

Genpact Deduction Management Configuration

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Overview

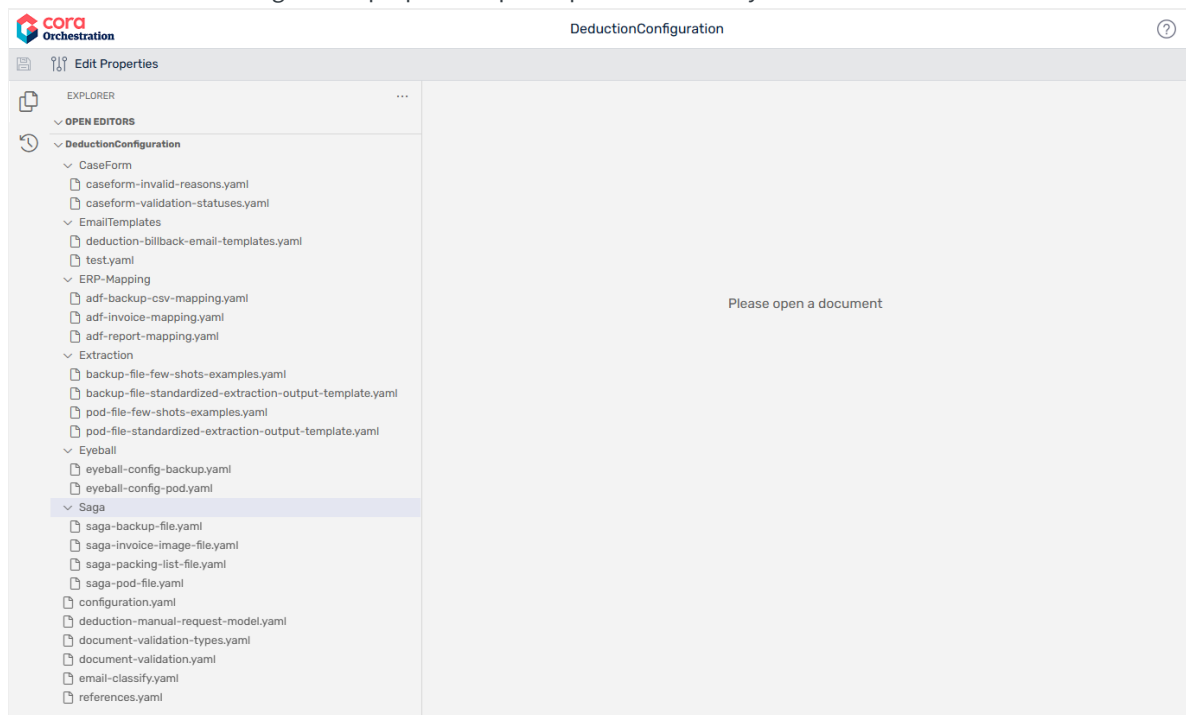
For Genpact Deduction Management, the configuration includes defining the saga steps and configuring a YAML file each for all the saga steps like extraction, eyeball and validation in a workspace.

The configuration of each workspace is defined as a ConfigSet in the Administration site. The basic configuration is available out-of-the-box (*DeductionConfiguration*). However, a user with access to the Administration site and rights to modify can update the configuration per requirement.

Create a ConfigSet

1. In the Administration site, go to **Administration>Global Settings>ConfigSets**.
2. Copy the *DeductionConfiguration*, to create a new ConfigSet for a workspace.
3. Edit the new ConfigSet to make changes.

The window to edit configuration properties opens up in a new tab in your browser window.



Each YAML file is a configuration file for different steps.

4. Click a YAML file to open and update the parameters per requirement.

Following is the list of configuration files defined in a ConfigSet:

Configuration file	Description
CaseForm caseform-invalid-reasons.yaml	Configures the reasons for which a case form is marked invalid in the portal.
CaseForm caseform-validation-statuses.yaml	Configures the validation status for a case form in the portal.

Configuration file	Description
configuration.yaml	Configures the basic OpenAI and DocIntel extraction connection configuration.
deduction-manual-request-model.yaml	Configures the fields to translate the extracted and stored data (from JSON) to an XML or a JSON file.
document-validation-types.yaml	Configures the DB fields to be used in validation rules.
document-validation.yaml	Configures the validation rules for header and line items.
email-classify.yaml	Configures the email classification criteria.
EmailTemplates deduction-billback-email-templates.yaml	Configures the billback email templates for deductions.
ERP-Mapping adf-backup-csv-mapping.yaml	Configure back up file mapping to the system.
ERP-Mapping adf-invoice-mapping.yaml	Configure invoice mapping to the system.
ERP-Mapping adf-report-mapping.yaml	Configure ERP report mapping to the system.
Extraction backup-file-standardized-extraction-output-template.yaml	Configures standard extraction file template or the system schema, the fields that will be translated to JSON from the backup file data extracted by the DocIntel and using OpenAI GPT 4.0 model.
Extraction pod-file-standardized-extraction-output-template.yaml	Configures the fields that will be translated to JSON from the POD file data extracted by the DocIntel and using OpenAI GPT 4.0 model.
Eyeball eyeball-config-backup.yaml	Configures which backup file fields will be visible in the eyeball page in the UI and how.
Eyeball eyeball-config-pod.yaml	Configures which POD file fields will be visible in the eyeball page in the UI and how.
references.yaml	Configures the reference terms existing in the email subject based on which the emails are classified and response is sent to the relevant case.
Saga saga-backup-file.yaml	Configures the order steps of the Genpact Deduction Management process for backup files. You can define the order in which you want to execute the steps and the steps that you want to skip.
Saga saga-invoice-image-file.yaml	Configures the order steps of the Genpact Deduction Management process for the invoice images. You can define the order in which you want to execute the steps and the steps that you want to skip.

Configuration file	Description
Saga saga-packing-list-file.yaml	Configures the order steps of the Genpact Deduction Management process for the packing list. You can define the order in which you want to execute the steps and the steps that you want to skip.
Saga saga-pod-file.yaml	Configures the order steps of the Genpact Deduction Management process for the POD files. You can define the order in which you want to execute the steps and the steps that you want to skip.

Connect a ConfigSet to a workspace

1. In the Administration site, go to **Administration>Lookup Table>Deduction DataModel**.
2. For **Tenants**, create a new record with a specific name.
3. For **TenantWorkspaces**, create a new record and add the following details:
 - o Name: A unique name.
 - o Description: A short description of the workspace.
 - o Slug: The name of the workspace.
 - o ConfigSetId: The ID of the ConfigSet created for the specific workspace. Copy the ID from the ConfigSet (**Administration>Global Settings>ConfigSets**), and paste here.