Language Codes

You can set up common codes for language definitions used when setting up locales. This common code identifies the language used in the locale. You can create, modify, and delete language definitions.

For more information about defining language codes, see the *Sterling Selling and Fulfillment Foundation: Configuration Guide*.

Defining Date Formats

You can set up common code formats for date formats used when setting up locales. This common code format identifies how dates are entered at a locale. You can create, modify, and delete date formats.

For more information about defining date formats, see the *Sterling Selling and Fulfillment Foundation: Configuration Guide*.

Defining Time Formats

You can set up common code formats for time formats used when setting up locales. This common code format identifies how times are entered at a locale. You can create, modify, and delete time formats.

For more information about defining time formats, see the *Sterling Selling and Fulfillment Foundation: Configuration Guide*.

Defining Date and Time Formats

You can set up common code formats for date and time formats used when setting up locales. This common code format identifies how dates with time are entered at a locale. You can create, modify, and delete date and time formats.

For more information about defining date and time formats, see the *Sterling Selling and Fulfillment Foundation: Configuration Guide*.

Defining Currencies

Currency Definitions define the symbols for each currency and indicate Euro currency membership and expiration date, if applicable. You can also set rules for an order's currency conversion and euro conversion.

The Euro currency is part of the plan to convert all of the European nations to one defined currency.

For more information about defining currency definitions, see the *Sterling Selling and Fulfillment Foundation: Configuration Guide*.

Defining Currency Conversions

Currency Conversion enables you to set up exchange rates from one currency to another.

Exchange rates are used to translate between currencies used by organizations as defined by their locale. The exchange rate is stored as part of the order document type when it is created. The stored exchange rate can be reassessed, based on fluctuating currency markets or any time the price of an order changes, such as when you cancel a line, add quantity, or add a charge.

For more information about defining currency conversions, see the *Sterling Selling and Fulfillment Foundation: Configuration Guide*.

Configuring Freight Terms

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

The following are the default freight terms:

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

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

For more information about defining freight terms, see the *Sterling Selling and Fulfillment Foundation: Logistics Management Configuration Guide*.

Chapter 5. Configuring an Enterprise Profile

Each Participant is considered an organization with a defined role. For an organization to function as desired it must be given one or more roles. Each organization is assigned at least one role. A **role** is a well-defined set of activities that can be performed by an organization. Each organization performs at least one role such as hub, enterprise, and so forth.

Note: The organization code of the organization administering the enterprise and the organization code of the primary enterprise must be the same.

For more information about configuring participants, see the *Sterling Selling and Fulfillment Foundation: Configuration Guide*.

Chapter 6. Managing the Supply Chain Network Model

You can view the details of the participants in the supply chain model. The usual participants are distribution centers, vendors, and delivery nodes.

Setting Up a Participant Model

You can configure locations in a node from where you can ship or deliver products.

For more information about configuring participants, see the *Sterling Selling and Fulfillment Foundation: Configuration Guide*.

Configuring Region Definitions

Region Definitions enable you to configure region levels, match region preferences, or define a region schema. The individual components consisting of regions and region levels can be used to create the region schema.

Configuring Region Levels

You can define region levels such as Country or Region, State, City, and so forth, based on the levels at which you want to aggregate your regions, and define the address field to which a region level corresponds. Region levels also enables you to create a region hierarchy.

For more information about defining region levels, see the *Sterling Selling and Fulfillment Foundation: Configuration Guide*.

Defining Region Match Preferences

Region match preferences enables you to specify the level at which addresses should be matched to regions for each country or region.

For more information about defining region match preferences, see the *Sterling Selling and Fulfillment Foundation: Configuration Guide*.

Configuring a Region Schema

A region schema is the complete hierarchical set of regions that define a given geography. A region is configured as a specific territory. For example, you can create a region for a complete state, city, or town.

For more information about defining region schema, see the *Sterling Selling and Fulfillment Foundation: Configuration Guide*.

Chapter 7. Managing Products and Categories

You can define products and various attributes of the product items. You can also categorize the items to group them into logical sub sets.

Configuring Units of Measure

You can define quantity units of measure and pricing units of measure. These units of measure can be used when defining a unique item ID and unit of measure combinations and alternate ordering units of measure.

For more information about configuring units of measure, see the *Sterling Selling and Fulfillment Foundation: Configuration Guide*.

Managing Products

When managing products you create product items, define the general information about the product, and define various other attributes for an item.

For more information about defining product items, see the *Sterling Selling and Fulfillment Foundation: Catalog Management Configuration Guide*.

Defining Product Categories

You can categorize or group product items into logical sub sets. This enables you to search for an item based on the category to which it belongs.

For more information about defining a product category, see the *Sterling Selling and Fulfillment Foundation: Catalog Management Configuration Guide*.

Defining Types of Product Classification

Products can be classified into various groups which can be used for sourcing, determining shipping preferences, and so forth.

You can create a classification and associate an item attribute with it.

For more information about defining product classification, see the *Sterling Selling and Fulfillment Foundation: Catalog Management Configuration Guide*.

Defining Classification Values

This configuration allows you to define various values for a given classification type. A classification is always associated with an attribute in the item master.

For more information about defining the product classification hierarchy, see the *Sterling Selling and Fulfillment Foundation: Catalog Management Configuration Guide*.

Defining Alternate Identifications for Item

There are different ways to identify an item. You can define common codes such as UPC and EAN for item alias types when configuring product items, provided services, and delivery services.

For more information about defining item alias types, see the *Sterling Selling and Fulfillment Foundation: Catalog Management Configuration Guide*.

Chapter 8. Configuring Inbound Processes

You can configure inbound processes such as carriers, receiving preferences, and so forth.

Defining Carriers

By choosing the role of an organization as carrier, you can define the various attributes of the carrier. The various services provided by a carrier are truck load services, less than truck load services, and parcel services.

For more information about defining carriers, see the *Sterling Selling and Fulfillment Foundation: Configuration Guide*.

Defining Carrier Services

You can configure different codes to identify different carrier services used to ship orders.

For more information about defining carrier services, see the *Sterling Selling and Fulfillment Foundation: Logistics Management Configuration Guide*.

Defining Shipment Modes

You can define common codes used for a shipment mode. The shipment mode describes how a shipment is being shipped.

The following are the default shipment modes:

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

For more information about defining shipment modes, see the *Sterling Selling and Fulfillment Foundation: Supply Collaboration Configuration Guide*.

Configuring Purchase Order

Configuring Purchase Order Receipt

You can determine the pipeline used for the purchase order receipt repository using the pipeline determination rules.

You can also create a pipeline for the purchase order receipt repository. To create a pipeline you can use the applicable transactions and conditions in the work area.

For more information about pipeline configuration, see the *Sterling Selling and Fulfillment Foundation: Configuration Guide*.

Configuring Purchase Order Receiving 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. Sterling Selling and Fulfillment Foundation supports modifications through the Console and APIs. It is critical for you to decide which modifications are allowed for each modification type, modification level, and status combination.

Important: Contemplate business and system integration implications before allowing a modification that is disallowed as part of the system defaults. For example, adding instructions to a purchase order document type is disallowed after the release has been sent to the node.

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

Set Up Receipt Modification Rules for Purchase Order

About this task

To set up receipt modification rules:

Procedure

1. From the tree in the application rules side panel, choose Receiving > Document Specific > Purchase Order > Receipt Modification Rules. The Modification Rules window displays.
2. In the Modification Rules window, select the Purchase Order Receipt whose Modification Rule is to be set.
3. Click the Allow icon to allow order modification.
4. Click the Disallow icon to disallow order modification.
5. Click the Ignore icon to ignore order modification.

Results

For more information about defining modification rules, see the *Sterling Selling and Fulfillment Foundation: Distributed Order Management Configuration Guide*.

Description of Modification Rules Window

Table 3. Modification Rules Window

Field	Description
Primary Info	
Group by	View the Purchase Order Receipt Modification Rules grouped by Modification Type, Modification Level, or by Status.
Modification Type	**Purchase Order Receipt Modification Rules grouped by Modification Type. Statuses display grouped by Modification Level for each Modification Type.**
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.

Table 3. Modification Rules Window (continued)

Field	Description
Modification Level	**Purchase Order Receipt Modification Rules grouped by Modification Level. Statuses display grouped by Modification Type for each Modification Level.**
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	**Purchase Order Receipt Modification Rules grouped by Status. Modification Types display grouped by Modification Level for each Status.**

For more information about defining or changing Modification Rules, see the *Sterling Selling and Fulfillment Foundation: Distributed Order Management Configuration Guide*.

Defining Receipt Process Type Details for Purchase Order

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

Sterling Selling and Fulfillment Foundation provides a base repository for each of the system-defined process types. Some of the entities within a repository are copied when creating a new document type. For more information about creating a new document type, see the *Sterling Selling and Fulfillment Foundation: Configuration Guide*.

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

View the Purchase Order Receipt Pipeline Details

About this task

For more information about Pipelines, see the *Sterling Selling and Fulfillment Foundation: Configuration Guide*.

To view the purchase order receipt pipeline details:

Procedure

1. From the tree in the application rules side panel, choose Receiving > Document Specific > Purchase Order > Receipt Process Model. The Purchase Order Receipt window displays.
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 displays.

Results

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

Description of Process Type Details Window

Table 4. Process Type Details Window

Field	Description
Primary Info	
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.

Defining Receipt Process Model for Purchase Order

The process of receiving is modeled through a pipeline. This represents the process configuration that is unique to a store. A store may also specify unique processes for each participating enterprise.

For example, a store that performs re-packaging (VAS) for certain items in the store or a store that always palletizes all receipts before putaway to storage area.

Pipeline Determination for Purchase Order: 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 the *Sterling Selling and Fulfillment Foundation: Configuration Guide*.

Hub Rule for Purchase Order: When you expand the Pipeline Determination branch, the components display depends on what role you are logged in as. If you are logged in as a Hub role, the Hub Rule displays. If you are logged in as an Enterprise role, both the Hub Rule and all user created determination rules (For example, My Rule) components display. Double-click on the 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, 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.

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 the *Sterling Selling and Fulfillment Foundation: Configuration Guide*.

View the Purchase Order Receipt Pipeline Details:
About this task

For more information about Pipelines, see the *Sterling Selling and Fulfillment Foundation: Configuration Guide*.

To view the purchase order receipt pipeline details:

Procedure

1. From the tree in the application rules side panel, choose Receiving > Document Specific > Purchase Order > Receipt Process Model. The Purchase Order Receipt window displays.

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 displays.

Results

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

View the Transaction Details for a Purchase Order Receipt Pipeline:
About this task

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

For more information about Transactions, see the *Sterling Selling and Fulfillment Foundation: Configuration Guide*.

To view the transaction details for a purchase order receipt pipeline:

Procedure

1. From the tree in the application rules side panel, choose Receiving > Document Specific > Purchase Order > Receipt Process Model. The Purchase Order Receipt window displays.
2. In the Purchase Order Receipt window, choose the **Transactions** icon.
3. The Transactions tab window displays.

Results

For more information about creating and modifying Transactions, see the *Sterling Selling and Fulfillment Foundation: Configuration Guide*.

Description of Purchase Order Receipt Pipeline - Transactions Tab Window:

Table 5. 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	This transaction represents the closure of pre-receipts for a shipment. Pre-receipt allows a store 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.

Table 5. Purchase Order Receipt Pipeline - Transactions Tab Window (continued)

Field	Description
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 store.
Purge Receipt	This transaction represents a receipt that may be purged (moved out of) from primary transactional tables to the history tables. For more information about the receipt purge transaction, see the *Sterling Selling and Fulfillment Foundation: Supply Collaboration Configuration Guide*.
Purge Receipt History	This transaction represents a receipt that may now be purged (moved out of) from the history tables. For more information about the receipt history purge transaction, see the *Sterling Selling and Fulfillment Foundation: Supply Collaboration Configuration Guide*.
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 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.

View the Status Details of a Purchase Order Receipt Pipeline:
About this task

Statuses are the actual states that a document moves through in the pipeline. A transaction can contain two types of statuses, a drop status and a pickup status. A document is moved into a **drop status** when the events and conditions of a transaction have been completed. A **pickup status** takes the document from the previous drop status and moves it through the next transaction. Created and Scheduled are examples of statuses.

For more information about Statuses, see the *Sterling Selling and Fulfillment Foundation: Configuration Guide*.

To view the status details of a purchase order receipt pipeline:

Procedure

1. From the tree in the application rules side panel, choose Receiving > Document Specific > Purchase Order > Receipt Process Model. The Purchase Order Receipt window displays.
2. In the Purchase Order Receipt window, choose the **Statuses** icon.

3. The Statuses tab window displays.

Results

For more information about creating and modifying Statuses, see the *Sterling Selling and Fulfillment Foundation: Configuration Guide*.

Description of Purchase Order Receipt Pipeline - Statuses Tab Window:

Table 6. 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.
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.

View the Condition Details of a Purchase Order Receipt Pipeline:
About this task

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 Sterling Selling and Fulfillment Foundation. You can use these attributes in any combination or you can create conditions that run the appropriate application logic for specific circumstances.

For more information about Conditions, see the *Sterling Selling and Fulfillment Foundation: Configuration Guide*.

To view the condition details of a purchase order receipt pipeline:

Procedure

1. From the tree in the application rules side panel, choose Receiving > Document Specific > Purchase Order > Receipt Process Model. The Purchase Order Receipt window displays.
2. In the Purchase Order Receipt window, choose the **Conditions** icon.
3. The Conditions tab window displays.

Results

For more information about creating and modifying Conditions, see the *Sterling Selling and Fulfillment Foundation: Configuration Guide*.

Table 7. Purchase Order Receipt Pipeline - Conditions Tab Window

Field	Description
Conditions	Displays conditions that are specific to the purchase order receipt pipeline, if any.

The default pipeline does not have any conditions specified.

View the Action Details of a Purchase Order Receipt Pipeline:
About this task

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

For example, when an order is released (the event), you can set an action to send the customer an e-mail.

For more information about Actions, see the *Sterling Selling and Fulfillment Foundation: Configuration Guide*.

To view the action details of a purchase order receipt pipeline:

Procedure

1. From the tree in the application rules side panel, choose Receiving > Document Specific > Purchase Order > Receipt Process Model. The Purchase Order Receipt window displays.
2. In the Purchase Order Receipt window, choose the **Actions** icon.
3. The Actions tab window displays.

Results

For more information about creating and modifying Actions, see the *Sterling Selling and Fulfillment Foundation: Configuration Guide*.

Description of Layout Definition - Actions Tab Window:

Table 8. Layout Definition - Actions Tab Window

Field	Description
Batching	Default settings are provided for: **Print Move Tickets** – Invokes the batch printing service for printing the move tickets. **Print Task Sheets** – Invokes the batch print service for printing the task sheets.
ChangeLocnAttributes	Default settings are provided for: **ChangeLocationAttributes** – Initiates the change location capacity updates if item dimensions or location dimensions change.
ConfirmShipment	Default settings are provided for: **ConfirmShipment** – Invokes the confirmShipment flow to confirm the shipment.

Table 8. Layout Definition - Actions Tab Window (continued)

Field	Description
DCS-Integration	Default settings are provided for: **InventoryDownload** – Invokes the YantraWMSInventoryDownloadService service to download the inventory information from the Sterling Selling and Fulfillment Foundation to DCS. **PODownload** – Invokes the YantraWMSPODownloadService service to download the Purchase Order information from the Sterling Selling and Fulfillment Foundation to DCS.
Exceptions	Default settings are provided for: **ShortagesDetected** – Invokes the LogWavePlaFailure exception service when shortage of inventory occurs during wave release.
InventorySynchronization	Default settings are provided for: **CollectInventoryMismatch** – This service collects the inventory mismatch information between an external system and the Sterling Selling and Fulfillment Foundation. This is typically caused when some inventory updates at a node or a store are not reported to the Sterling Selling and Fulfillment Foundation. **UploadInventoryChange** - This service reads the message from the JMS queue and invokes the adjustInventory API.
PickAndRetrieval	Default settings are provided for: **ConfirmEmptyLocationAfterPick** – Invokes the GenerateCountRequest flow which creates a count request.
Prints	Default settings are provided for: **PickList Print** – Invokes the print service for printing the Pick List. **LTL Manifest** – Invokes the print service for printing the Less-than Truck Load Manifest. **Print Load BOL** – Invokes the print service for printing the Load Bill of Lading. **Print PackList** – Invokes the print service for printing the Pack List. **Print Post Pick Container Labels** – Invokes the print service for printing UCC-128 container labels for containers, when system defined packing process is used. **Print Shipment BOL** – Invokes the print service for printing the Shipment Bill of Lading. **Print Shipping Label** – Invokes the print service for printing the UCC-128 container labels. **Print Wave** – Invokes the Print service for printing a Wave.

Table 8. Layout Definition - Actions Tab Window (continued)

Field	Description
ReceiptPutaway	**Putaway products on receipt closure** – Indicates the default action provided to automatically initiate putaway of purchase order receipts. **Note:** Receipt and putaway of loose inventory for a serial tracked item is not supported. Receipt and putaway of serial inventory is supported only if the inventory is received on cases or pallets, and the system does a putaway of the entire case or pallet containing the serials.
ReceiptUpload	**UploadCaseReceipt** - Reads the message from JMS queue and invokes the receiveOrder API.
RetrieveShipment	**Retrieve Requested Serial** – This service invokes the retrieveShipment API to retrieve the requested serials to the specified location.
Shipping	Default settings are provided for: **Load Left Origin** – Invokes the doLoadLeftOriginUpdates service to mark that the load has left the origin. **Stop Shipping** – Invokes the RaiseStopShippingAlert service to raise an alert to stop the processing of the shipment.
Templates	Default settings are provided for: **Log Exception** – Logs the reasons due to which a count request could not be created for a Count Program. **Publish Data** – Sends data to external queue or internal tables. **Raise Exception** – Raises an alert using Event Management from the published information. **Route Shipment Exception** – Raises an exception if a Scac is not found for an outbound shipment. **Send Email** – Raises an email action to create an email in the template format from the published information. **Send Email-HTML format** – Raises an email action to create an email in HTML format from the published information.

Note: These actions are provided only for DEFAULT enterprises.

View the Service Definition Details of a Purchase Order Receipt Pipeline: About this task

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 *Sterling Selling and Fulfillment Foundation: Configuration Guide*.

To view the service definition details of a purchase order receipt pipeline:

Procedure

1. From the tree in the application rules side panel, choose Receiving > Document Specific > Purchase Order > Receipt Process Model. The Purchase Order Receipt window displays.
2. In the Purchase Order Receipt window, choose the **Service Definitions** icon.
3. The Service Definitions tab window displays.

Results

For more information about creating and modifying Service Definitions, see the *Sterling Selling and Fulfillment Foundation: Configuration Guide*.

Description of Purchase Order Receipt Pipeline:

Table 9. Purchase Order Receipt Pipeline - Service Definition Tab Window

Field	Description
Default Group	Displays flows that are specific to the returns receipt pipeline.

The default pipeline does not have any conditions specified.

Configuring Purchase Order Receiving Dispositions

Create a Receiving Disposition for Purchase Order

About this task

To create a receiving disposition:

Procedure

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 displays.
3. In the Receiving Disposition : Purchase Order window, choose the **Create New** icon. The Disposition Details pop-up window displays.
4. Enter information in the applicable fields.
5. Choose the **Save** icon.

Description of Disposition Details Pop-up Window:

Table 10. 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 10. Disposition Details Pop-up Window (continued)

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	**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.

Create a New Receiving Disposition From an Existing Receiving Disposition for Purchase Order

About this task

To create a new receiving disposition from an existing receiving disposition:

Procedure

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 displays with the list of Receiving Dispositions.
3. Choose the Receiving Disposition to be copied from. Choose the **Create New** icon. The Disposition Details pop-up window displays.
4. Enter information in the applicable fields.
5. Choose the **Save** icon.

Description of Disposition Details Pop-up Window:

Table 11. 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.
Disposition Transitions	**This displays the existing Receiving Disposition codes that are available for associating a transition with the Receiving Disposition being created or modified.**

Table 11. Disposition Details Pop-up Window (continued)

Field	Description
Receiving Disposition	Existing Receiving Disposition Code available for transition association.

Modify a Receiving Disposition for Purchase Order

About this task

Once a Receiving Disposition has been created, it may be modified.

To modify a receiving disposition:

Procedure

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 displays with the list of Receiving Dispositions.
3. Select the Receiving Disposition to be modified. Choose the **Details** icon. The Disposition Details pop-up window displays.
4. Enter information in the applicable fields.
5. Choose the **Save** icon.

Description of Disposition Details Pop-up Window:

Table 12. 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.
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.

Delete a Receiving Disposition for Purchase Order

About this task

To delete a receiving disposition:

Procedure

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 displays with the list of Receiving Dispositions.
3. Select the Receiving Disposition to be deleted.
4. Choose the **Delete** icon.

Configuring Purchase Order Receiving Discrepancy Reasons

You can define codes to specify reasons for any discrepancies that may occur during the receipt of a shipment.

For more information about defining receiving discrepancy reasons, see the *Sterling Selling and Fulfillment Foundation: Supply Collaboration Configuration Guide*.

Configuring Purchase Order Receiving Preferences

Receiving preferences can be created to enable over receipt of products in the system. Over receipt is the ability to receive more than the ordered quantity.

For more information about defining receiving preferences, see the *Sterling Selling and Fulfillment Foundation: Supply Collaboration Configuration Guide*.

Configuring Transfer Order

A transfer order in Sterling Store Inventory Management indicates transfers between the network of stores. 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.

This topic describes how to configure receiving processes for a transfer order in store.

Configuring Transfer Order Receipt

You can determine the pipeline for the transfer order receipt repository using pipeline determination. When you expand the Pipeline Determination branch, the components that are displayed depends on what role you have 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 My Rule components are displayed. Drag conditions and pipelines into the work area to construct the pipeline determination rules.

For more information about pipeline configuration, see the *Sterling Selling and Fulfillment Foundation: Configuration Guide*.

Configuring Transfer Order Receiving 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. Sterling Selling and Fulfillment Foundation supports modifications through the Console and APIs. It is critical for you to decide which modifications are allowed for each modification type, modification level, and status combination.

Important: Contemplate business and system integration implications before allowing a modification that is disallowed as part of the system defaults.

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

Set Up Transfer Order Receiving Rules

About this task

To set up receipt modification rules:

Procedure

1. From the tree in the application rules side panel, choose Receiving > Document Specific > Transfer Order > Receipt Modification Rules. The Modification Rules window displays.
2. In the Modification Rules window, select the Transfer Order Receipt whose Modification Rule is to be set.
3. Click the Allow icon to allow order modification.
4. Click the Disallow icon to disallow order modification.
5. Click the Ignore icon to ignore order modification.

Results

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

Description of Transfer Order Receiving Rules:

The following table describes the modification rules for transfer order:

Table 13. Modification Rules for Transfer Order

Field	Description
Group by	View the Transfer Order Receipt Modification Rules grouped by Modification Type, Modification Level, or by Status.
Modification Type	Transfer Order Receipt Modification Rules grouped by Modification Type. Statuses display grouped by Modification Level for each Modification Type.
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	Transfer Order Modification Rules grouped by Modification Level. Statuses display grouped by Modification Type for each Modification Level.

Table 13. Modification Rules for Transfer Order (continued)

Field	Description
Receipt	Allow or Disallow or Ignore modification types at receipt level appropriately.
Status	Transfer Order Receipt Modification Rules grouped by Status. Modification Types display grouped by Modification Level for each Status.

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

Defining Receipt Process Type Details for Transfer Order

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

Sterling Selling and Fulfillment Foundation provides a base repository for each of the system-defined process types. Some of the entities within a repository are copied when creating a new document type. For more information about creating a new document type, see the *Sterling Selling and Fulfillment Foundation: Configuration Guide*.

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

View Receipt Process Type Details:
About this task

To view transfer order receipt process type details:

Procedure

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 displays.

2. Primary information of the Process Type displays in the applicable fields.

Results

For more information about defining the primary information for process type details, see the *Sterling Selling and Fulfillment Foundation: Configuration Guide*.

Description of Process Type Details Window:

Table 14. Process Type Details Window

Field	Description
Primary Info	
Process Type	This is automatically populated by the system as "TO_RECEIPT".
Process Type Name	This indicates the name of the process type.
Description	This provides a brief description for the process type.

Defining Receipt Process Model for Transfer Order

The process of receiving is modeled through a pipeline. This represents the process configuration that is unique to a store. A store may also specify unique processes for each participating enterprise.

For example, a store that performs re-packaging (VAS) for certain items in the store or a store that always palletizes all receipts before putaway to storage area.

Pipeline Determination for Transfer Order: 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 the *Sterling Selling and Fulfillment Foundation: Configuration Guide*.

Hub Rule for Transfer Order: When you expand the Pipeline Determination branch, the components display depends on what role you are logged in as. If you are logged in as a Hub role, the Hub Rule displays. If you are logged in as an Enterprise role, both the Hub Rule and all user created determination rules (For example, My Rule) components display. Double-click on the 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, 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.

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 the *Sterling Selling and Fulfillment Foundation: Configuration Guide*.

View the Transfer Order Receipt Pipeline Details:
About this task

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

To view the transfer order receipt pipeline details:

Procedure

1. From the tree in the application rules side panel, choose Receiving > Document Specific > Transfer Order > Receipt Process Model. The Transfer Order Receipt window displays.
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 displays.

Results

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

View the Transaction Details for a Transfer Order Receipt Pipeline:

About this task

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 Sterling Selling and Fulfillment Foundation. Base transactions are predefined transactions that contain information about how the transaction behaves, such as how many copies of a transaction can be kept in a process type and whether or not it can have configurable base pick and drop statuses. Base transactions can be used to create new transactions. These transactions can be changed within the limits defined in the base transaction.

For more information about Transactions, see the *Sterling Selling and Fulfillment Foundation: Configuration Guide*.

To view the transaction details for a transfer order receipt pipeline:

Procedure

1. From the tree in the application rules side panel, choose Receiving > Document Specific > Transfer Order > Receipt Process Model. The Transfer Order Receipt window displays.
2. In the Transfer Order Receipt window, choose the **Transactions** icon.
3. The Transactions tab window displays.

Results

For more information about creating and modifying transactions, see the *Sterling Selling and Fulfillment Foundation: Configuration Guide*.

Description of Transfer Order Receipt Pipeline - Transactions Tab Window:

Table 15. 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	This transaction represents the closure of pre-receipts for a shipment. Pre-receipt allows a store 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.
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 store.
Purge Receipt	This transaction represents a shipment that may be purged (moved out of) from primary transactional tables to the history tables.
Purge Receipt History	This transaction represents a shipment may now be purged (moved out of) from the history tables.

Table 15. Transfer Order Receipt Pipeline - Transactions Tab Window (continued)

Field	Description
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.

View the Status Details of a Transfer Order Receipt Pipeline:
About this task

Statuses are the actual states that a document moves through in the pipeline. A transaction can contain two types of statuses, a drop status and a pickup status. A document is moved into a **drop status** when the events and conditions of a transaction have been completed. A **pickup status** takes the document from the previous drop status and moves it through the next transaction. Created and Scheduled are examples of statuses.

For more information about Statuses, see the *Sterling Selling and Fulfillment Foundation: Configuration Guide*.

To view the status details of a transfer order receipt pipeline:

Procedure

1. From the tree in the application rules side panel, choose Receiving > Document Specific > Transfer Order > Receipt Process Model. The Transfer Order Receipt window displays.
2. In the Transfer Order Receipt window, choose the **Statuses** icon.
3. The Statuses tab window displays.

Results

For more information about creating and modifying statuses, see the *Sterling Selling and Fulfillment Foundation: Configuration Guide*.

Description of Transfer Order Receipt Pipeline - Statuses Tab Window:

Table 16. 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.
Pre Received	This indicates that pre-receipt process for the shipment is completed. This corresponds to 'Close-PreReceipt' transaction.

Table 16. Transfer Order Receipt Pipeline - Statuses Tab Window (continued)

Field	Description
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.

View the Condition Details of a Transfer Order Receipt Pipeline:
About this task

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 Sterling Selling and Fulfillment Foundation. You can use these attributes in any combination or you can create conditions that run the appropriate application logic for specific circumstances.

For more information about Conditions, see the *Sterling Selling and Fulfillment Foundation: Configuration Guide*.

To view the condition details of a transfer order receipt pipeline:

Procedure

1. From the tree in the application rules side panel, choose Receiving > Document Specific > Transfer Order > Receipt Process Model. The Transfer Order Receipt window displays.
2. In the Transfer Order Receipt window, choose the **Conditions** icon.
3. The Conditions tab window displays.

Results

For more information about creating and modifying conditions, see the *Sterling Selling and Fulfillment Foundation: Configuration Guide*.

Description of Transfer Order Receipt Pipeline - Conditions Tab Window:

Table 17. Transfer Order Receipt Pipeline - Conditions Tab Window

Field	Description
Conditions	Displays conditions that are specific to the transfer order receipt pipeline, if any.

The default pipeline does not have any conditions specified.

View the Action Details of a Transfer Order Receipt Pipeline:
About this task

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

For example, when an order is released (the event), you can set an action to send the customer an e-mail.

For more information about Actions, see the *Sterling Selling and Fulfillment Foundation: Configuration Guide*.

To view the action details of a transfer order receipt pipeline:

Procedure

1. From the tree in the application rules side panel, choose Receiving > Document Specific > Transfer Order > Receipt Process Model. The Transfer Order Receipt window displays.
2. In the Transfer Order Receipt window, choose the **Actions** icon.
3. The Actions tab window displays.

Results

For more information about creating and modifying actions, see the *Sterling Selling and Fulfillment Foundation: Configuration Guide*.

Description of Transfer Order Receipt Pipeline - Actions Tab Window:

Table 18. Transfer Order Receipt Pipeline - Actions Tab Window

Field	Description
Batching	Default settings are provided for: **Print Move Tickets** – Invokes the batch printing service for printing the move tickets. **Print Task Sheets** – Invokes the batch print service for printing the task sheets.
ChangeLocnAttributes	
ConfirmShipment	Default settings are provided for: **ConfirmShipment** – Invokes the confirmShipment flow to confirm the shipment.
DCS-Integration	Default settings are provided for: **InventoryDownload** – Invokes the YantraWMSInventoryDownloadService service to download the inventory information from Sterling Selling and Fulfillment Foundation to DCS. **PODownload** – Invokes the YantraWMSPODownloadService service to download the Purchase Order information from Sterling Selling and Fulfillment Foundation to DCS.
Exceptions	Default settings are provided for: **ShortagesDetected** – Invokes the LogWavePlaFailure exception service when shortage of inventory occurs during wave release.
InventorySynchronization	Default settings are provided for: **CollectInventoryMismatch** – This service collects the inventory mismatch information between an external system and Sterling Selling and Fulfillment Foundation. This is typically caused when some inventory updates at a node or a store are not reported to Sterling Selling and Fulfillment Foundation.

Table 18. Transfer Order Receipt Pipeline - Actions Tab Window (continued)

Field	Description
PickAndRetrieval	Default settings are provided for: **ConfirmEmptyLocationAfterPick** – Invokes the GenerateCountRequest flow which creates a count request.
Prints	Default settings are provided for: **PickList Print** – Invokes the print service for printing the Pick List. **LTL Manifest** – Invokes the print service for printing the Less-than Truck Load Manifest. **Print Load BOL** – Invokes the print service for printing the Load Bill of Lading. **Print PackList** – Invokes the print service for printing the Pack List. **Print Post Pick Container Labels** – Invokes the print service for printing UCC-128 container labels for containers, when system defined packing process is used. **Print Shipment BOL** – Invokes the print service for printing the Shipment Bill of Lading. **Print Shipping Label** – Invokes the print service for printing the UCC-128 container labels. **Print Wave** – Invokes the Print service for printing a Wave.
ReceiptPutaway	**Putaway products on receipt closure** – Indicates the default action provided to automatically initiate putaway of purchase order receipts. **Note:** Receipt and putaway of loose inventory for a serial tracked item is not supported. Receipt and putaway of serial inventory is supported only if the inventory is received on cases or pallets, and the system does a putaway of the entire case or pallet containing the serials.
RetrieveShipment	**Retrieve Requested Serial** – This service invokes the retrieveShipment API to retrieve the requested serials to the specified location.
Shipping	Default settings are provided for: **Load Left Origin** – Invokes the doLoadLeftOriginUpdates service to mark that the load has left the origin. **Stop Shipping** – Invokes the RaiseStopShippingAlert service to raise an alert to stop the processing of the shipment.

Table 18. Transfer Order Receipt Pipeline - Actions Tab Window (continued)

Field	Description
Templates	Default settings are provided for: **Log Exception** – Logs the reasons due to which a count request could not be created for a Count Program. **Publish Data** – Sends data to external queue or internal tables. **Raise Exception** – Raises an alert using Event Management from the published information. **Send Email** – Raises an email action to create an email in the template format from the published information. **Send Email-HTML format** – Raises an email action to create an email in HTML format from the published information.

View the Service Definition Details of a Transfer Order Receipt Pipeline: About this task

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 *Sterling Selling and Fulfillment Foundation: Configuration Guide*.

To view the service definition details of a transfer order receipt pipeline:

Procedure

1. From the tree in the application rules side panel, choose Receiving > Document Specific > Transfer Order > Receipt Process Model. The Transfer Order Receipt window displays.
2. In the Transfer Order Receipt window, choose the **Service Definitions** icon.
3. The Service Definitions tab window displays.

Results

For more information about creating and modifying Service Definitions, see the *Sterling Selling and Fulfillment Foundation: Configuration Guide*.

Description of Transfer Order Receipt Pipeline - Service Definition Tab Window:

Table 19. Transfer Order Receipt Pipeline - Service Definition Tab Window

Field	Description
Default Group	Displays flows that are specific to the transfer order receipt pipeline.

The default pipeline does not have any conditions specified.

Defining Receiving Disposition for Transfer Order

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.

Create a Receiving Disposition for Transfer Order

About this task

To create a receiving disposition:

Procedure

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 displays.
3. In the Receiving Disposition : Transfer Order window, choose the **Create New** icon. The Disposition Details pop-up window displays.
4. Enter information in the applicable fields.
5. Choose the **Save** icon.

Description of Disposition Details Pop-up Window:

Table 20. 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.
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.

Create a New Receiving Disposition From an Existing Receiving Disposition for Transfer Order

About this task

To create a new receiving disposition from an existing receiving disposition:

Procedure

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 displays with the list of Receiving Dispositions.
3. Choose the Receiving Disposition to be copied from. Choose the **Save As...** icon. The Disposition Details pop-up window displays.
4. Enter information in the applicable fields.
5. Choose the **Save** icon.

Description of Disposition Details Pop-up Window:

Table 21. 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.
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.

Modify a Receiving Disposition for Transfer Order

About this task

Once a Receiving Disposition has been created, it may be modified.

To modify a receiving disposition:

Procedure

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 displays with the list of Receiving Dispositions.
3. Select the Receiving Disposition to be modified. Choose the **Details** icon. The Disposition Details pop-up window displays.
4. Enter information in the applicable fields.
5. Choose the **Save** icon.

Description of Disposition Details Pop-up Window:

Table 22. 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.
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.

Delete a Receiving Disposition for Transfer Order

About this task

To delete a receiving disposition:

Procedure

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 displays with the list of Receiving Dispositions.
3. Select the Receiving Disposition to be deleted.
4. Choose the **Delete** icon.

Configuring Transfer Order Receiving Discrepancy Reasons

You can define codes to specify reasons for any discrepancies that may occur during a receipt of a shipment. You can create receiving discrepancy reasons.

For more information about defining receiving discrepancy reasons, see the *Sterling Selling and Fulfillment Foundation: Supply Collaboration Configuration Guide*.

Configuring Transfer Order Receiving Preferences

Receipt preferences can be created to enable over receipt of products in the system. Over receipt is the ability to receive more than an ordered quantity.

For more information about defining receipt preferences, see the *Sterling Selling and Fulfillment Foundation: Supply Collaboration Configuration Guide*.

Configuring Transactions and Events for Inventory, Item, and User Interfaces

Every process type has a set of base transactions defined for it. A transaction is a logical unit of work that is necessary for performing an activity. 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.

For more information about configuring transactions and events for inventory, item, and UI, see the *Sterling Selling and Fulfillment Foundation: Configuration Guide*.

Defining Vendors

Defining Vendor Classification

You can configure the vendor classification codes used to associate with a vendor identification master.

Create a Vendor Classification

About this task

To create a vendor classification:

Procedure

1. From the tree in the application rules side panel, choose Receiving > Vendor > Vendor Classification. The Vendor Classification Codes window displays in the work area.
2. From the tree in the application rules side panel, choose Receiving > Vendor > Vendor Classification. The Vendor Classification Codes window displays in the work area.
3. Choose the **Create New** icon. The Vendor Classification Code Details pop-up window displays.
4. In Vendor Classification Code, enter the classification ID code.
5. In Short Description, enter a brief description of the classification ID code.
6. In Long Description, enter a more detailed description of the classification ID code.
7. Choose the **Save** icon.

Modify a Vendor Classification

About this task

To modify a vendor classification:

Procedure

1. From the tree in the application rules side panel, choose Receiving > Vendor > Vendor Classification. The Vendor Classification Codes window displays in the work area.
2. Select the applicable vendor classification code and choose the **Details** icon. The Vendor Classification Code Details pop-up window displays.
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 the **Save** icon.

Delete a Vendor Classification
About this task

To delete a vendor classification:

Procedure

1. From the tree in the application rules side panel, choose Receiving > Vendor > Vendor Classification. The Vendor Classification Codes window displays in the work area.
2. Select the applicable vendor classification code and choose the **Delete** icon.

Defining Vendor Definition

You can configure vendor definitions 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 Sterling Selling and Fulfillment Foundation.

Create a Vendor Definition
About this task

To create a vendor definition:

Procedure

1. From the tree in the application rules side panel, choose Receiving > Vendor > Vendor Definition. The Vendor Search window displays in the work area.
2. Choose the **Create New** icon. The Vendor pop-up window displays.
3. Enter information into the applicable fields.
4. Choose the **Save** icon.

Description of Vendor Pop-up Window:

Table 23. Vendor Pop-Up Window

Field	Description
Vendor ID	Enter the identifier of the vendor.
Vendor Classification	Select the classification, if applicable.
Select An Existing Organization	Choose this option and select the applicable Seller if you want to associate the vendor with an existing Seller organization.
Create A New Organization	Choose this option if you want to create a new organization to associate with the vendor.
Organization Code	Enter the organization code.
Organization Name	Enter the name of the organization.
This Organization Is Also A Ship Node	Select this if the new organization is also a ship node.
DUNS Number	Enter the DUNS number of the seller.

Table 23. Vendor Pop-Up Window (continued)

Field	Description
Account Number With Hub	Enter the account number of the seller assigned by Hub organization.
Locale	Select the locale of the seller.
Sends Functional Acknowledgment	Check this box if the supplier sends a functional acknowledgment for a PO.
Functional Acknowledgment Time	Enter the number of days the supplier took to send the functional acknowledgment for a PO.
Sends Commitment	Check this box if the supplier sends a commitment for a PO.
Commitment Time	Enter the number of days the supplier took to send the commitment for a PO.
Send ASN	Check this box if the supplier sends an Advanced Shipment Notice (ASN) for a PO.

Modify a Vendor Definition

About this task

To modify a vendor definition:

Procedure

1. From the tree in the application rules side panel, choose Receiving > Vendor > Vendor Definition. The Vendor Search window displays in the work area.
2. Enter applicable search criteria and choose the **Search** icon. A list of vendors displays.
3. Locate the applicable vendor and choose the **Details** icon. The Vendor pop-up window displays.
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 the **Save** icon.

Delete a Vendor Definition

About this task

To delete a vendor definition:

Procedure

1. From the tree in the application rules side panel, choose Receiving > Vendor > Vendor Definition. The Vendor Search window displays in the work area.
2. Enter applicable search criteria and choose the **Search** icon. A list of vendors displays.
3. Locate the applicable vendor and choose the **Delete** icon.

Chapter 9. Configuring Outbound Processes

Outbound Process Modeling defines the business process of a store for outbound shipment.

Configuring Order Fulfillment Process

The process of order fulfillment is modeled through a pipeline. You can determine a pipeline for the order fulfillment process using pipeline determination.

For more information about Configuring an Order Document's Fulfillment Specific Components, see the *Sterling Selling and Fulfillment Foundation: Distributed Order Management Configuration Guide*.

Configuring Outbound Constraints

Outbound constraints are used to define conditions for shipping. You can also define the economic shipping parameters like the weight and volume threshold, the routing guides, and so forth.

For more information about defining outbound constraints, see the *Sterling Selling and Fulfillment Foundation: Distributed Order Management Configuration Guide*.

Configuring Shipment Modification Rules

Most orders follow the pipeline without requiring any modifications. However, there are times when modifications are required, such as changing the date or deleting a shipment.

Shipment Modification Rules apply to the following document types:

- Sales Order
- Transfer Order

For more information about defining modification rules, see the *Sterling Selling and Fulfillment Foundation: Distributed Order Management Configuration Guide*.

Defining Load Modification Rules

The load modification rules apply to the Load document type.

For more information about load modification rules, see the *Sterling Selling and Fulfillment Foundation: Logistics Management Configuration Guide*.

For more information about defining and changing modification rules, see the *Sterling Selling and Fulfillment Foundation: Configuration Guide*.

Defining Container 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. Sterling Selling and Fulfillment Foundation supports modifications through the

Console and APIs. It is critical for you to decide which modifications are allowed for each modification type, modification level, and status combination.

Important: Contemplate business and system integration implications before allowing a modification that is disallowed as part of the system defaults.

You can configure status modification rules and types, which can be classified into modification groups. Each modification group can be associated with a user-defined condition. For more information about modification groups, see the *Sterling Selling and Fulfillment Foundation: Distributed Order Management Configuration Guide*.

Chapter 10. Configuring Task Management

Task Management configuration enables you to set up your store to optimize node throughput and maximize worker efficiency.

Defining Installation Rules

Installation rules are the set of rules that apply to task management for task statuses, batch statuses, and task references.

Define Task Statuses

About this task

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:

Procedure

1. From the tree in the application rules side panel, choose Task Management > Installation Rules > Task Status. The Task Status window displays.
2. In the Task Status window, choose the task to be modified.
3. Choose the **Details** icon. The Task Status Details popup window displays.
4. Edit information as applicable in the Long Description and Short Description fields.
5. Choose the **Save** icon.

Modify Batch Status Descriptions

About this task

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:

Procedure

1. From the tree in the application rules side panel, choose Task Management > Installation Rules > Batch Status. The Batch Status window displays.
2. In the Batch Status window, choose the batch to be modified.
3. Choose the **Details** icon. The Batch Status Details popup window displays.
4. Edit information as applicable in the Long Description and Short Description fields.
5. Choose the **Save** icon.

View Task References

About this task

Task references are displays 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:

Procedure

1. From the tree in the application rules side panel, choose Task Management > Installation Rules > Task References. The Task References window displays.
2. In the Task references window, choose the Activity Group for which you want to view the task reference details.
3. Choose the **Details** icon. The Task Reference Details popup window displays.
4. Choose a relevant Activity Group and Task Reference.
5. Choose the **Save** icon.

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 to set up Task Modification reasons.

Set Up Task Modification Reasons

About this task

To set up task modification reasons:

Procedure

1. From the tree in the application rules side panel, choose Task Management > Reason Codes > Task Modification Reasons. The Task Modification Reasons window displays.
2. Choose the **Create New** icon. The Task Status Change Reason Details popup window displays.
3. Enter information in the applicable fields.
4. Choose the **Save** icon.

Modify Reason Codes

About this task

To modify task modification reasons:

Procedure

1. From the tree in the application rules side panel, choose Task Management > Reason Codes > Task Modification Reasons. The Task Modification Reasons window displays.
2. Select the Task Modification Reason to be modified.
3. Choose the **Details** icon. The Task Status Change Reason Details popup window displays.

4. Enter information in the applicable fields.
5. Choose the **Save** icon.

Delete Reason Codes

About this task

To delete task modification reasons:

Procedure

1. From the tree in the application rules side panel, choose Task Management > Reason Codes > Task Modification Reasons. The Task Modification Reasons window displays.
2. Select the Modification Reason Code to be deleted.
3. Choose the **Delete** icon.
4. Choose the **Save** icon.

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 a task type to individual tasks, the task executor knows 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. Sterling Selling and Fulfillment Foundation 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.

Note: You cannot add, delete, or modify Activity Groups. However, you can add, delete, and modify Task Types within these Activity Groups.

Each Activity Group has an associated group of activities. For example, the Outbound Picking activity group consists of tasks pertaining to picking, such as picking batches, picking items, and picking orders.

Create Task Type

About this task

Sterling Selling and Fulfillment Foundation provides a Task Type Wizard that enables you to plan work flow activities.

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. 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:

Procedure

1. From the tree in the application rules side panel, choose Task Management > Task Types. The Task Types window displays.
2. Select the Activity Group within which you want to create a task type.
3. Choose the **Create New** icon. 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 "Understanding Task Type Logic Flows". Enter information in the applicable fields and choose Next to continue until all applicable decision points have been answered.
8. Choose the **Save** icon.

   Note: When outbound pick tasks are run using printed tickets or other devices, the system automatically completes pick tasks that are open when performing pack operations.

Task Assignment Sort Order

About this task

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.

Modify Task Type

About this task

To modify a task type:

Procedure

1. From the tree in the application rules side panel, choose Task Management > Task Types. The Task Types window displays.
2. Expand the Activity Group that contains the task type you want to modify, if needed.
3. Choose the **Details** icon. The Task Type Wizard popup window displays.
4. Enter information in the applicable fields.
5. Choose the **Save** icon.

Delete Task Type

About this task

To delete a task type:

Procedure

1. From the tree in the application rules side panel, choose Task Management > Task Types. The Task Types window displays.

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 the **Delete** icon.

Defining User Skills

User Skills define the types of tasks and the places within a node are associated with a specific Team.

Teams are used to control access to the data contained in specific document types and Enterprises within the Console. A team 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 teams, see the *Sterling Selling and Fulfillment Foundation: 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.

Note: Setting Up User Task Types are mandatory, while Setting Up User Zones is optional.

Add User Task Type

About this task

To add a user task type:

Procedure

1. From the tree in the application rules side panel, choose Task Management > User Skills. The User Skills window displays.
2. Select the Team within which you want to define user skills. The User Skills window refreshes to display information as it pertains to the Team you selected.
3. In the User Task Types panel, select relevant Task Type and enter a Priority for the task type.
4. Choose the **Save** icon.

Modify User Task Type Definition

About this task

To modify a user task type definition:

Procedure

1. From the tree in the application rules side panel, choose Task Management > User Skills. The User Skills window displays.
2. Select the Team within which you want to define user skills. The User Skills window refreshes to display information as it pertains to the Team 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 the **Save** icon.

Delete User Task Type Definition

About this task

To delete a user task type definition:

Procedure

1. From the tree in the application rules side panel, choose Task Management > User Skills. The User Skills window displays.
2. Select the Team within which you want to delete a user task type. The User Skills window refreshes to display information as it pertains to the Team you selected.
3. In the User Task Types panel, select the task type you want to delete.
4. Choose the **Delete** icon.

Add Zone Constraints

About this task

To add a zone constraint:

Procedure

1. From the tree in the application rules side panel, choose Task Management > User Skills. The User Skills window displays.
2. Select the Team within which you want to define user skills. The User Skills window refreshes to display information as it pertains to the Team 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 the **Save** icon.

   Note: The Zone Type field is mandatory for all entries in the Zone Constraints panel, else 'Type must be entered' error is thrown while saving.

   Note: For Zone constraints to be applicable for task types with activity code as Count, select Source as the Zone type.

Modify Zone Constraint

About this task

To modify a zone constraint:

Procedure

1. From the tree in the application rules side panel, choose Task Management > User Skills. The User Skills window displays.
2. Select the Team within which you want to define user skills. The User Skills window refreshes to display information as it pertains to the Team you selected.
3. In the User Zone panel, select a Zone you want to modify and enter new data as needed.
4. Choose the **Save** icon.

Delete User Zone Definition

About this task

To delete a zone constraint:

Procedure

1. From the tree in the application rules side panel, choose Task Management > User Skills. The User Skills window displays.
2. Select the Team within which you want to delete a user zone definition. The User Skills window refreshes to display information as it pertains to the Team you selected.
3. In the User Zone panel, select the zone you want to delete.
4. Choose the **Delete** icon.

Setting Up Productivity Types

You can track all activities performed at the user and activity level. This is measured against productivity metric associated with the activity. You can calculate labor efficiency, and support activity-based compensation to all users.

Each activity in a store is modelled by identifying variables applicable to the productivity of an activity. You can define 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 are associated with a task type. Manual tasks run can be associated directly with a productivity type. For example, stacking of pallets, setting up of cartons for a cart.

Use Productivity Types to create, modify, and delete a Productivity Type.

Create Productivity Type

About this task

To create a productivity type:

Procedure

1. From the tree in the application rules side panel, choose Task Management > Productivity > Productivity Types. The Productivity Types window displays.
2. Choose the **Create New** icon. The Productivity Type Details window displays.

   Note: For voice-based tasks, productivity for a user is not tracked correctly.

Set Up Productivity Type's SAM Definition

About this task

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:

Procedure

1. In Productivity Type Details window, choose the SAM Definition tab.
2. Enter information in the applicable fields. Refer
3. Choose the **Save** icon.

Table 24. **SAM Definition Tab**

Field	Description
Productivity Type	Enter a name for the productivity type. 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'.
Description	Enter a description for the productivity type.
Capture Trip Level Metrics	Choose "Yes" to capture trip level metric. Choose "No" not to capture trip level metric. 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.
Max Idle Time Between Tasks	Enter the maximum idle time between tasks.

Table 24. **SAM Definition Tab** *(continued)*

Field	Description
SAM Definition	
Task Execution	
SAM Per Productivity Batch	Check the box to enter SAM for each productivity batch in minutes for task execution. This indicates the time credited for users for each system created batch or a trip, if trip-level metrics is set to "Yes". Stores that do not create batches and have the trip-level metrics set to "No", the time credit is considered for the entire day.
SAM Per Task	Check the box to enter SAM for each task in minutes for task execution. This indicates the time credited for users fro each task performed. Typically, either SAM per Productivity Batch or SAM Per Task values are used to specify SAM for a productivity type.
Planning	
SAM Per Productivity Batch	Check this box to enter SAM for each productivity batch in minutes for task planning. This indicates the time credited for users for each system created batch or a trip, if trip-level metrics is set to "Yes". Stores that do not create batches and have the trip-level metrics set to "No", the time credit is considered for the entire day.
SAM Per Task	Check this box to enter SAM for each task in minutes for task planning. Indicates the time credit for users for each task performed. Typically, either SAM per Productivity Batch or SAM Per Task values are used to specify SAM for a productivity type.
Product	
Task Execution	
SAM Per Item	Check this box to enter SAM for each item in minutes for task execution. This indicates the time credited for users per item handled.
SAM Per Case	Check this box to enter SAM for each case in minutes for task execution. This indicates the time credited for users per case handled.
SAM Per Unit Weight	Check this box to enter SAM for each unit weight in minutes for task execution. This indicates the time credited for users per unit weight handled.
SAM Per Unit	Check this box to enter SAM for each unit in minutes for task execution. This indicates the time credited for users per unit handled.

Table 24. **SAM Definition Tab** *(continued)*

Field	Description
SAM Per Pallet	Check this box to enter SAM for each pallet in minutes for task execution. This indicates the time credited for users per pallet handled.
Planning	
SAM Per Item	Check this box to enter SAM for each item in minutes for task planning. This indicates the time credited for users per item handled.
SAM Per Case	Check this box to enter SAM for each case in minutes for task planning. This indicates the time credited for users per case handled.
SAM Per Unit Weight	Check this box to enter SAM for each unit weight in minutes for task planning. This indicates the time credited for users per unit weight handled.
SAM Per Unit	Check this box to enter SAM for each unit in minutes for task planning. This indicates the time credited for users per unit handled.
SAM Per Pallet	Check this box to enter SAM for each pallet in minutes for task planning. Indicates the time credit for users per pallet handled.
Location	
SAM Per Source Location	Enter SAM for each source location in minutes. This indicates the time credited for users per source location visited.
SAM Per Source Aisle	Enter SAM for each source aisle in minutes. This indicates the time credited for users per source aisle visited.
SAM Per Target Location	Enter SAM for each target location in minutes. This indicates the time credited for users per target location visited.
SAM Per Target Aisle	Enter SAM for each target aisle in minutes. This indicates the time credited for users per target aisle visited.
SAM Per Unit Horizontal Distance	Enter SAM for each unit horizontal distance in minutes. This indicates the time credited for users per unit horizontal distance visited.
SAM Per Source Level	Enter SAM for each source level in minutes. This indicates the time credited for users per source level visited.

Table 24. **SAM Definition Tab** *(continued)*

Field	Description
SAM Per Unit Vertical Distance	Enter SAM for each unit vertical distance in minutes. This indicates the time credited for users per unit vertical distance visited.
SAM Per Target Level	Enter SAM for each target level in minutes. This indicates the time credited for users per target level visited.

Results

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*.

Set Up Productivity Type's Productivity References

About this task

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 is 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:

Procedure

1. In Productivity Type Details window, choose the Productivity References tab.
2. Enter information in the applicable fields.
3. Choose the **Save** icon.

Table 25. **Productivity References Tab**

Field	Description
Reference Name	Select the transactional reference associated with the productivity type from the drop-down list. Specify multiple references to track for a productivity type. For example, receipt productivity type has user id, receipt number, and shipment number, which are tracked as references.

Set Up Productivity Type's Task Types

About this task

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 "Defining Task Types".

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:

Procedure

1. In Productivity Type Details window, choose the Task Types tab.
2. Enter information in the applicable fields.
3. Choose the **Save** icon.

Table 26. **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.

Set Up Productivity Type's Equipment Types

About this task

A productivity type may be associated with an equipment type. When an equipment type uses an equipment and is associated with a productivity type, the SAM values defined for the equipment type are used to override the original SAM values defined for a productivity type.

To set up a productivity type's equipment types:

Procedure

1. In the Productivity Type Details window, choose the Equipment Types tab. The Equipment Types window displays.
2. In the Equipment Types window, choose the **Create New** icon.
3. The SAM Definition For Equipment Type window displays.
4. Enter information in the applicable fields.
5. Choose the **Save** icon.

Table 27. **SAM Definition For Equipment Type**

Fields	Description
Equipment Type	Select the equipment type from the drop-down list.
Productivity Type	Displays the productivity type associated with the selected equipment type.
Description	Displays the description of the productivity type.

Table 27. **SAM Definition For Equipment Type** *(continued)*

Fields	Description
Capture Trip Level Metrics	This is inherited from the previously configured trip level metrics as explained in Table 24 on page 60.
Max Idle Time Between Tasks	Displays the maximum idle time between tasks.
SAM Definition	
Task Execution	
SAM Per Productivity Batch	Check this box to enter the SAM for each productivity batch (in minutes) for the task execution. If trip-level metrics are set to "Yes", this indicates the time credited to users for each system created batch or a trip. For stores that do not create batches and have the trip-level metrics set to "No", the time credit is considered for the entire day.
SAM Per Task	Check this box to enter the SAM for each task (in minutes) for task execution. This indicates the time credited to users for each task performed. Typically, either the SAM Per Productivity Batch or the SAM Per Task values are used to specify the SAM for a productivity type.
Planning	
SAM Per Productivity Batch	Check this box to enter the SAM for each productivity batch in minutes for task planning. If trip-level metrics are set to "Yes", this indicates the time credited to users for each system created batch or a trip. For stores that do not create batches and have the trip-level metrics set to "No", the time credit is considered for the entire day.
SAM Per Task	Check this box to enter the SAM for each task (in minutes) for task planning. Indicates the time credited to users for each task performed. Typically, either the SAM Per Productivity Batch or the SAM Per Task values are used to specify the SAM for a productivity type.
Product	
Task Execution	
SAM Per Item	Check this box to enter the SAM for each item (in minutes) for task execution. This indicates the time credited to users per item handled.
SAM Per Case	Check this box to enter the SAM for each case (in minutes) for task execution. This indicates the time credited to users per case handled.

Table 27. **SAM Definition For Equipment Type** *(continued)*

Fields	Description
SAM Per Unit Weight	Check this box to enter the SAM for each unit weight (in minutes) for task execution. This indicates the time credited to users per unit weight handled.
SAM Per Unit	Check this box to enter the SAM for each unit (in minutes) for task execution. This indicates the time credited to users per unit handled.
SAM Per Pallet	Check this box to enter the SAM for each pallet (in minutes) for task execution. This indicates the time credited to users per pallet handled.
Planning	
SAM Per Item	Check this box to enter the SAM for each item (in minutes) for task planning. This indicates the time credited to users per item handled.
SAM Per Case	Check this box to enter the SAM for each case (in minutes) for task planning. This indicates the time credited to users per case handled.
SAM Per Unit Weight	Check this box to enter the SAM for each unit weight (in minutes) for task planning. This indicates the time credited to users per unit weight handled.
SAM Per Unit	Check this box to enter the SAM for each unit (in minutes) for task planning. This indicates the time credited to users per unit handled.
SAM Per Pallet	Check this box to enter the SAM for each pallet (in minutes) for task planning. This indicates the time credited to users per pallet handled.
Location	
SAM Per Source Location	Enter the SAM for each source location (in minutes). This indicates the time credited to users per source location visited.
SAM Per Source Aisle	Enter the SAM for each source aisle (in minutes). This indicates the time credited to users per source aisle visited.
SAM Per Target Location	Enter the SAM for each target location (in minutes). This indicates the time credited to users per target location visited.
SAM Per Target Aisle	Enter the SAM for each target aisle (in minutes). This indicates the time credited to users per target aisle visited.

Table 27. **SAM Definition For Equipment Type** *(continued)*

Fields	Description
SAM Per Unit Horizontal Distance	Enter the SAM for each unit horizontal distance (in minutes). This indicates the time credited to users per unit horizontal distance visited.
SAM Per Source Level	Enter the SAM for each source level (in minutes). This indicates the time credited to users per source level visited.
SAM Per Unit Vertical Distance	Enter the SAM for each unit vertical distance (in minutes). This indicates the time credited to users per unit vertical distance visited.
SAM Per Target Level	Enter the SAM for each target level (in minutes). This indicates the time credited to users per target level visited.

Modify Productivity Type

About this task

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

To modify a productivity type:

Procedure

1. From the tree in the application rules side panel, choose Task Management > Productivity > Productivity Types. The Productivity Types window displays with the list of Productivity Types.
2. Choose the Productivity Type to be modified. Choose the **Details** icon.
3. The Productivity Type Details window displays.
4. Enter information in the applicable fields.
5. Choose the **Save** icon.

Results

All modifications to the productivity type are applied to all future transactions.

Delete Productivity Type

About this task

To delete a productivity type:

Procedure

1. From the tree in the application rules side panel, choose Task Management > Productivity > Productivity Types. The Productivity Types window displays with the list of Productivity Types.
2. Choose the Productivity Type to be deleted.
3. Choose the **Delete** icon.

Results

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.

Setting Up Purge Criteria

Transactional data collected 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.

Set Up Purge Criteria for Productivity Types

To set up purge criteria:

1. From the tree in the application rules side panel, choose Task Management > Productivity > Productivity Types > Purge Criteria. The Purge Criteria List window displays.
2. In the Purge Criteria List window, choose the **Details** icon. The Purge Criteria Details pop-up window displays.
3. Enter information in the applicable fields.
4. Choose the **Save** icon.

Table 28. **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.
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.

Table 28. **Purge Criteria Details Pop-up Window** *(continued)*

Field	Description
Log File Name	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. The log file is created in the directory specified in the `yfs.purge.path` property. If this is not passed, it defaults to the value specified in the `yfs.properties` file. If a variable is introduced, then the `yfs.purge.path` is ignored. To modify this property, add an entry for it in the `<INSTALL_DIR>/properties/customer_overrides.properties` file. For additional information about modifying properties and the `customer_overrides.properties` file, refer to the *Sterling Selling and Fulfillment Foundation: Properties Guide*. For information about file name limitations relating to internationalization, refer to the *Sterling Selling and Fulfillment Foundation: Localization Guide*.

Defining Execution Exceptions

Exceptions that occur during the execution of tasks in a store 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.
- You can create, modify, or delete these types of execution exceptions:
  - Pick Execution Exceptions
  - Deposit Execution Exceptions
  - Skip Execution Exceptions

Create Pick Execution Exception

About this task

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:

Procedure

1. From the tree in the application rules side panel, choose Task Management > Execution Exceptions. The Execution Exception window displays.
2. Choose the Pick tab. The Pick tab window displays.
3. In the Pick tab window, choose the **Create New** icon. The Execution Exception Details window displays.
4. Enter information in the applicable fields.

5. Choose the **Save** icon.

Table 29. **Pick 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 run is put on hold due to this exception.
Freeze on variance	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.
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.

Modify Pick Execution Exception

About this task

Once a Pick Execution Exception has been created, it can be modified.

To modify a pick execution exception:

Procedure

1. From the tree in the application rules side panel, choose Task Management > Execution Exceptions. The Execution Exception window displays.
2. Choose the Pick tab. The Pick tab window displays with the list of Execution Exceptions.
3. Choose the Execution Exception to be modified.
4. Choose the **Details** icon. The Execution Exception Details window displays.
5. Enter information in the applicable fields.
6. Choose the **Save** icon.

Delete Pick Execution Exception

About this task

To delete a pick execution exception:

Procedure

1. From the tree in the application rules side panel, choose Task Management > Execution Exceptions. The Execution Exception window displays.
2. Choose the Pick tab. The Pick tab window displays with the list of Execution Exceptions.
3. Choose the Execution Exception to be deleted.
4. Choose the **Delete** icon.

Create Deposit Execution Exception

About this task

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:

Procedure

1. From the tree in the application rules side panel, choose Task Management > Execution Exceptions. The Execution Exception window displays.
2. Choose the Deposit tab. The Deposit tab window displays.
3. In the Deposit tab window, choose the **Create New** icon. The Execution Exception Details window displays.
4. Enter information in the applicable fields.
5. Choose the **Save** icon.

Table 30. **Deposit 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.

Table 30. **Deposit Execution Exception Details Window** *(continued)*

Field	Description
Freeze for Putaway	Select if the location is frozen for further putaway transactions due to this exception.
Suggest alternate Deposit Location	Select this check box if an alternative location will be automatically suggested by the system for this exception. If this check box is selected, the following options are enabled. Based on your requirement, select one of the following options: • Suggest location from the same target zone - Select this option if an alternative deposit location must be suggested from the same target zone. • Suggest location based on putaway preferences - Select this option if an alternative deposit location must be suggested from any zone based on the putaway preferences.
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.

Note: This ensures that an alternate deposit location is suggested on exception, and prevents a location with exception from being suggested for deposit.

Modify Deposit Execution Exception

About this task

Once a Deposit Execution Exception has been created, it can be modified.

To modify a deposit execution exception:

Procedure

1. From the tree in the application rules side panel, choose Task Management > Execution Exceptions. The Execution Exception window displays.
2. Choose the Deposit tab. The Deposit tab window displays with the list of Execution Exceptions.
3. Choose the Execution Exception to be modified.
4. Choose the **Details** icon. The Execution Exception Details window displays.
5. Enter information in the applicable fields.
6. Choose the **Save** icon.

Delete Deposit Execution Exception

About this task

To delete a deposit execution exception:

Procedure

1. From the tree in the application rules side panel, choose Task Management > Execution Exceptions. The Execution Exception window displays.
2. Choose the Deposit tab. The Deposit tab window displays with the list of Execution Exceptions.
3. Choose the Execution Exception to be deleted.
4. Choose the **Delete** icon.

Create Skip Execution Exception

About this task

The exceptions that are recorded when a user skips a task that is suggested, are recorded here.

To create a skip execution exception:

Procedure

1. From the tree in the application rules side panel, choose Task Management > Execution Exceptions. The Execution Exception window displays.
2. Choose the Skip tab. The Skip tab window displays.
3. In the Skip tab window, choose the **Create New** icon. The Execution Exception Details window displays.
4. Enter information in the applicable fields.
5. Choose **Save** icon.

Table 31. **Skip 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.

Table 31. **Skip Execution Exception Details Window** *(continued)*

Field	Description
Suggested alternate Deposit location	This option is not relevant for skip execution and is grayed out.
Mark target as full	This option is not relevant for skip execution and is grayed out.
Unassign User	Select if another user may run the task.
Allow partial deposit of Inventory	This option is not relevant for skip execution and is grayed out.

Modify Skip Execution Exception

About this task

Once a Skip Execution Exception has been created, it can be modified.

To modify a skip execution exception:

Procedure

1. From the tree in the application rules side panel, choose Task Management > Execution Exceptions. The Execution Exception window displays.
2. Choose the Skip tab. The Skip tab window displays with the list of Execution Exceptions.
3. Choose the Execution Exception to be modified.
4. Choose the **Details** icon. The Execution Exception Details window displays.
5. Enter information in the applicable fields.
6. Choose the **Save** icon.

Delete Skip Execution Exception

About this task

To delete a skip execution exception:

Procedure

1. From the tree in the application rules side panel, choose Task Management > Execution Exceptions. The Execution Exception window displays.
2. Choose the Skip tab. The Skip tab window displays with the list of Execution Exceptions.
3. Choose the Execution Exception to be deleted.
4. Choose the **Delete** icon.

Defining Transaction Repository for Task Management

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

- Transactions
- Conditions
- Actions
- Services

Sterling Selling and Fulfillment Foundation provides a base repository for each of the system-defined process types. Some of the entities within a repository are copied when creating a new document type. For more information about creating a new document type, see the *Sterling Selling and Fulfillment Foundation: Configuration Guide*.

For more information about defining process type details, see *Sterling Selling and Fulfillment Foundation: Configuration Guide*.

View Transactions

About this task

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

For more information about Transactions, see the *Sterling Selling and Fulfillment Foundation: Configuration Guide*.

To view the transaction repository details for task management:

Procedure

1. From the tree in the application rules side panel, choose Task Management > Transaction Repository. The Task Execution window displays.
2. In the Task Execution window, choose the **Transactions** icon.
3. The Transactions tab window displays.

Results

For more information about creating and modifying Transactions, see the *Sterling Selling and Fulfillment Foundation: Configuration Guide*.

Table 32. **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.
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.

Table 32. **Inventory - Transactions Tab Window** *(continued)*

Field	Description
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.

View Conditions

About this task

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 Sterling Selling and Fulfillment Foundation. You can use these attributes in any combination or you can create conditions that run the appropriate application logic for specific circumstances.

For more information about Conditions, see the *Sterling Selling and Fulfillment Foundation: Configuration Guide*.

To view the condition repository details for Task Management:

Procedure

1. From the tree in the application rules side panel, choose Task Management > Transaction Repository. The Task Execution window displays.
2. In the Task Execution window, choose the **Conditions** icon.
3. The Conditions tab window displays.

Results

For more information about creating and modifying Conditions, see the *Sterling Selling and Fulfillment Foundation: Configuration Guide*.

The default transaction repository does not have any conditions specified.

View Action Details

About this task

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 the *Sterling Selling and Fulfillment Foundation: Configuration Guide*.

To view the action repository details for Task Management:

Procedure

1. From the tree in the application rules side panel, choose Task Management > Transaction Repository. The Task Execution window displays.

2. In the Task Execution window, choose the **Actions** icon.
3. The Actions tab window displays.

Results

For more information about creating and modifying Actions, see *Sterling Selling and Fulfillment Foundation: Configuration Guide*.

Table 33. **Inventory - Actions Tab Window**

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

Table 33. **Inventory - Actions Tab Window** *(continued)*

Field	Description
Prints	Default settings are provided for: **PickList Print** – Invokes the print service for printing the Pick List. **LTL Manifest** – Invokes the print service for printing the Less-than Truck Load Manifest. **Print Load BOL** – Invokes the print service for printing the Load Bill of Lading. **Print PackList** – Invokes the print service for printing the Pack List. **Print Post Pick Container Labels** – Invokes the print service for printing UCC-128 container labels for containers, when system defined packing process is used. **Print Shipment BOL** – Invokes the print service for printing the Shipment Bill of Lading. **Print Shipping Label** – Invokes the print service for printing the UCC-128 container labels. **Print Wave** – Invokes the Print service for printing a Wave.
ReceiptPutaway	**Putaway products on receipt closure** – Indicates the default action provided to automatically initiate putaway of purchase order receipts. **Note:** Receipt and putaway of loose inventory for a serial tracked item is not supported. Receipt and putaway of serial inventory is supported only if the inventory is received on cases or pallets, and the system does a putaway of the entire case or pallet containing the serials.
RetrieveShipment	**Retrieve Requested Serial** – This service invokes the retrieveShipment API to retrieve the requested serials to the specified location.
Shipping	Default settings are provided for: **Load Left Origin** – Invokes the doLoadLeftOriginUpdates service to mark that the load has left the origin. **Stop Shipping** – Invokes the RaiseStopShippingAlert service to raise an alert to stop the processing of the shipment.

Table 33. **Inventory - Actions Tab Window** *(continued)*

Field	Description
Templates	Default settings are provided for: **Log Exception** – Logs the reasons due to which a count request could not be created for a Count Program. **Publish Data** – Sends data to external queue or internal tables. **Raise Exception** – Raises an alert using Event Management from the published information. **Send Email** – Raises an email action to create an email in the template format from the published information. **Send Email-HTML format** – Raises an email action to create an email in HTML format from the published information.

View Service Definitions

About this task

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 *Sterling Selling and Fulfillment Foundation: Configuration Guide*.

To view the service definition repository details for Task Management:

Procedure

1. From the tree in the application rules side panel, choose Task Management > Transaction Repository. The Task Execution window displays.
2. In the Task Execution window, choose the **Service Definitions** icon.
3. The Service Definitions tab window displays.

Results

For more information about creating and modifying Service Definitions, see the *Sterling Selling and Fulfillment Foundation: Configuration Guide*.

The default transaction repository does not have any service definitions specified.

Defining Purge Criteria for Task Management

Transactional data collected 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.

Set Up Purge Criteria for Task Management

About this task

To set up purge criteria:

Procedure

1. From the tree in the application rules side panel, choose Task Management > Purge Criteria. The Purge Criteria List window displays.
2. In the Purge Criteria List window, choose Purge Criteria to be set up.
3. Choose the **Details** icon. The Purge Criteria Details pop-up window displays.
4. Enter information in the applicable fields.
5. Choose the **Save** icon.

Description of Purge Criteria Details Pop-up Window

The following table lists the fields and descriptions of the Purge Criteria Details Pop-up window.

Table 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.
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	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. The log file is created in the directory specified in the `yfs.purge.path` property. If this is not passed, it defaults to the value specified in the `yfs.properties` file. If a variable is introduced, then the `yfs.purge.path` is ignored. To modify this property, add an entry for it in the `<INSTALL_DIR>/properties/customer_overrides.properties` file. For additional information about overriding properties using the `customer_overrides.properties` file, see the *Sterling Selling and Fulfillment Foundation: Properties Guide*. For information about file name limitations relating to internationalization, see the *Sterling Selling and Fulfillment Foundation: Localization Guide*.

Define Aisle-Level User Constraints

About this task

Aisle-level configuration allows a store to specify the number of users allowed to work in a particular aisle or aisle section at a time. The application does not suggest a task for a new user if the number of users already working in an aisle matches the number of users allowed to work simultaneously in that aisle.

To define aisle-level user constraints:

Procedure

1. From the tree in the application rules side panel, choose Task Management > Aisle User Constraints. The Aisle User Constraints window displays.
2. When you choose the **Details** icon, the Aisle User Constraints pop-up window, it displays details pertaining to an aisle's user.
3. When you choose **Create New** icon, the Aisle User Constraints pop-up window. Enter an aisle number and aisle section and specify the maximum number of users who will be allowed to work simultaneously in that aisle.
4. Choose the **Save** icon.

Table 35. **Aisle User Constraints**

Fields	Description
Aisle Number	Enter the aisle number.
Maximum Users Allowed	Enter the maximum number of users allowed to work simultaneously in an aisle.

Chapter 11. Managing Inventory

You can configure rules to track and monitor movement of inventory. This ensures the availability of product for shipment, whenever there is a requirement.

Configuring Inventory Related Rules

Inventory business rules are used to set up rules and common codes used for product item availability calculations and inventory handling.

For more information about configuring inventory rules, see the *Sterling Selling and Fulfillment Foundation: Global Inventory Visibility Configuration Guide*.

Setting up Count Program

This allows you to set up the count program.

For more information about defining count program, see the *Sterling Selling and Fulfillment Foundation: Global Inventory Visibility Configuration Guide*.

Configuring Count Process

You can configure count as per business requirements. To create a pipeline you can use the applicable transactions and conditions in the work area.

For more information about document type configuration, see the *Sterling Selling and Fulfillment Foundation: Configuration Guide*.

Configuring Count Rules

Count requests can be initiated through a 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 the Event Management and inventory monitors either when the inventory at a location reaches zero quantity, or when the minimum or maximum inventory levels are breached.

Define Variance Hold Setup

About this task

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:

Procedure

1. From the tree in the application rules side panel, choose Inventory > Count > Variance Hold Setup. The Variance Hold Setup window displays with the list of Zones.
2. Select the appropriate action at the zone level.
3. Choose the **Save** icon.

Description of Variance Hold Setup Window

The following table lists the fields and descriptions of the Variance Hold Setup window.

Table 36. 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.
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 are put on variance hold if negative variance is found during a Count operation.

Create a Request Type

About this task

To create a request type:

Procedure

1. From the tree in the application rules side panel, choose Inventory > Count > Request Types. The Request Type List window displays.
2. In the Request Type List window, choose the **Create New** icon. The Request Type Details pop-up window displays.
3. Enter information in the applicable fields.
4. Choose the **Save** icon.

Description of Request Type Details Pop-up Window

The following table lists the fields and descriptions of the Request Type Details Pop-up window.

Table 37. 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.

Create a New Request Type From an Existing Request Type
About this task

To create a new request type from an existing request type:

Procedure

1. From the tree in the application rules side panel, choose Inventory > Count > Request Types. The Request Type List window displays with the list of request types.
2. Choose the Request Type to be copied from. Choose the **Save As...** icon. The Request Type Details pop-up window displays.
3. Enter information in the applicable fields.
4. Choose the **Save** icon.

Description of Request Type Details Pop-up Window:

The following table lists the fields and descriptions of the Request Type Details Pop-up window.

Table 38. 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.

Modify a Request Type
About this task

Once a Request Type has been created, it may be modified.

To modify a request type:

Procedure

1. From the tree in the application rules side panel, choose Inventory > Count > Request Types. The Request Type List window displays with the list of Request Types.
2. Choose the Request Type to be modified. Choose the **Details** icon. The Request Type Details pop-up window displays.
3. Enter information in the applicable fields.
4. Choose the **Save** icon.

Description of Request Type Details Pop-up Window:

The following table lists the fields and descriptions of the Request Type Details Pop-up window.

Table 39. 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.

Delete a Request Type
About this task

To delete a request type:

Procedure

1. From the tree in the application rules side panel, choose Inventory > Count > Request Types. The Request Type List window displays with the list of Request Types.
2. Choose the Request Type to be deleted.
3. Choose the **Delete** icon.

Set a Request Type for Create Count Request
About this task

You can set the request type for create count request as cycle count or physical 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 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=MANUAL-COUNT.

For more information about defining resources, see the *Sterling Selling and Fulfillment Foundation: Configuration Guide*.

Create a Count Request Cancellation Reason
About this task

To create a count request cancellation reason:

Procedure

1. From the tree in the application rules side panel, choose Inventory > Count > Count Request Cancellation Reasons. The Count Request Cancellation Reasons window displays.
2. In the Count Request Cancellation Reasons window, choose the **Create New** icon.
3. The Count Cancellation Reason Details pop-up window displays.
4. Enter information in the applicable fields.
5. Choose the **Save** icon.

Description of Count Cancellation Reason Details Pop-up Window

The following table lists the fields and descriptions of the Count Cancellation Reason Details Pop-up window.

Table 40. 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 released work order for which a move request exists, Sterling Selling and Fulfillment Foundation requires a move request cancellation reason called 'SYSTEM'.

Create a New Count Request Cancellation Reason from an Existing Count Request Cancellation Reason

About this task

To create a new Count Request Cancellation Reason from an existing Count Request Cancellation Reason:

Procedure

1. From the tree in the application rules side panel, choose Inventory > Count > Count Request Cancellation Reasons.
2. The Count Request Cancellation Reasons window displays with the list of Count Cancellation Reason Codes.
3. Choose the Count Request Cancellation Reason to be copied.
4. Choose the **Save As...** icon. The Count Cancellation Reason Details pop-up window displays.
5. Enter information in the applicable fields.
6. Choose the **Save** icon.

Description of Count Cancellation Reason Details Pop-up Window:

The following table lists the fields and descriptions of the Count Cancellation Reason Details Pop-up window.

Table 41. 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 released work order for which a move request exists, Sterling Selling and Fulfillment Foundation requires a move request cancellation reason called 'SYSTEM'.

Modify a Count Request Cancellation Reason
About this task

Once a Count Request Cancellation Reason has been created, it can be modified.

To modify a Count Request Cancellation Reason:

Procedure

1. From the tree in the application rules side panel, choose Inventory > Count > Count Request Cancellation Reasons.
2. The Count Request Cancellation Reasons window displays with the list of Count Request Cancellation Reasons.
3. Choose the Count Request Cancellation Reason to be modified.
4. Choose the **Details** icon. The Count Cancellation Reason Details pop-up window displays.
5. Enter information in the applicable fields.
6. Choose the **Save** icon.

Description of Count Cancellation Reason Details Pop-up Window:

The following table lists the fields and descriptions of the Count Cancellation Reason Details Pop-up window.

Table 42. 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 released work order for which a move request exists, Sterling Selling and Fulfillment Foundation requires a move request cancellation reason called 'SYSTEM'.

Delete a Count Request Cancellation Reason
About this task

To delete a Count Request Cancellation Reason:

Procedure

1. From the tree in the application rules side panel, choose Inventory > Count > Count Request Cancellation Reasons.
2. The Count Request Cancellation Reasons window displays with the list of Count Request Cancellation Reasons.
3. Choose the Count Request Cancellation Reason to be deleted.
4. Choose the **Delete** icon.

Defining Count Program

You can 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 store, 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.

Create a Count Program

About this task

To create a count program:

Procedure

1. From the tree in the application rules side panel, choose Inventory > Count > Count Execution > Count Program. The Count Program List window displays.
2. In the Count Program List window, choose the **Create New** icon. The Count Program Details window displays.
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 the *Sterling Selling and Fulfillment Foundation: Configuration Guide*.
5. Choose the relevant request type from the drop-down menu.
6. Choose the **Save** icon. The Count Program Conditions panel is displays in the Count Program Details window.
7. In the Count Program Conditions panel, choose the **Create New** icon. The Count Program Condition Details Pop-up displays.

   Note: One location level count program per zone is recommended.
8. Enter information in the applicable fields.
9. Choose the **Save** icon. The pop-up window is closed, and you are returned to the Count Program Details window.
10. After setting up all the relevant Count Program Conditions, choose the **Create New** icon in the Count Program Details window.

Description of Count Program Condition Details Pop-up Window:

The following table lists the fields and descriptions of the Count Program Conditions Details Pop-up window.

Table 43. Count Program Condition Details Pop-up Window

Field	Description
Description	Enter a description for the count program condition.
Count Program Condition	

Table 43. Count Program Condition Details Pop-up Window (continued)

Field	Description
Select locations to be counted in the following zones	Choose the **Details** icon. In the List of Values pop-up, choose the zones that are to be counted.
Count at Location Level	Select this option if the counting is to be done at the location level.
Count at Classification Level	Select this option if the counting is to be done at the item classification level.
Item Classification	Displays the item classifications that are available to be counted.
Count at Item Level	Select this option if the counting is to be done at the item level.
Select Product Classes whose inventory is to be counted	Choose the **Details** icon. In the List of Values popup, choose the product classes that are to be counted.
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.
Percentage to Count	Enter the percentage of total locations, or items to count, depending on the location level or item level count.
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.

Modify a Count Program

About this task

To modify a Count Program:

Procedure

1. From the tree in the application rules side panel, choose Inventory > Count > Count Execution > Count Program. The Count Program List window displays with the list of existing programs.
2. Choose the Count Program that is to be modified. Choose the **Details** icon.
3. The Count Program Details window displays. Modify the entries as necessary.
4. Choose the **Save** icon.

Description of Count Program Condition Details Pop-up Window:

The following table lists the fields and descriptions of the Count Program Conditions Details Pop-up window.

Table 44. Count Program Condition Details Pop-up Window

Field	Description
Description	Enter a description for the count program condition.
Count Program Condition	
Select locations to be counted in the following zones	Choose the **Details** icon. In the List of Values pop-up, choose the zones that are to be counted.
Count at Location Level	Select this option if the counting is to be done at the location level.
Count at Classification Level	Select this option if the counting is to be done at the item classification level.
Item Classification	Displays the item classifications that are available to be counted.
Count at Item Level	Select this option if the counting is to be done at the item level.
Select Product Classes whose inventory is to be counted	Choose the **Details** icon. In the List of Values popup, choose the product classes that are to be counted.
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.
Percentage to Count	Enter the percentage of total locations, or items to count, depending on the location level or item level count.
Number of times to count	Enter the number of times to count.

Delete a Count Program
About this task

To delete a count program:

Procedure

1. From the tree in the application rules side panel, choose Inventory > Count > Count Execution > Count Program. The Count Program List window displays with the list of existing programs.
2. Choose the Count Program that is to be deleted.
3. Choose the **Delete** icon.

Defining Count Modification Groups

Tasks are scheduled 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 run through RF, which allows for online inventory updates and the ability to interleave count tasks during the process of a regular workday.

In some stores, 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, you can perform count without specifying these granular attributes. However, variance resolution of these tasks has to be done at the granular level.

Sterling Selling and Fulfillment Foundation supports modifications through the Console and APIs. It is critical for you to decide which modifications are allowed for each modification type, modification level, and status combination.

Important: Contemplate business and system integration implications before allowing a modification that is disallowed as part of the system defaults.

You can configure status modification rules and types. The set of rules and types can be classified into modification groups. Each modification group can be associated with a user-defined condition. For more information about modification groups, see the *Sterling Selling and Fulfillment Foundation: Distributed Order Management Configuration Guide*.

Set Up Count Modification Groups

About this task

To set up count modification groups:

Procedure

1. From the tree in the application rules side panel, choose Inventory > Count > Count Execution > Count Modification Groups. The Status Modification Group List window displays in the work area.
2. From the Status Modification Group List, click the **Plus** icon. The Status Modification Group Details window displays.
3. Enter information in the applicable fields. For field value descriptions, see Table 45.
4. Click the **Save** icon to save the modification group.

Table 45. Status Modification Group Details Window

Field	Description
Status Modification Group ID	Enter a name for the status modification group.
Description	Enter a description for the status modification group.
Inherited From Status Modification Group	(Optional) Select a parent status modification group if you want to inherit modification rules from another group.

Table 45. Status Modification Group Details Window (continued)

Field	Description
Is Override	(Optional) Check this option if you want this status modification group to take precedence.
Condition	(Optional) Select a condition if you want to specify a condition for this status modification group. Or, you can create a condition by clicking the **Plus** icon, which opens the Condition Detail window. Refer to "Adding Conditions to a Status Modification Group" on page 94 for information about configuring conditions for status modification groups. **Note:** If you do not specify a condition, this group's validation is enforced.
Subscribed Modification Types	
Available	Displays a list of available modification types. This list includes all system-supplied modification types as well as the custom modification types that you created in the Custom Modification window. To subscribe a modification type, select the modification type in the Available list and click the **Right Arrow** icon.
Subscribed	Displays a list of the modification types for which you want to define modification rules. To remove a modification type from the subscribed list, select the modification type in the Subscribed list and click the **Left Arrow** icon. Click the **Save** icon to display the subscribed modification types in the Modification Rules tab.
Modification Rules	
Group By	Select a sort option for displaying modification types in the **Primary Info** tab. You can sort modification types by type, level, and status.
Primary Info	Displays the modification types that you subscribed in the Subscribed Modification Types tab. Expand the applicable modification types and levels for which you want to set up modification rules. Right click on the applicable rule and choose Allow, Disallow, or Ignore as per your business practices. For more information about available count modification rules, see "Description of Modification Rules for Count" on page 94.

Results

For more information about modification groups, see the *Sterling Selling and Fulfillment Foundation: Distributed Order Management Configuration Guide*.

Description of Modification Rules for Count:

The following table lists the count modification rules:

Table 46. Modification Rules for Count

Field	Description
Cancel Count Request	Allow, Disallow, or Ignore cancellation of count request appropriately.
Update Count	Allows you to modify the count result.
Count Request	Allow or Disallow or Ignore modification types at the count request level appropriately.
Update Count	Allows you to modify the count result.

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

Adding Conditions to a Status Modification Group:
About this task

The Condition Detail window allows you to create a new condition for the status modification group. The Condition Detail window opens when you click the **Create New** icon, next to the Condition field, in the Status Modification Group Details window.

To create a condition for the status modification group:

Procedure

In the Condition Detail window, enter information in the following fields:

Option	Description
Condition ID	Enter the condition ID.
Condition Name	Enter the name of the condition for the status modification group.
Condition Group	Enter the name of the condition's group, if applicable. Condition Group allows you to group related conditions within the condition tree.
Static	If this is checked, you must enter a condition value for the static condition.
Dynamic	If this is checked, you must enter a Java class name that evaluates the condition at runtime.

Option	Description
Advanced XML	If you are creating a new condition, this option is disabled as a new condition of the advanced XML type must be created using the IBM Greex Editor IDE tool. For more information about creating an advanced XML condition using the IBM Greex Editor, see the *Sterling Selling and Fulfillment Foundation: Extending the Condition Builder*. This option is automatically selected whenever you modify a condition of the advanced XML type.
Condition Value (if Static is checked)	Click the **Condition Builder** icon to use the condition builder, which is where you set up the conditional value for the status modification group. You can set it up in a formulaic readout using the available symbols. You can enter your own attribute or an extended attribute if Static condition is checked. For example, if you are configuring a status modification group for the Field Sales Representative Group, use the {Enter Your Own Attribute} option in the Condition Builder to set the CurrentUserGroup attribute equal to the primary user group id for field sales. For more information about creating these attributes, see the *Sterling Selling and Fulfillment Foundation: Extending the Condition Builder*.
Class Name (if Dynamic is checked)	Enter the class name that implements the following Java interface: `com.yantra.ycp.japi.YCPDynamicCondition` **Note:** To use extended attributes for a condition, implement the YCPDynamicConditionEx interface. For more information about implementing this interface, refer to the *Sterling Selling and Fulfillment Foundation: Extending the Condition Builder*.
Condition Properties (if Dynamic is checked)	Specify the custom name or value properties which are set into the condition evaluating java class file before evaluating the condition. For more information about creating custom attributes, see the *Sterling Selling and Fulfillment Foundation: Extending the Condition Builder*.

Modifying a Status Modification Group

About this task

To modify a status modification group:

Procedure

1. From the tree in the application rules side panel, choose Inventory > Count > Count Execution > Count Modification Groups. The Status Modification Group List window displays in the work area.

2. From the Status Modification Group List, select the applicable modification group and choose the **Edit** icon. The Status Modification Group Details window displays.
3. Enter information in the applicable fields. Refer to Table 45 on page 92 for field value descriptions.
4. Click the **Save** icon.

Deleting a Status Modification Group

About this task

To delete a status modification group:

Procedure

1. From the tree in the application rules side panel, choose Inventory > Count > Count Execution > Count Modification Groups. The Status Modification Group List window displays in the work area.
2. From the Status Modification Group List, locate the applicable status modification group and click the **Delete** icon.

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

Sterling Selling and Fulfillment Foundation provides a base repository for each of the system-defined process types. Some of the entities within a repository are copied when creating a new document type. For more information about creating a new document type, see the *Sterling Selling and Fulfillment Foundation: Configuration Guide*.

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

View Count Process Type Details

About this task

To view count process type details:

Procedure

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 displays.
2. Primary information of the Process Type displays in the applicable fields.

Results

For more information about defining the primary information for process type details, see the *Sterling Selling and Fulfillment Foundation: Configuration Guide*.

Description of Process Type Details : Count Window:

The following table lists the fields and descriptions of the Process Type Details : Count Window.

Table 47. Process Type Details: Count Window

Field	Description
Primary Info	
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.

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.

Determining Pipeline

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 the *Sterling Selling and Fulfillment Foundation: Configuration Guide*.

Setting Up Hub Rule

When you expand the Pipeline Determination branch, the components display depends on what role you are logged in as. If you are logged in as a Hub role, the Hub Rule displays. If you are logged in as an Enterprise role, both the Hub Rule

and all user created determination rules (For example, My Rule) components display. Double-click on the 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.

Using the 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 the *Sterling Selling and Fulfillment Foundation: Configuration Guide*.

View the Count Pipeline Details

About this task

For more information about Pipelines, see the *Sterling Selling and Fulfillment Foundation: Configuration Guide*.

To view the count pipeline details:

Procedure

1. From the tree in the application rules side panel, choose Inventory > Count > Count Execution > Count Process Model. The Count Execution window displays.
2. In the Count Execution window, choose Count Execution Repository > Pipelines > Count Execution Pipeline.
3. The Pipeline Detail: Count Execution Pipeline (Count Execution) window displays.

Results

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

View the Transaction Details for a Count Pipeline

About this task

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

For more information about transactions, see the *Sterling Selling and Fulfillment Foundation: Configuration Guide*.

To view the transaction details for a count pipeline:

Procedure

1. From the tree in the application rules side panel, choose Inventory > Count > Count Execution > Count Process Model. The Count Execution window displays.
2. In the Count Execution window, choose the **Transactions** icon.
3. The Transactions tab window displays.

Results

For more information about creating and modifying transactions, see the *Sterling Selling and Fulfillment Foundation: Configuration Guide*.

Note: The following transactions are available only if you upgrade from Sterling Supply Chain Applications:

- Create Count Tasks
- Create Third Count Tasks
- Create Variance Tasks
- Third Counting Complete
- Variance Tasks Complete

Description of Count Execution Pipeline - Transactions Tab Window:

The following table lists the fields and descriptions of the Description of Count Execution Pipeline - Transactions Tab window.

Table 48. 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 store 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 Verification Complete	This transaction represents the verification of the final count results.
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 Request For Location Range	This transaction represents the creation of a count request for a particular range of location.
Create Count Tasks	This transaction represents the creation of count tasks for a count request.
Create Count Tasks 7.9	This transaction represents the creation of count tasks for a count request.
Create Recount Tasks 7.9	This transaction represents the creation of recount 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.
Create Variance Tasks 7.9	This transaction represents the creation of variance tasks after count has been completed at a location.
End Physical Count	This transaction represents the completion of physical count.
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.
Purge Count Request	This transaction represents the purging of one or more count requests based on their status.
Start Physical Count	This transaction represents the beginning of physical count.
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.

View the Status Details of a Count Pipeline

About this task

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 the *Sterling Selling and Fulfillment Foundation: Configuration Guide*.

To view the status details of a count pipeline:

Procedure

1. From the tree in the application rules side panel, choose Inventory > Count > Count Execution > Count Process Model. The Count Execution window displays.
2. In the Count Execution window, choose the **Statuses** icon.
3. The Statuses tab window displays.

Results

For more information about creating and modifying a status, see the *Sterling Selling and Fulfillment Foundation: Configuration Guide*.

Description of Count Execution Pipeline - Statuses Tab Window:

The following table lists the fields and descriptions of the Count Execution Pipeline - Statuses.

Table 49. 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.
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.

Table 49. Count Execution Pipeline - Statuses Tab Window (continued)

Field	Description
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.
Recount Tasks Created	This indicates that recount tasks are created for the count request. This corresponds to 'Create Recount Tasks 7.9' transaction.
Recount Tasks Completed	This indicates that all recount tasks for a count request are complete. This corresponds to 'Recount Tasks Complete' transaction.
Recount Tasks Completed With No Variance	This indicates that all recount tasks for a count request are complete with no variance value. This corresponds to 'Recount Tasks Complete' transaction and 'HasNoVariance' condition
Recount Tasks Completed With Resolvable Variance	This indicates that all recount tasks for a recount request are complete with resolvable variance. This corresponds to 'Recount Tasks Complete' transaction and 'varianceValue' condition.
Recount Tasks Completed With Unresolvable Variance	This indicates that all recount tasks for a count request are complete with unresolvable variance. This corresponds to 'Recount Tasks Complete' transaction and 'IsNotResolvable' 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.
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.

Table 49. Count Execution Pipeline - Statuses Tab Window (continued)

Field	Description
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.

View the Condition Details of a Count Pipeline

About this task

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 Sterling Selling and Fulfillment Foundation. You can use these attributes in any combination or you can create conditions that run the appropriate application logic for specific circumstances.

For more information about Conditions, see the *Sterling Selling and Fulfillment Foundation: Configuration Guide*.

To view the condition details of a count pipeline:

Procedure

1. From the tree in the application rules side panel, choose Inventory > Count > Count Execution > Count Process Model. The Count Execution window displays.
2. In the Count Execution window, choose the **Conditions** icon.
3. The Conditions tab window displays.

Results

For more information about creating and modifying conditions, see the *Sterling Selling and Fulfillment Foundation: Configuration Guide*.

Description of Count Execution Pipeline - Conditions Tab Window:

The following table lists the fields and descriptions of the Count Execution Pipeline - Conditions Tab window.

Table 50. 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.
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.
Prints	
IsCountBatch	Condition that evaluates if the activity group for the batch is COUNT.

View the Action Details of a Count Pipeline

About this task

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 the *Sterling Selling and Fulfillment Foundation: Configuration Guide*.

To view the action details of a count pipeline:

Procedure

1. From the tree in the application rules side panel, choose Inventory > Count > Count Execution > Count Process Model. The Count Execution window displays.
2. In the Count Execution window, choose the **Actions** icon.
3. The Actions tab window displays.

Results

For more information about creating and modifying Actions, see the *Sterling Selling and Fulfillment Foundation: Configuration Guide*.

Description of Count Execution Pipeline - Actions Tabs Window:

The following table lists the fields and descriptions of the Description of Count Execution Pipeline - Actions Tabs window.

Table 51. Count Execution Pipeline - Actions Tab Window

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

Table 51. Count Execution Pipeline - Actions Tab Window (continued)

Field	Description
Prints	Default settings are provided for: **PickList Print** – Invokes the print service for printing the Pick List. **LTL Manifest** – Invokes the print service for printing the Less-than Truck Load Manifest. **Print Load BOL** – Invokes the print service for printing the Load Bill of Lading. **Print PackList** – Invokes the print service for printing the Pack List. **Print Post Pick Container Labels** – Invokes the print service for printing UCC-128 container labels for containers, when system defined packing process is used. **Print Shipment BOL** – Invokes the print service for printing the Shipment Bill of Lading. **Print Shipping Label** – Invokes the print service for printing the UCC-128 container labels. **Print Wave** – Invokes the Print service for printing a Wave.
ReceiptPutaway	**Putaway products on receipt closure** – Indicates the default action provided to automatically initiate putaway of purchase order receipts. **Note:** Receipt and putaway of loose inventory for a serial tracked item is not supported. Receipt and putaway of serial inventory is supported only if the inventory is received on cases or pallets, and the system does a putaway of the entire case or pallet containing the serials.
RetrieveShipment	**Retrieve Requested Serial** – This service invokes the retrieveShipment API to retrieve the requested serials to the specified location.
Shipping	Default settings are provided for: **Load Left Origin** – Invokes the doLoadLeftOriginUpdates service to mark that the load has left the origin. **Stop Shipping** – Invokes the RaiseStopShippingAlert service to raise an alert to stop the processing of the shipment.

Table 51. Count Execution Pipeline - Actions Tab Window (continued)

Field	Description
Templates	Default settings are provided for: **Log Exception** – Logs the reasons due to which a count request could not be created for a Count Program. **Publish Data** – Sends data to external queue or internal tables. **Raise Exception** – Raises an alert using Event Management from the published information. **Send Email** – Raises an email action to create an email in the template format from the published information. **Send Email-HTML format** – Raises an email action to create an email in HTML format from the published information.

View the Service Definition Details of a Count Pipeline

About this task

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 *Sterling Selling and Fulfillment Foundation: Configuration Guide*.

To view the service definition details of a count pipeline:

Procedure

1. From the tree in the application rules side panel, choose Inventory > Count > Count Execution > Count Process Model. The Count Execution window displays.
2. In the Count Execution window, choose the **Service Definitions** icon.
3. The Service Definitions tab window displays.

Results

For more information about creating and modifying Service Definitions, see the *Sterling Selling and Fulfillment Foundation: Configuration Guide*.

Description of Count Execution Pipeline - Service Definitions Tab Window:

The following table lists the fields and descriptions of the Count Execution Pipeline - Service Definitions Tab window.

Table 52. Count Execution Pipeline - Service Definitions Tab Window

Field	Description
logCountTasksGenerationException	This service creates an exception when count task generation fails.
logExecuteCountProgram	This service creates an exception when no request is created during the execution of a count program.

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.

Set Up a Count Strategy

About this task

To create a count strategy:

Procedure

1. From the tree in the application rules side panel, choose Inventory > Count > Count Execution > Count Strategy. The Count Strategy Search window displays.
2. In the Count Strategy Search window, choose the **Create New** icon. The Count Strategy Details pop-up window displays.
3. Enter information in the applicable fields.
4. Choose the **Save** icon.

Description of Count Strategy Details Pop-up Window:

The following table lists the fields and descriptions of the Count Strategy Details Pop-up window.

Table 53. Count Strategy Details Pop-up Window

Field	Description
Activity Group	Activity group 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 identifier for the count strategy. This defines the transaction id of the count request. **Note:** • For Transaction Id **Create Count Task 7.9** and **Create Recount Task 7.9**, all task types will be shown. • For Transaction Id **Create Variance Tasks 7.9**, only task types that have "Capturing Inventory Attributes in Mandatory" enabled will be shown.

Table 53. Count Strategy Details Pop-up Window (continued)

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. **Note:** This drop-down field displays only when a transaction ID is selected.
Request Type	**This defines the request type for the count. Typical values are Cycle Count and Physical Count.**
Item Classification	**This defines the item classification attributes for determining the count strategy.** **A maximum of three item classifications can be defined.** An example, Product Line is shown below.
Task Type	Select the task type you want to use to count. **Note:** This field displays only when you select a transaction identifier suffixed with 7.9. **Note:** For Transaction Id **Create Variance Tasks 7.9**, only task types that have "Capturing Inventory Attributes in Mandatory" enabled will be shown.
Put Location on count even if No Inventory	**Select if** 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. **Note:** Honored only if the count request is at Zone or Node level. This is not applicable to count requests for a location, location range, aisle, bay or level.

Modify a Count Strategy

About this task

Once a count strategy has been created, it can be modified.

To modify a count strategy:

Procedure

1. From the tree in the application rules side panel, choose Inventory > Count > Count Execution > Count Strategy. The Count Strategy Search window displays.
2. Enter applicable search criteria, and choose the **Search** icon.
3. A list of Count Strategies displays in the Count Strategies panel.
4. Select the Count Strategy to be modified. Choose the **Details** icon.
5. The Count Strategy Details pop-up window displays.
6. Enter information in the applicable fields.
7. Choose the **Save** icon.

Results

All modifications are effective for future transactions only.

Description of Count Strategy Details Pop-up Window:

The following table lists the fields and descriptions of the Count Strategy Details Pop-up window.

Table 54. Count Strategy Details Pop-up Window

Field	Description
Activity Group	Activity group 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 identifier for the count strategy. This defines the transaction id of the count request. **Note:** • For Transaction Id **Create Count Task 7.9** and **Create Recount Task 7.9**, all task types will be shown. • For Transaction Id **Create Variance Tasks 7.9**, only task types that have "Capturing Inventory Attributes in Mandatory" enabled will be shown.
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. **Note:** This drop-down field displays only when a transaction ID is selected.
Request Type	**This defines the request type for the count. Typical values are Cycle Count and Physical Count.**
Item Classification	**This defines the item classification attributes for determining the count strategy.** **A maximum of three item classifications can be defined.** An example, Product Line is shown below.
Task Type	Select the task type you want to use to count. **Note:** This field displays only when you select a transaction identifier suffixed with 7.9. **Note:** For Transaction Id **Create Variance Tasks 7.9**, only task types that have "Capturing Inventory Attributes in Mandatory" enabled will be shown.
Put Location on count even if No Inventory	**Select if** 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. **Note:** Honored only if the count request is at Zone or Node level. This is not applicable to count requests for a location, location range, aisle, bay or level.

Delete a Count Strategy
About this task

To delete a count strategy:

Procedure

1. From the tree in the application rules side panel, choose Inventory > Count > Count Execution > Count Strategy. The Count Strategy Search window displays.
2. Enter applicable search criteria, and choose the **Search** icon.
3. A list of Count Strategies displays in the Count Strategies panel.
4. Select the Count Strategy to be deleted.
5. Choose the **Delete** icon.

Defining Purge Criteria for Count

Transactional data collected 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.

Set Up Purge Criteria for Count
About this task

To set up purge criteria:

Procedure

1. From the tree in the application rules side panel, choose Inventory > Count > Count Execution > Purge Criteria. The Purge Criteria List window displays.
2. In the Purge Criteria List window, choose the **Details** icon. The Purge Criteria Details pop-up window displays.
3. Enter information in the applicable fields.
4. Choose the **Save** icon.

Description of Purge Criteria Details Pop-up Window:

The following table lists the fields and descriptions of the Purge Criteria Details Pop-up window.

Table 55. 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 55. Purge Criteria Details Pop-up Window (continued)

Field	Description
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.
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	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. The log file is created in the directory specified in the `yfs.purge.path` property. If this is not passed, it defaults to the value specified in the `yfs.properties` file. If a variable is introduced, then the `yfs.purge.path` is ignored. To modify this property, add an entry for it in the `<INSTALL_DIR>/properties/customer_overrides.properties` file. For additional information about overriding properties using the `customer_overrides.properties` file, see the *Sterling Selling and Fulfillment Foundation: Properties Guide*. For information about file name limitations relating to internationalization, see the *Sterling Selling and Fulfillment Foundation: Localization Guide*.

Defining Corporate Count Request Purge Criteria

Transactional data collected 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.

Set Up Corporate Count Request Purge Criteria

About this task

To set up purge criteria:

Procedure

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 displays.
2. In the Purge Criteria List window, choose the **Details** icon. The Purge Criteria Details pop-up window displays.
3. Enter information in the applicable fields.

4. Choose the **Save** icon.

Description of Purge Criteria Details Pop-up Window:

The following table lists the fields and descriptions of the Purge Criteria Details Pop-up window.

Table 56. 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.
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	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. The log file is created in the directory specified in the `yfs.purge.path` property. If this is not passed, it defaults to the value specified in the `yfs.properties` file. If a variable is introduced, then the `yfs.purge.path` is ignored. To modify this property, add an entry for it in the `<INSTALL_DIR>/properties/customer_overrides.properties` file. For additional information about overriding properties using the `customer_overrides.properties` file, see the *Sterling Selling and Fulfillment Foundation: Properties Guide*. For information about file name limitations relating to internationalization, see the *Sterling Selling and Fulfillment Foundation: Localization Guide*.

Configuring Supply and Demand Types

You can identify the supply and demand type associations used to determine inventory availability for a specific demand type.

For more information about defining supply types, demands type, and considerations, see the *Sterling Selling and Fulfillment Foundation: Global Inventory Visibility Configuration Guide*.

Configuring Availability Safety Factors

You can define available safety factors that indicate what percentage of current or future inventory should be excluded during order promising.

You can apply availability safety factor and safety factor percentage to the current and future inventory.

For more information about configuring availability safety factors, see the *Sterling Selling and Fulfillment Foundation: Global Inventory Visibility Configuration Guide*.

Configuring How Supply and Demand are Changed with Order Status

You can define how and when inventory is updated for sellers and buyers tracking inventory, on a status-by-status basis. The Status Inventory Types table is used to associate statuses with specific supply and demand types according to organization. When an order passes through various statuses of fulfillment, the values corresponding to the Buyer supply type and Seller demand type associated with the original status are decreased, and the values for the status the order is moving into are increased.

For more information about defining status inventory types, see the *Sterling Selling and Fulfillment Foundation: Distributed Order Management Configuration Guide*.

Configuring Inventory Node Type Rules

You can create inventory rules based on node types. These rules are applied to nodes belonging to the node type on the rule.

For more information about configuring inventory node type rules, see the *Sterling Selling and Fulfillment Foundation: Global Inventory Visibility Configuration Guide*.

Defining Purge Criteria for Move Request

Transactional data collected 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.

Set Up Purge Criteria for Move Request

About this task

To set up purge criteria:

Procedure

1. From the tree in the application rules side panel, choose Inventory > Move Request > Purge Criteria. The Purge Criteria List window displays.
2. In the Purge Criteria List window, the Purge Details icon. The Purge Criteria Details pop-up window displays.
3. Enter information in the applicable fields.
4. Click the Save icon.

Description of Purge Criteria Details Pop-up Window - Set up

The following table lists the fields and descriptions to set up the purge criteria using the Purge Criteria Details Pop-up window.

Table 57. 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.
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	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. The log file is created in the directory specified in the `yfs.purge.path` property. If this is not passed, it defaults to the value specified in the `yfs.properties` file. If a variable is introduced, then the `yfs.purge.path` is ignored. To modify this property, add an entry for it in the `<INSTALL_DIR>/properties/customer_overrides.properties` file. For additional information about overriding properties using the `customer_overrides.properties` file, see the *Sterling Selling and Fulfillment Foundation: Properties Guide*. For information about file name limitations relating to internationalization, see the *Sterling Selling and Fulfillment Foundation: Localization Guide*.

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 store and its processes.

Create a Move Request Cancellation Reason

About this task

To create a move request cancellation reason:

Procedure

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 displays.

3. Click the Create New icon. The Move Request Cancel Reason Details pop-up window displays.
4. Enter information in the applicable fields.

Description of Move Request Cancel Reason Details Pop-up Window

The following table lists the fields and descriptions of the Move Request Cancel Reason Details Pop-up window.

Table 58. 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.

Create a New Move Request Cancellation Reason from an Existing Move Request Cancellation Reason

About this task

To create a new move request cancellation reason from an existing move request cancellation reason:

Procedure

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 displays with the list of Move Request Cancellation Reasons.
3. Select the Move Request Cancellation Reason to be copied.
4. Click the **Save As** icon. The Move Request Cancel Reason Details pop-up window displays.
5. Enter information in the applicable fields.
6. Click the Save icon.

Description of Move Request Cancel Reason Details Pop-up Window

The following table lists the fields and descriptions of the Move Request Cancel Reason Details Pop-up window.

Table 59. 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.

Modify a Move Request Cancellation Reason

About this task

Once a Move Request Cancellation Reason has been created, it can be modified.

To modify a move request cancellation reason:

Procedure

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 displays with the list of Move Request Cancellation Reasons.
3. Select the Move Request Cancellation Reason to be modified.
4. Click the Modify icon. The Move Request Cancel Reason Details pop-up window displays.
5. Enter information in the applicable fields.
6. Click the Save icon.

Description of Move Request Cancel Reason Details Pop-up Window

The following table lists the fields and descriptions of the Move Request Cancel Reason Details Pop-up window.

Table 60. 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.

Delete a Move Request Cancellation Reason

About this task

To delete a move request cancellation reason:

Procedure

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 displays with the list of Move Request Cancellation Reasons.
3. Select the Move Request Cancellation Reason to be deleted.
4. Click the Delete icon.

Chapter 12. Configuring Alert Management

You can define alerts types and alert queues.

Defining Alert Types

An alert is a message directed to a user or an alert queue about a transaction that needs manual intervention. Alerts are sent to different queues depending on the notification definitions you have configured.

For more information about defining alert types, see the *Sterling Selling and Fulfillment Foundation: Configuration Guide*.

Defining Alert Queues

You can define alert queues to apply rules and methods for alert notifications.

For more information about configuring alert queues, see the *Sterling Selling and Fulfillment Foundation: Configuration Guide*.

Chapter 13. Configuring User Security

User Security enables a store manager to ensure that users have access to information that is appropriate for carrying out their tasks.

Defining Users

A user is an individual who can perform certain tasks such as Hub Administrator or Store Manager, depending on what role the user plays in the organization. Each organization has its own users.

For more information about configuring user security, see the *Sterling Selling and Fulfillment Foundation: Configuration Guide*.

Defining User Roles

You can define user roles for your organization. User Roles are also known as user groups. A user group is a set of users who perform similar tasks.

For more information about defining user roles, see the *Sterling Selling and Fulfillment Foundation: Configuration Guide*.

Configuring Data Security

You can define data security groups to which users can be assigned. Data security limits the access of data to only those who are authorized to view or modify that data.

For more information about defining data security groups, see the *Sterling Selling and Fulfillment Foundation: Configuration Guide*.

Chapter 14. Configuring System Administration

System Administration configuration defines the common codes and provides system-level information such as purge criteria, health monitor rules, and so forth.

You can use System Administration for:

- Defining Initial Context Factory Codes
- Viewing Servers
- Configuring Health Monitor Rules
- Defining Count Purge Criteria
- Defining System Purge Criteria
- Defining Sales Order Purge Criteria
- Defining Agent Criteria Groups

For more information about configuring system administration components, see the *Sterling Selling and Fulfillment Foundation: Configuration Guide*.

Defining Devices

A store 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 define a Device Type, a Device Sub Type, or a Device.

Defining a Device Type

All the devices are grouped 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.

You can create, modify, or delete a device type.

Create Device Type

About this task

To create a device type:

Procedure

1. From the tree in the application rules side panel, choose System Administration > Devices. The Device Setup window displays.
2. In the Device Setup window, choose the **Add New Device Type** icon. The Device Type pop-up window displays.
3. Enter information in the applicable fields.
4. Choose the **Save** icon.

Table 61. **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.

Modify Device Type

About this task

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

To modify a device type:

Procedure

1. From the tree in the application rules side panel, choose System Administration > Devices.
2. The Device Setup window displays with the list of Device Types.
3. Select the Device Type to be modified. Choose the **Details** icon.
4. The Device Type pop-up window displays.
5. Enter information in the applicable fields. .
6. Choose the **Save** icon.

Delete Device Type

About this task

To delete a device type:

Procedure

1. From the tree in the application rules side panel, choose System Administration > Devices.
2. The Device Setup window displays with the list of Device Types.
3. Select the Device Type to be deleted. Choose the **Delete** icon.

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.

You can create, modify, or delete a Device Sub Type.

Create Device Sub Type

About this task

To create a device sub type:

Procedure

1. From the tree in the application rules side panel, choose System Administration > Devices. The Device Setup window displays.
2. In the Device Setup window, select Device Type whose Device Sub Type is to be created.
3. Choose the **Add New Device Sub Type** icon. The Device Sub Type pop-up window displays.
4. Enter information in the applicable fields.
5. Choose the **Save** icon.

Table 62. **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.
Printer Type Document Association	
This panel is available when the value of the Device Type is set to "Printer."	
Printer Type Document Association	Select which print documents you would like to associate with the selected printer.

Note: If you are configuring a new Device Sub Type for printing the FedEx Carrier Label, ensure that you map the value of the new Device Sub Type in the YCS Mapping table. Default mapping has been provided in YCS Mapping table for Device Sub Type such as Zebra and Eltron. For more information about the YCS Mapping table, see the *Parcel Carrier: Adapter Guide*.

Modifying 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 displays.
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 displays.
3. Select the Device Sub Type to be modified. Choose the **Details** icon.
4. The Device Sub Type pop-up window displays.
5. Enter information in the applicable fields.
6. Choose the **Save** icon.

Delete Device Sub Type

About this task

To delete a device sub type:

Procedure

1. From the tree in the application rules side panel, choose System Administration > Devices. The Device Setup window displays.
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 displays.
3. Select the Device Sub Type to be deleted.
4. Choose the **Delete** icon.

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 must be defined as devices.

For example, a store that has five HP LaserJet 5P printers and four Zebra R140 printers has all the nine printers configured as devices.

One or more devices can be associated with equipment and/or a station.

For more information about associating a device with equipment, see "Setting Up an Equipment Device Association".

For more information about associating a device with a station, see "Setting Up a Station Device Association".

You can create a device, create a new device from an existing device, or modify or delete a device.

Create Device

About this task

To create a device:

Procedure

1. From the tree in the application rules side panel, choose System Administration > Devices. The Device Setup window displays.
2. In the Device Setup window, select the relevant Device Type and Device Sub Type whose Device is to be created.
3. Choose the **Add New Device** icon. The Device pop-up window displays.
4. Enter information in the applicable fields.
5. Choose the **Save** icon.

Table 63. **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	**This indicates the additional attributes of the device.** **For more information about setting up a device attribute, refer to, "Setting Up a Device Attribute".**

Results

A list of standard device type, sub type and individual devices that is supported is provided. 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'. The 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 about this directory, including this variable, see the *Sterling Selling and Fulfillment Foundation: Configuration Guide*.

  Note: The DropDirectory attribute appears in the Applications Manager only if the `yfs.loftware.tcpip.sockets` property is set to `N <INSTALL_DIR>/properties/customer_overrides.properties` file. For additional information about overriding properties using the `customer_overrides.properties` file, see the *Sterling Selling and Fulfillment Foundation: Properties Guide*.
- PrinterAlias - The printer alias as configured in the Loftware printer setup.

  Note: While setting up a Printer device, ensure that the Printer Alias is exactly the same as that specified in the Loftware printer set-up.

  Note: In instances where a network printer is used, ensure that the Printer Alias does NOT contain the prefix "\\". However, Loftware may require the printer to be defined by prefixing "\\".
- PrinterServerHostName - The host name for the Loftware Print Server. While IP Address may be sufficient, the use of host name is recommended for ease of maintenance.
- PrintServerPort - The port on which Loftware Print Server listens for print requests. By default, the print server port for Loftware Print Server is 2723.

Note: The PrinterServerHostName and PrintServerPort attributes appear in the Applications Manager only if the `yfs.loftware.tcpip.sockets` property is set to `Y` in the `<INSTALL_DIR>/properties/customer_overrides.properties` file. For additional information about overriding properties using the `customer_overrides.properties` file, see the *Sterling Selling and Fulfillment Foundation: Properties Guide*.

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, refer the weighing scale user manual.

Set Up Device Attribute

About this task

Device attributes define the method of communication with the appropriate device. An HP LaserJet printer has 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:

Procedure

1. In Device Attributes panel of the Device pop-up window, choose the **Create New** icon.
2. The Criteria Parameter Details pop-up window displays.
3. Enter information in the applicable fields.
4. Choose the **Save** icon.

Table 64. **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.

Create a New Device from a Device

About this task

To create a new device from a device:

Procedure

1. From the tree in the application rules side panel, choose System Administration > Devices. The Device Setup window displays.
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 displays. Select the Device to be copied to create a new device.
4. Choose the **Save As...** icon. The Device pop-up window displays.
5. Enter information in the applicable fields. .
6. Choose the **Save** icon.

Results

The list of standard device type, sub type and individual devices that is supported is provided. 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'. The Loftware 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 the *Sterling Selling and Fulfillment Foundation: Configuration Guide*.

  Note: The DropDirectory attribute appears in the Applications Manager only if the `yfs.loftware.tcpip.sockets` property is set to `N` in the `<INSTALL_DIR>/properties/customer_overrides.properties` file. For additional information about overriding properties using the `customer_overrides.properties` file, see the *Sterling Selling and Fulfillment Foundation: Properties Guide*.
- PrinterAlias - The printer alias as configured in the Loftware printer setup.

  Note: While setting up a Printer device, ensure that the Printer Alias is exactly the same as that specified in the Loftware printer setup.

  Note: In instances where a network printer is used, ensure that the Printer Alias does NOT contain the prefix "\\". However, Loftware may require the printer to be defined by prefixing "\\".
- PrinterServerHostName - The host name for the Loftware Print Server. While IP Address may be sufficient, the use of host name is recommended for ease of maintenance.
- PrintServerPort - The port on which Loftware Print Server listens for print requests. By default, the print server port for Loftware Print Server is 2723.

  Note: The PrinterServerHostName and PrintServerPort attributes appear in the Applications Manager only if the `yfs.loftware.tcpip.sockets` property is set to `Y` in the `<INSTALL_DIR>/properties/customer_overrides.properties` file. For additional information about overriding properties using the `customer_overrides.properties` file, see the *Sterling Selling and Fulfillment Foundation: Properties Guide*.

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 "Setting Up a Device Attribute".

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.

Modify Device

About this task

Once a Device has been created, it can be modified.

To modify a device:

Procedure

1. From the tree in the application rules side panel, choose System Administration > Devices. The Device Setup window displays.
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 displays. Select the Device to be modified.
4. Choose the **Details** icon. The Device pop-up window displays.
5. Enter information in the applicable fields.
6. Choose the **Save** icon.

Delete Device

About this task

To delete a device:

Procedure

1. From the tree in the application rules side panel, choose System Administration > Devices. The Device Setup window displays.
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 displays. Select the Device to be deleted.
4. Choose the **Delete** icon.

Defining Prints

The operation of a store 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 store include packing lists, BOL, carrier labels, SKU labels, and UCC128 SCM labels.

The standard documents that include are as follows:

- 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

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 "Defining a Device Sub Type".

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, "Setting Up an Equipment Device Association".

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 , "Setting Up a Station Device Association".

The association of a document to a label format and name is done here.

You can define print documents, user printer preferences, and participant print preferences.

Defining Print Documents

A document is assigned a name and a corresponding label format here. A standard list of documents for the prints supported is provided.

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 to create, modify, or delete a Print Document.

- Create Print Document

- Modify Print Document
- Delete Print Document

Create Print Document

About this task

To create a print document:

Procedure

1. From the tree in the application rules side panel, choose System Administration > Prints > Print Documents. The Print Documents window displays with the default print documents.
2. Enter information in the applicable fields. .
3. Choose the **Save** icon.

Table 65. **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.
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 Loftware Label Manager™.

Modify Print Document

About this task

Once a Print Document has been created, it can be modified.

To modify a print document:

Procedure

1. From the tree in the application rules side panel, choose System Administration > Prints > Print Documents. The Print Documents window displays with a list of print documents.
2. Enter information in the applicable fields.
3. Choose the **Save** icon.

Results

It is recommended that the provided standard print documents is not modified.

Delete Print Document

About this task

To delete a print document:

Procedure

1. From the tree in the application rules side panel, choose System Administration > Prints > Print Documents. The Print Documents window displays with a list of print documents.
2. Choose the Print Document to be deleted.
3. Choose the **Delete** icon.

Results

It is recommended that the provided standard print documents is not modified.

Defining Label Formats

Label formats corresponding to the documents are defined here. This allows association of a Label format to the Loftware™ label format and the mapping XML file.

The Loftware™ label format associated here is created using Loftware™ tools. The mapping XML file is created 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 the *Sterling Selling and Fulfillment Foundation: Installation Guide* for further information on installing and configuring the Loftware Label Manager™.

Standard label formats and mapping files are provided for all standard documents supported. A print is run through a service flow defined in the Service Definition Framework (SDF). A data flow is provided 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 displays the default label formats. For more information about defining label formats, refer to the *Sterling Selling and Fulfillment Foundation: Configuration Guide*.

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.

You can set up printer preferences for a group or for a user.

Set Up Printer Preferences for a Group

About this task

To set up printer preferences for a group:

Procedure

1. From the menu bar, choose Applications > Sterling Application Platform. The Sterling Application Platform tree displays in the side panel.
2. From the tree in the application rules side panel, choose Security > Groups. The Groups window displays with a list of groups.
3. In the Groups window, choose the Group whose Printer Preferences are to be set up.
4. Choose the **Details** icon. The Group Details window displays.
5. In the Group Details window, choose the Printer Preferences tab. The Printer Preferences tab window displays.
6. Enter the information in the applicable fields.
7. Choose the **Save** icon.

Results

For more information about Setting Up a Group (Creating, Modifying, or Deleting a Group), see the *Sterling Selling and Fulfillment Foundation: Configuration Guide*.

Table 66. **Printer Preferences Tab Window**

Field	Description
Printer Association	
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 stores that have only a single pack station.

Set Up Printer Preferences for a User

About this task

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:

Procedure

1. From the menu bar, choose Applications > Sterling Application Platform. The Sterling Application Platform tree displays in the side panel.
2. From the tree in the application rules side panel, choose Security > Users. The User Search window displays.
3. In the User Search window, enter applicable search criteria.
4. Choose the **Search** icon. The list of users displays in the Search Results panel of the User Search window.

For more information about Creating a New User, see the *Sterling Selling and Fulfillment Foundation: Configuration Guide*.

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 **Details** icon. The User Details window displays.
7. In the User Details window, choose the Printer Preferences tab. The Printer Preferences tab window displays.
8. Enter the information in the applicable fields.
9. Choose the **Save** icon.

   For more information about Setting Up a User (Creating, Modifying, or Deleting a User), see the *Sterling Selling and Fulfillment Foundation: Configuration Guide*.

Printer Preferences Tab Window
About this task

Table 67. Printer Preferences Tab Window

Field	Description
Printer Association	
Printer ID	Choose the printer ID to be associated with the user.

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.

Note: Participant print preferences are configured using Sterling Application Platform. For more information about this, see the *Sterling Selling and Fulfillment Foundation: Configuration Guide*.

A participant is associated with a role. For example, the ship node, enterprise, buyer, sellers, carriers are participants in the store. 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 store.

Set Up Print Format Preferences
About this task

To set up print format preferences for a participant:

Procedure

1. From the menu bar, choose Applications > Sterling Application Platform. The Sterling Application Platform tree displays in the side panel.
2. From the tree in the application rules side panel, choose Participant Modeling > Participant Setup. The Organization Search window displays.
3. In the Organization Search window, enter applicable search criteria.
4. Choose the **Search** icon. The list of organizations displays in the Search Results panel of the Organization Search window.

For more information about Creating a New Organization, see the *Sterling Selling and Fulfillment Foundation: 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 **Details** icon. The Organization Details window displays.
7. In the Organization Details window, choose the Roles & Participation tab. The Roles & Participation tab window displays.
8. In the Roles & Participation tab window, choose the Print Format Preferences tab.
9. The Print Format Preferences list displays in the Node Attributes tab.
10. Enter the information in the applicable fields.
11. Choose the **Save** icon.

    For more information about Setting Up an Organization (Creating, Modifying, or Deleting an Organization), see the *Sterling Selling and Fulfillment Foundation: Configuration Guide*.

Node Attributes Tab

About this task

Table 68. Node Attributes Tab

Field	Description
Print Format Preference	
Print Document	Choose the name of the document to be printed. For more information about creating a print document, see, "Create Print Document".
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, "Define Label Formats".

A list of default documents is provided. 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).

Chapter 15. Extending and Customizing the Application

You can customize the Sterling Store Inventory Management to meet your specific business needs. Use the tools provided by Sterling Store Inventory Management for customization.

To customize Sterling Store Inventory Management, set the CLASSPATH at the beginning of the script to include the following jar files:

- `ysopui.jar`
- `ysopbe.jar`
- `ysopbridge.jar`
- `ysopshared.jar`
- `ysoptools.jar`
- `ysopicons.jar`
- `yscpbe.jar`

Note: Ensure that the `ysopshared.jar` file is included before the `smcfsshared.jar` file.

After setting up the CLASSPATH, run Sterling Store Inventory Management in the development mode.

Configuring User Exit Management

You can configure user exits to enable business logic extensions to transactions. Within transactions, a code exists that invokes user exit so that you can plug in custom logic. For these pre-defined user exits, you can configure appropriate implementations. For more information about defining a user exit, see the *Sterling Selling and Fulfillment Foundation: Configuration Guide*.

Customizing the Application Menus

You can define menus that a user sees upon logging in to the application. For more information about modifying the application menus, see the *Sterling Selling and Fulfillment Foundation: Configuration Guide*.

Defining Extended Application Resources

You can define new resources and use them to extend components that are permission controlled. When you create a resource, you can grant or revoke permission to this resource through the user role configuration. For more information about defining application resources, see the *Sterling Selling and Fulfillment Foundation: Configuration Guide*.

The reference implementation provided by Sterling Store Inventory Management provides transactional and configurational data to demonstrate the functionality of all features that are introduced in this release. Additionally, you can use the data provided in the reference implementation as a starting point for your implementation of Sterling Store Inventory Management. Although the data provided needs to be used exactly as it is given, it helps you to understand how to configure Sterling Store Inventory Management to fit your business needs.

Defining Themes

You can define new color themes to use in the Sterling Store Inventory Management consoles. For more information about defining themes, see the *Sterling Selling and Fulfillment Foundation: Configuration Guide*.

Defining Custom Common Code Types

You can configure custom common code types for your application. Common codes are values that enable a user to choose from the options provided rather than entering the data manually. For more information about defining custom common code types, see the *Sterling Selling and Fulfillment Foundation: Configuration Guide*.

Defining Custom Common Codes

For any application, you can configure common code values for the custom common code type. For more information about defining custom common codes, see the *Sterling Selling and Fulfillment Foundation: Configuration Guide*.

Defining Custom Error Codes

You can define custom error codes and the descriptions to use along with the default error codes. For more information about defining custom error codes, see the *Sterling Selling and Fulfillment Foundation: Configuration Guide*.

Chapter 16. Configuring Store Processes

Before operating a store, a store needs to be configured according to the Sterling Store Inventory Management configurations.

Onboarding a Store

Onboarding a store is the configuration that needs to be done to set up a store.

A store can be modeled as one of the following:

- Store with no location - This is applicable for a store which does not track any inventory. No inventory operations can be performed in this store.
- Store with one location - Here, the entire store is modelled as one location. All inventory operations such as inventory adjustment, receiving, and cycle count can be performed. Store associates cannot perform inventory moves as the store comprises of only one location.

  Note: For single location stores, the location identifier is defined in the `sopbundle.properties` file and the bundle key provided is SOP_Single_Location_Store_Location_ID.
- Store with three locations - Here, the store is modelled with three locations. One location is designated as the customer service area, one for dock, and one for backroom.
- Store with multiple locations - Here, the store is modeled with multiple locations. In addition to the three locations set as part of the configuration, the store associate can create additional locations.

Once the store has been configured, it can be designated as a model store or a follower store. If a store is a model store, then other stores can follow the business processes and layout of this store.

If you designate a store to be a follower store, then you must select a model store for this store.

Onboard a Model Store

About this task

To onboard a store:

Procedure

1. Log in to Sterling Store Inventory Management as the Enterprise user.
2. From the menu bar, select Configuration > Launch Sterling Store Inventory Management Configurator. The Sterling Store Inventory Management Configurator opens.
3. From the Configuration Setup screen, select Configure Store Processes > Onboard A Store. The Onboard a Store screen opens.
4. Select a store from the drop-down list and click Next.

   The Store Address and Contact Information displays.
5. Click Next to designate a store as a model store or a regular store.

- If you want to designate a store as a model store, choose This is a Model Store and click Next.
- If you want to designate a store as a regular store, choose This follows Model Store # and select the model store from the drop-down list.

6. Click Finish.

Configure a Model Store

About this task

To configure a model store:

Procedure

1. Select the current locale from the drop-down list.
2. Perform the following steps to model a store:
   - To model a store as a single location store, choose Entire store is modeled as one location. Click Next. You can specify the reason codes and threshold amount. For more information about specifying the reason code and threshold value, see "Specify Reason Codes and Threshold Value".
   - To model a store with three locations, choose Limited Locations: Storefront, Backroom and Dock.
   - To model a store with many locations, choose Store has many locations.
   - To model a store where inventory is not managed, choose No Store Inventory Management on Sterling Store Inventory Management solution.
3. If you want to use Sterling Store Inventory Management to fulfill orders in a store, select the Use Sterling Store Inventory Management solution to fulfill orders within the store check box. Click Next to define your shipping options.

Specify Reason Codes and Threshold Value

About this task

You can specify the assigned codes for modification reason and threshold value for inventory adjustments.

Procedure

1. Specify reason codes for the following tasks:
   - In the Physical Count Reason Code field, enter the reason code for physical count.
   - In the Cycle Count reason Code field, enter the reason code for cycle count.
   - In the Inventory Moves Reason Code field, enter the reason code for inventory moves.
2. You can specify the threshold value for inventory adjustment.
   - In the Adjustment Threshold Value field, enter the threshold amount.
3. Click Next.
4. Click Finish.

Fulfill Orders on IBM Sterling Store Inventory Management Solution

About this task

To fulfill orders within a store:

Procedure

1. To record backroom pick for each order before the shipment is shipped or picked by the customer, check the Recording of backroom pick is mandatory for each shipment box. You can perform backroom pick either in scan or select mode.
   - To perform backroom pick in select mode, choose Entering ItemID and Quantity.
   - To perform backroom pick in scan mode, choose Scanning Item UPC Code.
2. To ship products using TL/LTL carriers, check the Enable TL/LTL shipping at store box.
3. You can perform customer pick either in the scan or select mode.
   - To perform customer pick in select mode, choose Entering ItemID and Quantity.
   - To perform customer pick on scan mode, choose Scanning Item UPC Code.
4. Click Next.

   Depending on the locations specified for the model store, one of the following screens is displayed:
   - If the entire store is modelled as a single location, the Specify Reason Code and Threshold Value screen is displayed.
   - If the store is modeled with limited locations or with multiple locations, the Specifying Identifiers screen is displayed.

   If the store is modeled as a store where inventory is not managed on Sterling Store Inventory Management, click Finish.

Specify Location Identifiers

About this task

You need to specify the location identifiers for the locations that the system can use.

Procedure

1. In the Receiving Dock Location ID field, enter the identifier for the location where inventory is received.
2. In the Storefront Location ID, enter the identifier for the location where the customer pick is done.
3. In the Backroom Location ID, enter the identifier for the backroom location.

   You cannot specify the identifier for backroom locations for a store with multiple locations.
4. Click Next. You can specify the reason codes and threshold amount. For more information about specifying the reason code and threshold value, see “Specify Reason Codes and Threshold Value” on page 140.

Modify the Model Store Processes

About this task

You can use this wizard to modify business processes within a model store.

To modify a model store:

Procedure

1. Log in to the Sterling Store Inventory Management solution as the Enterprise user.
2. From the menu bar, select Configuration > Launch Sterling Store Inventory Management Configurator. The Sterling Store Inventory Management Configurator displays.
3. From the Configuration Setup screen, select Configure Store Processes > Modify Model Store Processes. The Change Model Store Processes screen displays.
4. Select a model store from the drop-down list and click Next. The Store Address and Contact Information displays.
5. Click Next to designate a store as a model store or a regular store.
   - If you want to designate a store as a model store, choose This is a Model Store and click Next.
   - If you want to designate a store as a regular store, choose This follows Model Store # and select the model store from the drop-down list.
6. Click Finish.

Modify the Follower Store Processes

About this task

You can use this wizard to modify a follower store.

To modify a follower store:

Procedure

1. Log in to the Sterling Store Inventory Management as the Enterprise user.
2. From the menu bar, select Configuration > Launch Sterling Store Inventory Management Configurator. The Sterling Store Inventory Management Configurator displays.
3. From the Configuration Setup screen, select Configure Store Processes > Modify Follower Store Processes. The Change Follower Store Processes screen displays.
4. Select the follower store from the drop-down list and click Next. The Store Address and Contact Information displays.
5. Click Next to designate a store as a model store or a regular store.
   - If you want to designate a store as a model store, choose This is a Model Store and click Next.
   - If you want to designate a store as a regular store, choose This follows Model Store # and select the model store from the drop-down list.
6. Click Finish.

   When a user onboards a follower store with a "Single Location Store" as a model store, the follower store inherits the location identifier of the model store.

Configuring a Store Inventory Adjustment Reasons

An inventory adjustment 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 store performance.

The pre-defined reason codes such as 'RECEIPT', 'SHIP', 'PACK' are used for certain operations. These codes are mandatory for a store.

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.

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

Creating a Store Inventory Adjustment Reason

To create an inventory adjustment reason:

1. From the tree in the application rules side panel, choose Inventory > Inventory Adjustment Reasons. The Inventory Adjustment Reasons window displays.
2. Choose the **Create New** icon to create a new inventory adjustment reason. The Inventory Adjustment Reason Details window displays.
3. Enter information in the applicable fields.
4. Choose the **Save** icon.

Description of Inventory Adjustment Reason Details Window

The following table lists the fields and descriptions of the Inventory Adjustment Reason Details window.

Table 69. 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.
Accounting Bin	Choose the accounting bin location for the inventory, if required. Locations in the node with location type as 'VIRTUAL' displays. The accounting bin represents a virtual location in the store, which is used as a reconciliation mechanism for the inventory being adjusted. For example, in a 3PL store, 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. 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 store (usually a neighboring location). Choose the **Create New** icon to create a new accounting bin location for the inventory.

Table 69. Inventory Adjustment Reason Details Window (continued)

Field	Description
This Adjustment Reason Usually Implies	Choose either Increment, Decrement, or Either Increment or Decrement.
Host Reason Codes	
Enterprise Code	Choose the enterprise code.
Host Adjustment Reason Code	Choose the host adjustment reason code. The host reason code is used to translate store reason codes to a Host Reason Code. For example, a store 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. Choose the **Create New** icon to create a new Host Adjustment Reason Code, by entering Inventory Reason and its short and long descriptions.
Adjustment Sequence	
Adjustment Sequence	Displays the sequence or priority number of the locations or zones for adjustment. 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.
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.

Defining Adjustment Sequence

An inventory adjustment reason 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 *Sterling Selling and Fulfillment Foundation: Integration Guide*.

Create an Adjustment Sequence:

About this task

To create an adjustment sequence:

Procedure

1. In the Adjustment Sequence panel of the Inventory Adjustment Reason Details window, choose the **Create New** icon. The Adjustment Sequence Details window displays.
2. Enter information in the applicable fields.
3. Choose the **Save** icon.

Description of Adjustment Sequence Window: The following table lists the fields and descriptions of the Adjustment sequence window.

Table 70. Adjustment Sequence Details Window

Field	Description
Adjustment Sequence	Enter the sequence or priority number of the location or zone for adjustment. 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. 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.
Location ID	Enter the location from which the inventory is deducted. Choose the **Create New** icon to create a new location for adjustment. Choose the **Search** icon to search a configured location for adjustment.
Zone ID	Enter the zone from which the inventory is deducted. Choose the **Create New** icon to create a new zone for adjustment. Choose the **Search** icon to search a configured zone for adjustment.

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

Modify an Adjustment Sequence:
About this task

To modify an adjustment sequence:

Procedure

1. In the Adjustment Sequence panel of the Inventory Adjustment Reason Details window, choose the Adjustment Sequence to modify.
2. Choose the **Details** icon. The Adjustment Sequence Details window displays.
3. Enter information in the applicable fields.
4. Choose the **Save** icon.

Description of Adjustment Sequence Window: The following table lists the fields and descriptions of the Adjustment sequence window.

Table 71. Adjustment Sequence Details Window

Field	Description
Adjustment Sequence	Enter the sequence or priority number of the location or zone for adjustment. 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. 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.
Location ID	Enter the location from which the inventory is deducted. Choose the **Create New** icon to create a new location for adjustment. Choose the **Search** icon to search a configured location for adjustment.
Zone ID	Enter the zone from which the inventory is deducted. Choose the **Create New** icon to create a new zone for adjustment. Choose the **Search** icon to search a configured zone for adjustment.

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

Delete an Adjustment Sequence:
About this task

To delete an adjustment sequence:

Procedure

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

Create a New Inventory Adjustment Reason from an Existing Inventory Adjustment Reason

About this task

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

Procedure

1. From the tree in the application rules side panel, choose Inventory > Inventory Adjustment Reasons. The Inventory Adjustment Reasons window displays with the list of Inventory Adjustment Reasons.
2. Choose the Inventory Adjustment Reason to be copied from.

3. Choose the **Save As...** icon. The Inventory Adjustment Reason Details window displays.
4. Enter information in the applicable fields.
5. Choose the **Save** icon.

Description of Inventory Adjustment Reason Details Window

The following table lists the fields and descriptions of the Inventory Adjustment Reason Details window.

Table 72. 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.
Accounting Bin	Choose the accounting bin location for the inventory, if required. Locations in the node with location type as 'VIRTUAL' displays. The accounting bin represents a virtual location in the store, which is used as a reconciliation mechanism for the inventory being adjusted. For example, in a 3PL store, 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. 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 store (usually a neighboring location). Choose the **Create New** icon to create a new accounting bin location for the inventory.
This Adjustment Reason Usually Implies	Choose either Increment, Decrement, or Either Increment or Decrement.
Host Reason Codes	
Enterprise Code	Choose the enterprise code.
Host Adjustment Reason Code	Choose the host adjustment reason code. The host reason code is used to translate store reason codes to a Host Reason Code. For example, a store 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. Choose the **Create New** icon to create a new Host Adjustment Reason Code, by entering Inventory Reason and its short and long descriptions.
Adjustment Sequence	

Table 72. Inventory Adjustment Reason Details Window (continued)

Field	Description
Adjustment Sequence	Displays the sequence or priority number of the locations or zones for adjustment. 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.
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.

Modify an Inventory Adjustment Reason

About this task

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

To modify an inventory adjustment reason:

Procedure

1. From the tree in the application rules side panel, choose Inventory > Inventory Adjustment Reasons. The Inventory Adjustment Reasons window displays with the list of Inventory Adjustment Reasons.
2. Choose the Inventory Adjustment Reason to modify.
3. Choose the **Details** icon. The Inventory Adjustment Reason Details window displays.
4. Enter information in the applicable fields.
5. Choose the **Save** icon.

Description of Inventory Adjustment Reason Details Window

The following table lists the fields and descriptions of the Inventory Adjustment Reason Details window.

Table 73. 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 73. Inventory Adjustment Reason Details Window (continued)

Field	Description
Accounting Bin	Choose the accounting bin location for the inventory, if required. Locations in the node with location type as 'VIRTUAL' displays. The accounting bin represents a virtual location in the store, which is used as a reconciliation mechanism for the inventory being adjusted. For example, in a 3PL store, 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. 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 store (usually a neighboring location). Choose the **Create New** icon to create a new accounting bin location for the inventory.
This Adjustment Reason Usually Implies	Choose either Increment, Decrement, or Either Increment or Decrement.
Host Reason Codes	
Enterprise Code	Choose the enterprise code.
Host Adjustment Reason Code	Choose the host adjustment reason code. The host reason code is used to translate store reason codes to a Host Reason Code. For example, a store 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. Choose the **Create New** icon to create a new Host Adjustment Reason Code, by entering Inventory Reason and its short and long descriptions.
Adjustment Sequence	
Adjustment Sequence	Displays the sequence or priority number of the locations or zones for adjustment. 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.
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.

Delete an Inventory Adjustment Reason

About this task

To delete an inventory adjustment reason:

Procedure

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

Synchronize the Model Store Followers

About this task

You can use this wizard to synchronize processes of all the followers of a model store.

To synchronize followers of a model store:

Procedure

1. Log in to the Sterling Store Inventory Management as the Enterprise user.
2. From the menu bar, select Configuration > Launch Sterling Store Inventory Management Configurator. The Sterling Store Inventory Management Configurator displays.
3. From the Configuration Setup screen, select Configure Store Processes > Synchronize Followers Of A Model Store. The Synchronize Model Store screen displays.
4. Select a model store from the drop-down list and click Synchronize. The processes of all the follower stores under the selected model store are synchronized.

Chapter 17. Configuring Store Specific Tasks

You can configure the following tasks for a store belonging to a particular enterprise.

Defining Store Users

You can define the user of a store belonging to the enterprise. A user is a single person assigned with a certain task, such as, Hub Administrator or store manager, depending on what role the user plays in the organization.

For more information about defining users, see the *Sterling Selling and Fulfillment Foundation: Configuration Guide*.

Configuring Store Devices

You can configure store devices such as printers, weighing scale, and so forth.

For more information about defining a device type, see the *Sterling Selling and Fulfillment Foundation: Configuration Guide*.

Configuring Store Print Documents

You can configure the print documents pertaining to a store such as receiving worksheet, cycle count worksheet, and so forth.

For more information about defining print documents, see the *Sterling Selling and Fulfillment Foundation: Configuration Guide*.

Configuring Store Count Strategy

This configuration allows you to configure the count strategy for a store. Count strategy is a method defined to perform the count task.

For more information about defining count strategy, refer to the topic, "Defining Count Strategy" on page 108.

Set Up a Count Strategy

About this task

To create a count strategy:

Procedure

1. From the tree in the application rules side panel, choose Inventory > Count > Count Execution > Count Strategy. The Count Strategy Search window displays.
2. In the Count Strategy Search window, choose the **Create New** icon. The Count Strategy Details pop-up window displays.
3. Enter information in the applicable fields.
4. Choose the **Save** icon.

Description of Count Strategy Details Pop-up Window

The following table lists the fields and descriptions of the Count Strategy Details Pop-up window.

Table 74. Count Strategy Details Pop-up Window

Field	Description
Activity Group	Activity group 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 identifier for the count strategy. This defines the transaction id of the count request. **Note:** • For Transaction Id **Create Count Task 7.9** and **Create Recount Task 7.9**, all task types will be shown. • For Transaction Id **Create Variance Tasks 7.9**, only task types that have "Capturing Inventory Attributes in Mandatory" enabled will be shown.
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. **Note:** This drop-down field displays only when a transaction ID is selected.
Request Type	**This defines the request type for the count. Typical values are Cycle Count and Physical Count.**
Item Classification	**This defines the item classification attributes for determining the count strategy.** **A maximum of three item classifications can be defined.** An example, Product Line is shown below.
Task Type	Select the task type you want to use to count. **Note:** This field displays only when you select a transaction identifier suffixed with 7.9. **Note:** For Transaction Id **Create Variance Tasks 7.9**, only task types that have "Capturing Inventory Attributes in Mandatory" enabled will be shown.
Put Location on count even if No Inventory	**Select if** 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. **Note:** Honored only if the count request is at Zone or Node level. This is not applicable to count requests for a location, location range, aisle, bay or level.

Modify a Count Strategy

About this task

Once a count strategy has been created, it can be modified.

To modify a count strategy:

Procedure

1. From the tree in the application rules side panel, choose Inventory > Count > Count Execution > Count Strategy. The Count Strategy Search window displays.
2. Enter applicable search criteria, and choose the **Search** icon.
3. A list of Count Strategies displays in the Count Strategies panel.
4. Select the Count Strategy to be modified. Choose the **Details** icon.
5. The Count Strategy Details pop-up window displays.
6. Enter information in the applicable fields.
7. Choose the **Save** icon.

Results

All modifications are effective for future transactions only.

Description of Count Strategy Details Pop-up Window

The following table lists the fields and descriptions of the Count Strategy Details Pop-up window.

Table 75. Count Strategy Details Pop-up Window

Field	Description
Activity Group	Activity group 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 identifier for the count strategy. This defines the transaction id of the count request. **Note:** • For Transaction Id **Create Count Task 7.9** and **Create Recount Task 7.9**, all task types will be shown. • For Transaction Id **Create Variance Tasks 7.9**, only task types that have "Capturing Inventory Attributes in Mandatory" enabled will be shown.

Table 75. Count Strategy Details Pop-up Window (continued)

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. **Note:** This drop-down field displays only when a transaction ID is selected.
Request Type	**This defines the request type for the count. Typical values are Cycle Count and Physical Count.**
Item Classification	**This defines the item classification attributes for determining the count strategy.** **A maximum of three item classifications can be defined.** An example, Product Line is shown below.
Task Type	Select the task type you want to use to count. **Note:** This field displays only when you select a transaction identifier suffixed with 7.9. **Note:** For Transaction Id **Create Variance Tasks 7.9**, only task types that have "Capturing Inventory Attributes in Mandatory" enabled will be shown.
Put Location on count even if No Inventory	**Select if** 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. **Note:** Honored only if the count request is at Zone or Node level. This is not applicable to count requests for a location, location range, aisle, bay or level.

Delete a Count Strategy

About this task

To delete a count strategy:

Procedure

1. From the tree in the application rules side panel, choose Inventory > Count > Count Execution > Count Strategy. The Count Strategy Search window displays.
2. Enter applicable search criteria, and choose the **Search** icon.
3. A list of Count Strategies displays in the Count Strategies panel.
4. Select the Count Strategy to be deleted.
5. Choose the **Delete** icon.

Configuring Transfer Order Receiving Disposition Codes

You can define disposition codes for a transfer order when receiving items.

Create a Receiving Disposition for Transfer Order

About this task

To create a receiving disposition:

Procedure

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 displays.
3. In the Receiving Disposition : Transfer Order window, choose the **Create New** icon. The Disposition Details pop-up window displays.
4. Enter information in the applicable fields.
5. Choose the **Save** icon.

Description of Disposition Details Pop-up Window

Table 76. 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.
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.

Create a New Receiving Disposition From an Existing Receiving Disposition for Transfer Order

About this task

To create a new receiving disposition from an existing receiving disposition:

Procedure

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 displays with the list of Receiving Dispositions.
3. Choose the Receiving Disposition to be copied from. Choose the **Save As...** icon. The Disposition Details pop-up window displays.
4. Enter information in the applicable fields.
5. Choose the **Save** icon.

Description of Disposition Details Pop-up Window

Table 77. 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.
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.

Modify a Receiving Disposition for Transfer Order

About this task

Once a Receiving Disposition has been created, it may be modified.

To modify a receiving disposition:

Procedure

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 displays with the list of Receiving Dispositions.
3. Select the Receiving Disposition to be modified. Choose the **Details** icon. The Disposition Details pop-up window displays.
4. Enter information in the applicable fields.
5. Choose the **Save** icon.

Description of Disposition Details Pop-up Window

Table 78. 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.

Table 78. Disposition Details Pop-up Window (continued)

Field	Description
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.
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.

Delete a Receiving Disposition for Transfer Order

About this task

To delete a receiving disposition:

Procedure

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 displays with the list of Receiving Dispositions.
3. Select the Receiving Disposition to be deleted.
4. Choose the **Delete** icon.

Defining Disposition Codes for Purchase Order

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.

Create a Receiving Disposition Code for Purchase Order

About this task

To create a receiving disposition code:

Procedure

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 displays.
3. Enter information in the applicable fields.
4. Choose the **Save** icon.

Description of Receiving Disposition : Purchase Order Window

Table 79. Receiving Disposition : Purchase Order Window

Field	Description
Disposition Code	The disposition code displays.
Description	The description associated with the disposition code displays.
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.

Modifying a Receiving Disposition Code for Purchase Order

About this task

Once a Receiving Disposition Code has been created, it can be modified.

To modify a receiving disposition code:

Procedure

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 displays with the list of existing dispositions.
3. Enter information in the applicable fields.
4. Choose the **Save** icon.

Results

Only the inventory status associated with the disposition may be modified. The change of inventory status is applied to all future transactions.

Description of Receiving Disposition : Purchase Order Window

Table 80. Receiving Disposition : Purchase Order Window

Field	Description
Disposition Code	The disposition code displays.
Description	The description associated with the disposition code displays.

Table 80. Receiving Disposition : Purchase Order Window (continued)

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 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.

Defining Receiving Preference for Transfer Order

The receiving preference configuration manages the receiving process of a store.

A receiving preference identifies the characteristics of inbound shipments and provides guidelines to the execution transactions.

Create a Receiving Preferences for Transfer Order

About this task

To create a receiving preference:

Procedure

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 displays.
3. Enter information in the applicable fields.
4. Choose the **Save** icon.

Description of Receiving Preferences : Transfer Order Window

Table 81. Receiving Preferences : Transfer Order Window

Field	Description
Shipment Entry Allowed	Select if shipment entry is to be created when a particular shipment is not available on the system. 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. On creation and confirmation of the shipment, the "Include in Receipt" transaction is invoked, to enable the receiving process to be carried out on this receipt. Stores that receive shipment information in fax or email form can manually enter the information into the system. This allows for enhanced tracking and visibility.

Table 81. Receiving Preferences : Transfer Order Window (continued)

Field	Description
Build Pallet	
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.
Build Case	
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.
Disposition Code	
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.
Preference for Receipt Closure by Agent	
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 stores that indicate availability only when inventory is putaway to their storage locations.
Vendor Preferences	Populated automatically from vendor preferences in Sterling 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 the *Sterling Selling and Fulfillment Foundation: Supply Collaboration Configuration Guide*.
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.

Table 81. Receiving Preferences : Transfer Order Window (continued)

Field	Description
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 is updated in Sterling Supply Collaboration. 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 Sterling Supply Collaboration displays here. For more information, see the *Sterling Selling and Fulfillment Foundation: 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.

Modify a Receiving Preference for Transfer Order

About this task

Once a Receiving Preference has been created, it can be modified.

To modify a receiving preference:

Procedure

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 displays with the list of existing rules.
3. Enter information in the applicable fields.
4. Choose the **Save** icon.

Results

Any modification to a receiving preference is applied to all future transactions.

Description of Receiving Preferences : Transfer Order Window

Table 82. Receiving Preferences : Transfer Order Window

Field	Description
Shipment Entry Allowed	Select if shipment entry is to be created when a particular shipment is not available on the system. 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. On creation and confirmation of the shipment, the "Include in Receipt" transaction is invoked, to enable the receiving process to be carried out on this receipt. Stores that receive shipment information in fax or email form can manually enter the information into the system. This allows for enhanced tracking and visibility.
Build Pallet	
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.
Build Case	
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.
Disposition Code	
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.
Preference for Receipt Closure by Agent	
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 stores that indicate availability only when inventory is putaway to their storage locations.

Table 82. Receiving Preferences : Transfer Order Window (continued)

Field	Description
Vendor Preferences	Populated automatically from vendor preferences in Sterling 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 the *Sterling Selling and Fulfillment Foundation: Supply Collaboration Configuration Guide*.
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 is updated in Sterling Supply Collaboration. 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 Sterling Supply Collaboration displays here. For more information, see the *Sterling Selling and Fulfillment Foundation: 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.

Configuring Purchase Order Receiving Preferences

The receiving preference configuration manages the receiving process of a store.

A receiving preference identifies the characteristics of inbound shipments and provides guidelines to the execution transactions.

Create a Receiving Preference for Purchase Order

About this task

To create a receiving preference:

Procedure

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 displays.
3. Enter information in the applicable fields.
4. Choose the **Save** icon.

Description of Receiving Preferences : Purchase Order Window

Table 83. Receiving Preferences : Purchase Order Window

Field	Description
Shipment Entry Allowed	Select if shipment entry is to be created when a particular shipment is not available on the system. 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. On creation and confirmation of the shipment, the "Include in Receipt" transaction is invoked, to enable the receiving process to be carried out on this receipt. Stores that receive shipment information via fax or email can manually enter the information into the system. This allows for enhanced tracking and visibility.
Build Pallet	
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.
Build Case	
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.
Disposition Code Details	
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.
Receiving unexpected Items	
Allow receiving unexpected Items on Shipment	Select to allow receiving of unexpected items on the shipment.
Preference for Receipt Closure by Agent	
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.

Table 83. Receiving Preferences : Purchase Order Window (continued)

Field	Description
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 stores that indicate availability only when inventory is putaway to their storage locations.
Vendor Preferences	Populated automatically from vendor preferences in the Sterling 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 the *Sterling Selling and Fulfillment Foundation: Supply Collaboration Configuration Guide*.
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 is updated in Sterling Supply Collaboration. 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 Sterling Supply Collaboration display here. For more information, see the *Sterling Selling and Fulfillment Foundation: 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.

Modify a Receiving Preference for Purchase Order

About this task

Once a Receiving Preference has been created, it can be modified.

To modify a receiving preference:

Procedure

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 displays with the list of existing rules.
3. Enter information in the applicable fields.
4. Choose the **Save** icon.

Results

Any modification to a receiving preference is applied to all future transactions.

Description of Receiving Preferences : Purchase Order Window

Table 84. Receiving Preferences : Purchase Order Window

Field	Description
Shipment Entry Allowed	Select if shipment entry is to be created when a particular shipment is not available on the system. 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. On creation and confirmation of the shipment, the "Include in Receipt" transaction is invoked, to enable the receiving process to be carried out on this receipt. Stores that receive shipment information via fax or email can manually enter the information into the system. This allows for enhanced tracking and visibility.
Build Pallet	
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.
Build Case	
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.
Disposition Code Details	
Disposition Code for Receipt with QC	Choose the disposition code to associate with receipts for vendors or shipments that require QC.

Table 84. Receiving Preferences : Purchase Order Window (continued)

Field	Description
Disposition Code for Receipt without QC	Choose the disposition code to associate with receipts for vendors or shipment that do not require QC.
Receiving unexpected Items	
Allow receiving unexpected Items on Shipment	Select to allow receiving of unexpected items on the shipment.
Preference for Receipt Closure by Agent	
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 stores that indicate availability only when inventory is putaway to their storage locations.
Vendor Preferences	Populated automatically from vendor preferences in the Sterling 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 the *Sterling Selling and Fulfillment Foundation: Supply Collaboration Configuration Guide*.
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 is updated in Sterling Supply Collaboration. 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 Sterling Supply Collaboration display here. For more information, see the *Sterling Selling and Fulfillment Foundation: 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.

Create a Receiving Disposition for Purchase Order

About this task

To create a receiving disposition:

Procedure

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 displays.
3. In the Receiving Disposition : Purchase Order window, choose the **Create New** icon. The Disposition Details pop-up window displays.
4. Enter information in the applicable fields.
5. Choose the **Save** icon.

Description of Disposition Details Pop-up Window

Table 85. 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.
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.

Create a New Receiving Disposition From an Existing Receiving Disposition for Purchase Order

About this task

To create a new receiving disposition from an existing receiving disposition:

Procedure

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 displays with the list of Receiving Dispositions.
3. Choose the Receiving Disposition to be copied from. Choose the **Create New** icon. The Disposition Details pop-up window displays.
4. Enter information in the applicable fields.
5. Choose the **Save** icon.

Description of Disposition Details Pop-up Window

Table 86. 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.
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.

Modify a Receiving Disposition for Purchase Order

About this task

Once a Receiving Disposition has been created, it may be modified.

To modify a receiving disposition:

Procedure

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 displays with the list of Receiving Dispositions.
3. Select the Receiving Disposition to be modified. Choose the **Details** icon. The Disposition Details pop-up window displays.
4. Enter information in the applicable fields.
5. Choose the **Save** icon.

Description of Disposition Details Pop-up Window

Table 87. 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.
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.

Delete a Receiving Disposition for Purchase Order

About this task

To delete a receiving disposition:

Procedure

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 displays with the list of Receiving Dispositions.
3. Select the Receiving Disposition to be deleted.
4. Choose the **Delete** icon.

Configuring Data Security

Data security groups are used to control access to data by the users. If a user is not associated with a data security group, the user is considered to have default access.

For more information about defining data security groups, see the *Sterling Selling and Fulfillment Foundation: Configuration Guide*.

Configuring Barcodes

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 barcode 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 barcode 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 barcode 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.

The system supports all barcode symbologies through the use of RF scanners. The barcode data captured through the RF is compared to a data source in Sterling Store Inventory Management for validation. This is achieved through the use of a barcode type and translation definition.

The subsequent sections describe the following tasks:

- Defining Barcode Types
- Defining Barcode Translation

Defining Barcode 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 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.

The default set of bar code types are as follows:

- Batch
- Cart Build
- Cart Location
- Case or Pallet
- Equipment Id
- Inventory Case
- Inventory Container
- Inventory Inquiry
- Inventory Pallet
- Item
- Item or Case
- Item or Inventory Case
- Item or Inventory Container
- Item or Shipping Container
- Item Tag
- Location

- cLocation Bar Code
- Location Or Inventory Container
- Manifest Scan Initiation
- Adhoc Move Location
- Adhoc Move Pick
- New PrePrinted License Plate
- Outbound Container
- Pack Scan Initiation
- Pack SKU Initiation
- Pack Shipping Carton
- Pack Shipping Pallet
- Pallet Build
- Pick Initiation
- Pick Into Inventory Case
- Pick Into Inventory Pallet
- Serial Or Inventory Container
- Serial Scan
- Shipment
- Shipping Carton
- Shipping Container
- Shipping Or Inventory Container
- Shipping Pallet
- Task Reference
- Tote Id
- Work Order Confirmation
- Zone Id

You can add new bar code types.

Use the bar code types setup to create and delete these custom bar code types.

Create Barcode Type

About this task

To create a bar code type:

Procedure

1. From the tree in the application rules side panel, choose System Administration > Bar Codes. The Bar Codes window displays with the existing Bar Code Types.
2. In the Bar Codes window, choose the **Add New Bar Code Type** icon. The Bar Code Type pop-up window displays.
3. Enter information in the applicable fields.
4. Choose the **Save** icon.

Table 88. **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.

Results

The new bar code type is associated directly to the data field through a dictionary.

Delete Barcode Type

About this task

To delete a bar code type:

Procedure

1. From the tree in the application rules side panel, choose System Administration > Bar Codes. The Bar Codes window displays with the existing Bar Code Types.
2. In the Bar Codes window, choose the Bar Code Type to be deleted.
3. Choose the **Delete BarCode Type** icon.

Results

You cannot delete the default bar code types.

Defining Barcode Translation

Bar Code Translation defines how a bar code is validated.

In addition to the default bar code validations, additional validations can be created using the Service Definition Framework.

You can create a new bar code translation association or create a new bar code translation association from an existing association. You can also modify, move, or delete a bar code translation association.

Create New Barcode Translation Association

About this task

To create a new bar code translation association:

Procedure

1. From the tree in the application rules side panel, choose System Administration > Bar Codes. The Bar Codes window displays 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 **Add BarCode Source** icon. The Bar Codes pop-up window displays.

4. Enter information in the applicable fields.
5. Choose the **Save** icon.

Table 89. **Bar Codes Pop-up Window**

Field	Description
Bar Code Type	The bar code type is populated automatically based on the bar code type selected. **Note:** 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. In addition, an alias 'UPCCode' should be defined, and a value for this alias should be provided in 'Other Attributes' tab in 'Item Details' screen.
Description	Enter a description for the bar code translation being created.
Translation Sequence	Enter a translation sequence number for the bar code translation. Translation sequence defines the sequence of translations of a bar code for a given bar code type. 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.
Variable Length Code	Select if the bar code length is not fixed 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.
Application Identifier	Enter the application identifier. 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. The remainder of the bar code is used to validation against the source specified.
Fixed Length Bar Code Attributes	
Code Length	Enter the length of the bar code. Code length is the length of the entire stream that is scanned. Consider for example, a barcode "K6789". The length of this barcode is 5. This is because the Start Position is the one where the application identifier, "K", is located, and the End Position is the one where the last digit of the bar code, "9", is located. Code length is used to identify a bar code when validating scanned data. This is, however, not applicable for bar codes having variable lengths.

Table 89. **Bar Codes Pop-up Window** *(continued)*

Field	Description
Start Position	Enter the Start Position of the bar code. This is not applicable for bar codes having variable lengths. As mentioned earlier, the length that is to be configured is inclusive of the application identifier. For example, for barcode "K6789", the Start Position should be entered as 1 because "K" is the application identifier here, and the Start Position is considered to be the position in which "K" is placed. However, the application identifier is not displayed as part of the Case/Pallet ID. When taken in the context of this example, it means that on scanning "K6789", only "6789" is displayed.
End Position	Enter the End Position of the bar code. This defines the section of the bar code that is to be validated. For example, for barcode "K6789", the End Position should be entered as 5. This is because the last digit's position is considered to be the End Position.
Bar Code Validation Source	Choose the validation source for the bar code. Bar code validation source represents the data to be validated against. For example, a bar code representing a UPC Case code for an item has a data source of UPC Case Code. A location bar code being scanned has location id as its data source or a distinct location bar code. 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 Service Definition Framework.
Alias Type	Choose the alias type for the bar code. This applies when the validation source is 'ItemAlias'. A list of defined item alias displays here from the catalog. An example is UPC Code.
Validation Service	Choose the validation service for external validation of the barcode. This applies when a validation source of 'External Source' is chosen. A list of service flows defined in Service Definition Framework are displayed. **Note:** This service needs to support the same input and output XML structure as the translateBarCode API. For more information, see the *Sterling Selling and Fulfillment Foundation: Javadocs*.

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.

Note: 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 the *Catalog Management: Configuration Guide*.

Note: For container SCM, the UCC128 validation source checks compliance against the industry standards.

Create New Barcode Translation Association from Existing Barcode Translation Association

About this task

To create a new bar code translation association from an existing bar code translation association:

Procedure

1. From the tree in the application rules side panel, choose System Administration > Bar Codes. The Bar Codes window displays 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 displays.
4. Choose the Bar Code Translation to be copied. Choose the **Save As...** icon.
5. The Bar Code Translations pop-up window displays.
6. Enter information in the applicable fields.
7. Choose the **Save** icon.

Modify Barcode Translation Association

About this task

Once a Bar Code Translation Association has been created, it can be modified.

To modify a bar code translation association:

Procedure

1. From the tree in the application rules side panel, choose System Administration > Bar Codes. The Bar Codes window displays 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 displays.
4. Choose the Bar Code Translation to be modified. Choose the **BarCode Source Details** icon.
5. The Bar Code Translations pop-up window displays.
6. Enter information in the applicable fields.
7. Choose the **Save** icon.

Results

It is recommended that you use the "Save As" feature to re-create new translations, and modify them.

Move Barcode Translation Association

About this task

A Bar Code Translation Association can be moved up or moved down depending on the requirements.

To move a bar code translation association:

Procedure

1. From the tree in the application rules side panel, choose System Administration > Bar Codes. The Bar Codes window displays 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 displays.
4. Choose the Bar Code Translation to be moved.
5. Choose the **Up Arrow** icon to move the Bar Code Translation up.
6. Choose the **Down Arrow** icon to move the Bar Code Translation down.

Results

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 store.

For example, stores 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.

Delete Barcode Translation Association

About this task

To delete a bar code translation association:

Procedure

1. From the tree in the application rules side panel, choose System Administration > Bar Codes. The Bar Codes window displays 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 displays.
4. Choose the Bar Code Translation to be deleted.
5. Choose the **Delete BarCode Source** icon.

Results

It is recommended that you do not delete the supplied translations. The translations may instead be moved to the end of the translation sequence.

Chapter 18. Template Based Configuration

During onboarding of a store, the store and enterprise configurations need to be copied for a store to run successfully. This is termed as template based copying.

The templates are located in the `<INSTALL_DIR>\template\com.yantra.sop\StoreConfigurator` directory.

The following tables need to be copied:

- Inventory Status
- Inventory Status Transition
- Node Disposition Code
- Node Receiving Preferences
- Count Strategy
- Count Task Type
- Count Request
- Count Cancellation Reasons
- Adjustment Reason Codes
- Adjustment Host Reason Codes
- Barcode Translation
- Rules
- Common Codes

Once the store is brought onboard, the onboardStore servlet is invoked. The store and store's enterprise are obtained from the model store. The templates for onboarding are obtained from `<INSTALL_DIR>\template\com.yantra.sop\StoreConfigurator` file.

The templates should be converted into an entity loadable format. The entity xmls should then be loaded using an entity loader.

Chapter 19. Changing the Number of Records that Display in the Search Screens

When you enter the search criteria and click the Search button, by default, the Sterling Store Inventory Management displays only 30 records. To view the remaining records, you must click the More Results button.

To fetch the desired number of records, in the `yfs.properties` file, add the yfs.rcp.ui.pagesize property after the yfs.ui.maxrecords property.

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