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# Actions

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## Buyer and Supplier Reference Guide

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# Buyer Actions

**Buyer Actions**

	<b>Release</b> Manually release Cards that have been consumed. Depending on how the system is set up a Card will be considered consumed when the box/bin is either opened or emptied		<b>Set PO</b> Set P.O. details for the Cards. You will see a list of Cards that are waiting for the P.O. details to be set and you can select the ones to set the P.O. data
	<b>Receive</b> Receive Cards as they arrive. You will see a list of Cards that are in transit and you can select the ones to receive		<b>Approve</b> Approve Cards located at the receiving dock. You will see a list of Cards that are in the receiving dock and you can select the ones to approve
	<b>Buyer Queue</b> Shows distribution of Card States for each Item		<b>Recall</b> If you accidentally marked a Card as consumed. You can undo that transaction here
	<b>Reschedule</b> Change Required date for the orders. You will see a list of Cards that can be rescheduled and you can select the ones to reschedule		<b>BulkPrint</b> View a list of all Cards on hand. If necessary you can also reprint Card labels
	<b>Move Location</b> Move Card to different location. You will see a list of all on hand Cards and you select the ones to be moved to different location		<b>Adjust Inventory</b> Issue or Transfer Inventory. You will see a list of all on hand Cards where it can be Issued in small lots or Transferred to different location all together
	<b>Virtual Kanban Approve</b> Approve Virtual Kanban Cards. You will see a list of all Cards waiting for Virtual Kanban Approval and you can select the ones to approve and place the order		<b>Approve Supplier Reschedule Request</b> Approve supplier reschedule requested Cards. You will see a list of all Cards waiting for Approval and you can select the ones to approve
	<b>Spike Orders</b> Manually create one time orders		<b>CallOff</b> If you have blocked shipment of Cards from supplier. Use this screen to unblock the Cards.
	<b>Send Email For Print</b> View the list of acknowledged Cards. Use this screen to send an email to supplier for printing kanban label		<b>Add Notes</b> Add notes to one or more Cards in cycle

## Key points on documentation structure:

*The screen shot shown in each "Purpose" is what the users will see when they click on the Action screen above*

*There may be multiple screens depending on the level of details. The follow up screen is the result of button clicked on the previous screen. For e.g. Clicking on "Show Cards" button transitions the user from the "Item List" screen to "Card List" screen.*

*The screen shot shown in each "Results" is the response screen in Ultriva for the action taken*

*The screen shot shown in each "Exceptions" highlights the exceptions if any*

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## Release

### Purpose:

This action represents release of the signal for replenishment of Kanban. This action is performed via a scan of the barcode on the Kanban label or manually through a screen.

This action is performed as a result of a consumption of a lot size (box or pallet or roll) of materials. The release signal can be triggered when the first piece is consumed or when the last piece is consumed depending on the business process.

### Release Items List

[Filters](#) [Views](#) [How do I?](#)

Supplier

Cards

Show

Category

RYG

Filter By  Select Operator  Enter Value

Find Item

RYG	Item	Description	Total Cards	Total Qty
	003-0815-00	Lower Bearing Plate	40	59,750.00
	003-0816-00	Lower Bearing Plate	65	130,000.00
	003-1287-00	Lower Bearing Plate	23	24,472.00

### Release Cards List

[Views](#) [How do I?](#)

Find Card ID

	Card ID	Item	Description	CycleNo	Qty On Card	Card Qty	Location Code	Last Received	Supplier
<input type="checkbox"/>	KCS3RS5CNA9S	003-0815-00	Lower Bearing Plate	1	1,500.00	1,500		03/17/2011	Bettcher Mexico
<input type="checkbox"/>	KCS3RS6CNASQ	003-0815-00	Lower Bearing Plate	1	1,500.00	1,500		03/17/2011	Bettcher Mexico
<input type="checkbox"/>	KCS3RS7CNA5M	003-0815-00	Lower Bearing Plate	1	1,500.00	1,500		03/17/2011	Bettcher Mexico
<input type="checkbox"/>	KCD3FWHCNARN	003-0815-00	Lower Bearing Plate	4	1,500.00	1,500		03/17/2011	Bettcher Mexico
<input type="checkbox"/>	KCD2X7DCNALY	003-0815-00	Lower Bearing Plate	9	1,500.00	1,500		03/17/2011	Bettcher Mexico
<input type="checkbox"/>	KCD2X7GCNAFJ	003-0815-00	Lower Bearing Plate	11	1,500.00	1,500		03/17/2011	Bettcher Mexico
<input type="checkbox"/>	KCD3FWGCNAP4	003-0815-00	Lower Bearing Plate	5	1,500.00	1,500		03/17/2011	Bettcher Mexico
<input type="checkbox"/>	KCD3FWLCNAF5	003-0815-00	Lower Bearing Plate	5	1,500.00	1,500		03/17/2011	Bettcher Mexico
<input type="checkbox"/>	KCD3FW7CNAKY	003-0815-00	Lower Bearing Plate	5	1,500.00	1,500		03/17/2011	Bettcher Mexico
<input type="checkbox"/>	KCD3FWJCNAMZ	003-0815-00	Lower Bearing Plate	5	1,500.00	1,500		03/17/2011	Bettcher Mexico

Sorted by: Item, Last Received 1 to 10 of 40

### Results:

This action results in an electronic signal to the supplier of that Item. The supplier could be internal upstream work center, supermarket or a warehouse or an external supplier. If the application is

integrated with the business system (ERP or MRP), then a purchase order or work order or pick list will be generated as well.

Release Cards Results					<a href="#">How do I?</a>
					<a href="#">«   Back To Items</a>
Following cards were successful					
	Card ID	Item	Card Qty	Description	
	KCD3FWHCNARN	003-0815-00	1,500	Released To Bettcher Mexico.	

### Exceptions:

The signal will not be sent to the supplier on the following conditions:

- The released card is a spike card
- The Kanban loop has been resized and there are cards waiting to be deleted
- The card is already released (only in the instance of a duplicate scan)
- The card is not ready for release as it is not in the right state (only in the instance of scan)

Release Cards Results					<a href="#">How do I?</a>
					<a href="#">«   Back To Items</a>
Following cards were successful					
	Card ID	Item	Card Qty	Description	
	KCS3RS5CNA9S	003-0815-00	1,500	This is non-replenishment card and it has completed the life count, so, the Release did not take place	

## Set P.O

### Purpose:

The purpose of this action is one of the following:

1. The integration failed in creating a P.O and the user has to manually enter P.O. # for the release
2. The application is not integrated with the business system but the user wants to input a P.O. # for the release

### Result:

Both the actions listed above will result in supplier getting the P.O for replenishing the signal

### Exceptions:

None.

## Receive

### Purpose:

This action represents receiving of goods from the supplying location. This action is performed via a scan of the barcode on the Kanban label or manually through a screen.

### Receive Items List

Filters Views How do I?

Supplier:  Cards:  Show:  Category:  RYG:  Receive:

Filter By:  Select Operator:  Enter Value:

RYG	Item	Description	Total Qty	Total Cards
	003-0815-00	Lower Bearing Plate	1,500.00	1

### Receive Cards List

Views How do I?

Storage Location:

	Card ID	Item	Reqd Receive	Ship Date	Card Qty	ShipQty	Receive Qty	Storage Location	PO #
	KCD2X6TCNA5K	003-0815-00	04/04/2011	03/24/2011	1,500	1,500	<input type="text" value="1500"/>	<input type="text"/>	009047

**Result:**

This action results in the receipt of goods at the receiving dock. This will move the card to on-hand state indicating that it is ready for consumption. If the application is integrated with the business system (ERP or MRP), then this action will generate a purchase order receipt or work order close transactions.

### Receive Cards Results

How do I?

Following cards were successful

Card ID	Item	Description
KCD2X6TCNA5K	003-0815-00	Card Successfully Received.

**Exceptions:**

If the part that is being received is set to wait at the dock either for inspection or put away then the card is not moved to on hand but retained at an intermediary state called waiting at dock. The integration process is also put on hold. If the card is scanned again for receipt then it will fail. No duplicate transactions will be created

### Receive Cards Results

How do I?

Following cards failed

Card ID	Item	Description
KCD2X6TCNA5K	003-0815-00	Card to be Approved.

## Approve

### Purpose:

This action is required only for the part that is set to wait at the dock. The purpose of this action is to approve inspection or complete put away.

RYG	Item	Description	Total Qty	Total Cards
	003-0815-00	Lower Bearing Plate	3,000.00	2

Card ID	Item	Release Date	Req'd Ship	Ship Date	Req'd Receive	Receive Date	Card Qty	ShipQty	Receive Qty	Approve Qty
KCD2X6LCNAS3	003-0815-00	03/24/2011	03/31/2011	03/24/2011	04/04/2011	03/24/2011	1,500	1,500	1,500	1400
KCD2X6TCNA5K	003-0815-00	03/24/2011	03/31/2011	03/24/2011	04/04/2011	03/30/2011	1,500	1,500	1,500	1500

### Results:

If the item is waiting for inspection then the user can approve the lot in full or partial quantities. The card will then be moved to the on-hand state only for the approved quantity.

Card ID	Item	Description
KCD2X6LCNAS3	003-0815-00	Card Successfully Approved.
KCD2X6TCNA5K	003-0815-00	Card Successfully Approved.

### Exception:


The user can fully reject the entire lot, in which case the card is moved back to supplying location

### Reject Cards Results

[How do I?](#)

[Back To Items](#)

Following cards were successful

Card ID	Item	Description
 KCD2X6PCNAT8	003-0815-00	Card Successfully Rejected.

## Buyer Queue

**Purpose:**

This is largely overview screen with an option to filter and perform actions depending on the user role. The actions that can be performed are Release, Receive and Approve.

This action is primarily for visibility only.

**Results:**

The results defined for the respective actions will happen

**Exceptions:**

Exceptions defined for respective actions will happen

### Buyer Queue Items List

[Filters](#) [How do I?](#)

Supplier:  Show:  Category:  RYG:

Filter By:  Select Operator:  Enter Value:

RYG	Item	On Hand		Released		In Process		At Ship Hub		In Transit		Received At Dock		Others		Description
		Cards	Qty	Cards	Qty	Cards	Qty	Cards	Qty	Cards	Qty	Cards	Qty	Cards	Qty	
	001-0454-00	4	460.00	0	0.0	7	1,120.00	0	0.00	6	960.00	0	0.00	0	0.0	Quest Mai Bearing
	001-0456-00	0	0.00	0	0.0	15	2,400.00	0	0.00	0	0.00	0	0.00	0	0.0	Quest Mai Bearing
	001-0525-00	2	320.00	0	0.0	51	8,160.00	0	0.00	11	1,760.00	0	0.00	0	0.0	Quest Mai Bearing
	003-0815-00	37	55,250.00	7	10,500.0	6	9,000.00	2	3,000.00	1	1,500.00	1	1,500.00	0	0.0	Lower Bearing Pl
	003-0816-00	65	130,000.00	3	6,000.0	0	0.00	0	0.00	0	0.00	0	0.00	0	0.0	Lower Bearing Pl
	003-1287-00	23	24,472.00	0	0.0	0	0.00	0	0.00	0	0.00	0	0.00	0	0.0	Lower Bearing Pl
	005-0849-00	11	4,752.00	0	0.0	99	42,768.00	0	0.00	27	11,664.00	0	0.00	0	0.0	Top Cover
	020-0087-11	3	288,000.00	0	0.0	2	192,000.00	0	0.00	0	0.00	0	0.00	0	0.0	SEAL-LINI PLUG

Internet | Protected Mode



# Recall

## Purpose:

This action allows the user to recall a signal that was released. Recall could be for several reasons but the primary ones are:

- The release was done in an error
- The demand has gone down
- Change of supplier

### Recall Items List

Filters Views How do I?

Supplier:  Cards:  Show:  Category:  RYG:

Filter By:  Select Operator:  Enter Value:  Go

Find Item:  Show Cards >>

RYG	Item	Description	Total Qty	Total Cards
	003-0815-00	Lower Bearing Plate	19,500.00	13
	003-0816-00	Lower Bearing Plate	6,000.00	3

### Recall Cards List

Views How do I?

Find Card ID:

Recall | Attach Notes | Back To Items | Change Filter

	Card ID	Item	Supplier Name	PO #	Card State	Release Date	Accept Date	Reqd Ship	Card Qty
<input checked="" type="checkbox"/>	KCD2X6PCNAT8	003-0815-00	Bettcher Mexico	009047	In Process	03/24/2011	03/24/2011	03/31/2011	1,500
<input type="checkbox"/>	KCD2X6RCNAXF	003-0815-00	Bettcher Mexico	009047	Released	03/24/2011	-	03/31/2011	1,500
<input type="checkbox"/>	KCD2X6WCNAWZ	003-0815-00	Bettcher Mexico	009047	In Process	03/24/2011	03/24/2011	03/31/2011	1,500
<input type="checkbox"/>	KCD2X74CNAQ4	003-0815-00	Bettcher Mexico	009047	Released	03/24/2011	-	03/31/2011	1,500
<input type="checkbox"/>	KCD2X75CNAF9	003-0815-00	Bettcher Mexico	009047	Released	03/22/2011	-	03/29/2011	1,500
<input type="checkbox"/>	KCD2X76CNALB	003-0815-00	Bettcher Mexico	009047	Released	03/24/2011	-	03/31/2011	1,500
<input type="checkbox"/>	KCD2X7ECNABV	003-0815-00	Bettcher Mexico	009047	Released	03/22/2011	-	03/29/2011	1,500
<input type="checkbox"/>	KCD2X7FCNAQP	003-0815-00	Bettcher Mexico	009047	Released	03/24/2011	-	03/31/2011	1,500
<input type="checkbox"/>	KCD3FWACNADY	003-0815-00	Bettcher Mexico	009047	In Process	03/24/2011	03/24/2011	03/31/2011	1,500
<input type="checkbox"/>	KCD3FWBCNANJ	003-0815-00	Bettcher Mexico	009047	In Process	03/24/2011	03/24/2011	03/31/2011	1,500

Sorted by: Item, Card ID 1 to 10 of 13 Prev Page 1 Next

Recall | Attach Notes | Back To Items | Change Filter


## Results:

This action results in the card being put back in on-hand state with whatever quantity it had before its release.

### Recall Cards Results






How do I? [« | Back To Items](#)

Following cards were successful

Card ID	Item	Description
 KCD2X6PCNAT8	003-0815-00	Card Successfully Recalled.

CONFIGURATION SETTINGS AT “MY BUSINESS UNIT CONFIGURATION” WILL DETERMINE WHETHER THIS REQUIRES SUPPLIER APPROVAL OR NOT.

#### My Account

-  **Change Profile**  
View and change personal details such as name, phone, and email
-  **Change Password**  
Change login password
-  **My Preference**  
View and update preferences such as records per page
-  **My Business Unit**  
View and update businessunit details such as name, location and address
-  **My Business Unit Configuration**  
View and update businessunit preferences

### Plant Configuration for: Scroll Compressors

How do I?

General | Card | Custom | Integration | Print | Receive | Release | Scan | Ship

#### Configuration Settings

Name	Value
Call-Off for Forecast Items:	<input type="checkbox"/> OFF
Required Receive Date Calculation using Calendar Days:	<input type="checkbox"/> OFF
Buyer Reschedule should wait for Supplier Approval:	<input checked="" type="checkbox"/> ON
Buyer Recall should wait for Supplier Approval:	<input checked="" type="checkbox"/> ON
Allow operators to restart production for held jobs:	<input type="checkbox"/> OFF
Track Blanket PO Qty:	<input type="checkbox"/> OFF

\* Required field [Save | »](#) [X | Cancel](#)

**Exception:**

*The card cannot be recalled if it is already accepted by the supplier*

## Reschedule

**Purpose:**

*This action allows the buyer to reschedule an order. Buyer initiates the reschedule by requesting a date change. The Supplier then approves or rejects the date change depending on the configuration.*

### Reschedule Items List

Filters Views How do I?

Supplier: **Bettcher Mexico** Cards: **All** Show: **Items List** Category: **All** RYG: **All**

Filter By: Select Operator: Enter Value:

Find Item:

RYG	Item	Description	Total Qty	Total Cards
	003-0815-00	Lower Bearing Plate	18,000.00	12
	003-0816-00	Lower Bearing Plate	6,000.00	3

### Reschedule Cards List

Views How do I?

Find Card ID:

New Required Receive date:

	Card ID	Item	Description	Release Date	Reqd Ship	Reqd Receive	Qty On Card	Card Qty	New Reqd Receive Date
<input checked="" type="checkbox"/>	KCD2X75CNAF9	003-0815-00	Lower Bearing Plate	03/22/2011	03/29/2011	03/31/2011	1,500.00	1,500	<input type="text" value="4/12/2011"/>
<input type="checkbox"/>	KCD2X7ECNABV	003-0815-00	Lower Bearing Plate	03/22/2011	03/29/2011	03/31/2011	1,500.00	1,500	<input type="text" value="03/31/2011"/>
<input type="checkbox"/>	KCD2X74CNAQ4	003-0815-00	Lower Bearing Plate	03/24/2011	03/31/2011	04/04/2011	1,500.00	1,500	<input type="text" value="04/04/2011"/>
<input type="checkbox"/>	KCD3FWBCNANJ	003-0815-00	Lower Bearing Plate	03/24/2011	03/31/2011	04/04/2011	1,500.00	1,500	<input type="text" value="04/04/2011"/>
<input type="checkbox"/>	KCD2X76CNALB	003-0815-00	Lower Bearing Plate	03/24/2011	03/31/2011	04/04/2011	1,500.00	1,500	<input type="text" value="04/04/2011"/>
<input type="checkbox"/>	KCD2X7FCNAQP	003-0815-00	Lower Bearing Plate	03/24/2011	03/31/2011	04/04/2011	1,500.00	1,500	<input type="text" value="04/04/2011"/>
<input type="checkbox"/>	KCD3FWACNADY	003-0815-00	Lower Bearing Plate	03/24/2011	03/31/2011	04/04/2011	1,500.00	1,500	<input type="text" value="04/04/2011"/>

Sorted by: Item, Reqd Receive, Card ID 1 to 10 of 12

**Results:**

*This moves the card to a waiting for approval state and notifies the buyer to approve.*

### Reschedule Cards Results






How do I?

Following cards were successful

Card ID	Item	Description
KCD2X75CNAF9	003-0815-00	Card Successfully Rescheduled.

CONFIGURATION SETTINGS AT "MY BUSINESS UNIT CONFIGURATION" WILL DETERMINE WHETHER THIS REQUIRES SUPPLIER APPROVAL OR NOT.

**My Account**

-  **Change Profile**  
View and change personal details such as name, phone, and email
-  **Change Password**  
Change login password
-  **My Preference**  
View and update preferences such as records per page
-  **My Business Unit**  
View and update businessunit details such as name, location and address
-  **My Business Unit Configuration**  
View and update businessunit preferences

**Plant Configuration for: Scroll Compressors** ? How do I?

General | Card | Custom | Integration | Print | Receive | Release | Scan | Ship

**Configuration Settings**

Name	Value
Call-Off for Forecast Items:	<input type="checkbox"/> OFF
Required Receive Date Calculation using Calendar Days:	<input type="checkbox"/> OFF
Buyer Reschedule should wait for Supplier Approval:	<input checked="" type="checkbox"/> ON
Buyer Recall should wait for Supplier Approval:	<input checked="" type="checkbox"/> ON
Allow operators to restart production for held jobs:	<input type="checkbox"/> OFF
Track Blanket PO Qty:	<input type="checkbox"/> OFF

\* Required field Save | >> X | Cancel

**Exception:**

If the buyer fails to approve or reject then the order remains in an intermediary state that could result in a stock out for the customer.

**Approve Supplier Reschedule request**

**Purpose:**

This action is required only if the supplier requests a reschedule. The change request will be for a date change only. Buyer will have an option to approve or reject the request.

**Approve Supplier Reschedule Items List** Filters Views ? How do I?

Supplier:  Cards:  Show:  Category:  RYG:

Filter By:  Select Operator:  Enter Value:

RYG	Item	Description	Total Qty	Total Cards
<input checked="" type="checkbox"/>	003-0815-00	Lower Bearing Plate	1,500.00	1

Approve Supplier Reschedule Cards List										
Views <a href="#">How do I?</a>										
<a href="#">Approve</a>   <a href="#">Reject</a>   <a href="#">Attach Notes</a>   <a href="#">Back To Items</a>   <a href="#">Change Filter</a>										
<input type="checkbox"/>	Card ID	Item	Description	Supplier Name	Release Date	Reqd Ship	Reqd Receive	Card Qty	New Req Ship Date	New Req Receive Date
<input checked="" type="checkbox"/>	KCD3FWBCNANJ	003-0815-00	Lower Bearing Plate	Bettcher Mexico	03/24/2011	03/31/2011	04/04/2011	1,500	04/15/2011	04/19/2011

**Results:**

If the buyer approves then change then the system will update the Required Ship date to the newly approved one. If the buyer rejects the change request then the old required ship date is maintained and the card is moved back to in Process state ready for shipment.

Approve Supplier Reschedule Cards Results			
How do I?			
<a href="#">Back To Items</a>			
Following cards were successful			
Card ID	Item	Description	
KCD3FWBCNANJ	003-0815-00	Supplier Reschedule Successfully Approved.	

**Exception:**

If the buyer fails to approve or reject then the order remains in an intermediary state that could result in a stock out for the customer.

Reject Supplier Reschedule Cards Results		
How do I?		
<a href="#">Back To Items</a>		
Following cards were successful		
Card ID	Item	Description
KCD3FWACNADY	003-0815-00	Supplier Reschedule Successfully Rejected.

**Move Location:**

**Purpose:**

The purpose of this action is to allow factory floor to move lots from one location to another while keeping track of the movement in the application. The system keeps track of the most current location where the material is. This can be done only for the goods which are in on-hand state.

### Move Location Items List

Filters Views How do I?

Supplier:  Cards:  Show:  Category:  RYG:

Filter By:  Select Operator:  Enter Value:

Find Item:

RYG	Item	Description	Total Qty	Total Cards
	003-0815-00	Lower Bearing Plate	56,650.00	38
	003-0816-00	Lower Bearing Plate	130,000.00	65
	003-1287-00	Lower Bearing Plate	24,472.00	23

### Move Location Cards List

Views How do I?

Find Card ID:

<input type="checkbox"/>	Card ID	Item	CycleNo	Card Qty	Current Location	New Location	Reset Qty
<input checked="" type="checkbox"/>	KCD2QZ8CNAUG	003-0815-00	11	1,500	V-67-8990	H-567-6543	1500
<input checked="" type="checkbox"/>	KCD2QZACNA4S	003-0815-00	10	1,500	V-67-8993	H-567-6547	1500
<input type="checkbox"/>	KCD2X6LCNA53	003-0815-00	13	1,400			1400
<input type="checkbox"/>	KCD2X6MCNA56	003-0815-00	10	1,500			1500
<input type="checkbox"/>	KCD2X6NCNAWC	003-0815-00	11	1,450			1450
<input type="checkbox"/>	KCD2X6PCNAT8	003-0815-00	11	1,500			1500
<input type="checkbox"/>	KCD2X6QCNA45	003-0815-00	11	1,500			1500
<input type="checkbox"/>	KCD2X6TCNA5K	003-0815-00	11	1,500			1500
<input type="checkbox"/>	KCD2X7CCNAR9	003-0815-00	10	1,500			1500
<input type="checkbox"/>	KCD2X7DCNALY	003-0815-00	9	1,500			1500

Sorted by: Item, Card ID 1 to 10 of 38

**Results:**

Every time the goods are moved the current location overwrites the previous location.

### Move Location Cards Results

How do I?

Following cards were successful

Card ID	Item	Description
KCD2QZ8CNAUG	003-0815-00	Card Successfully Moved.
KCD2QZACNA4S	003-0815-00	Card Successfully Moved.

**Exceptions:**  
None

## Bulk Print

**Purpose:**  
This action is normally required at the time of set up.

**Bulk Print Items List** Filters Views How do I?

Supplier: All Suppliers Cards: All Show: Items List Category: All RYG: All Card State: On Hand

Filter By: Select Operator: Enter Value: Go

Find Item Show Cards >>

RYG	Item	Description	Total Cards	Total Qty
	001-0454-00	Quest Main Bearing	4	460.00
	001-0525-00	Quest Main Bearing	2	320.00
	003-0815-00	Lower Bearing Plate	38	56,650.00
	003-0816-00	Lower Bearing Plate	65	130,000.00
	003-1287-00	Lower Bearing Plate	23	24,472.00
	005-0849-00	Top Cover	11	4,752.00
	020-0087-11	SEAL-LINE PLUG	3	288,000.00
	020-0087-14	SEAL-LINE PLUG	3	180,000.00
	020-0619-00	SEAL-LINE PLUG	3	108,000.00
	021-0163-00	Fusite	2	10,206.00

Sorted by: Item 1 to 10 of 168 Prev Page 1 Next

Show Cards >>

**Bulk Print Cards List** Views How do I?

Find Card ID Print >> << Back To Items << Change Filter

	Card ID	Item	Description	Card State	CycleNo	Qty On Card	Card Qty	Location Code
<input checked="" type="checkbox"/>	KCD29AYCNA6E	001-0454-00	Quest Main Bearing	On Hand	38	160.00	160	
<input checked="" type="checkbox"/>	KCS3TNBCNA9M	001-0454-00	Quest Main Bearing	On Hand	0	160.00	100	
<input checked="" type="checkbox"/>	KCS3TNCCNAWQ	001-0454-00	Quest Main Bearing	On Hand	0	160.00	100	
<input checked="" type="checkbox"/>	KCS3TNDCNATH	001-0454-00	Quest Main Bearing	On Hand	0	160.00	100	

## Adjust Inventory

### Purpose:

The purpose is to sync up the inventory in the system with MRP or ERP inventory. Any action that is performed outside of the Ultriva applications (like Scrapping of material at the point of use or rejection of parts after the inspection or damage of goods on the floor etc.). This is done manually through screen inputs.

Adjust Inventory Items List				
Supplier	Cards	Show	Category	RYG
Bettcher Mexico	All	Items List	All	All
Filter By	Select Operator	Enter Value	Go	Action
				Adjust Inventory
Find Item <input type="text"/> <span>Show Cards   &gt;</span>				
RYG	Item	Description	Total Qty	Total Cards
<input checked="" type="checkbox"/>	003-0815-00	Lower Bearing Plate	56,650.00	38
<input checked="" type="checkbox"/>	003-0816-00	Lower Bearing Plate	130,000.00	65
<input checked="" type="checkbox"/>	003-1287-00	Lower Bearing Plate	24,472.00	23

Adjust Inventory Cards List							
Find Card ID <input type="text"/> <span>Adjust Inventory   &gt;&gt;</span> <span>Attach Notes   &gt;&gt;</span> <span>&lt;&lt;   Back To Items</span> <span>&lt;&lt;   Change Filter</span>							
<input type="checkbox"/>	Card ID	Item	CycleNo	Card Qty	Location Code	Current Location	Adjust Qty
<input checked="" type="checkbox"/>	KCD2QZ8CNAUG	003-0815-00	11	1,500	H-567-6543	H-567-6543	1424
<input checked="" type="checkbox"/>	KCD2QZACNA4S	003-0815-00	10	1,500	H-567-6547	H-567-6547	1497
<input type="checkbox"/>	KCD2X6LCNAS3	003-0815-00	13	1,400			1400
<input type="checkbox"/>	KCD2X6MCNA56	003-0815-00	10	1,500			1500
<input type="checkbox"/>	KCD2X6NCNAWC	003-0815-00	11	1,450			1450
<input type="checkbox"/>	KCD2X6PCNAT8	003-0815-00	11	1,500			1500
<input type="checkbox"/>	KCD2X6QCNA45	003-0815-00	11	1,500			1500
<input type="checkbox"/>	KCD2X6TCNA5K	003-0815-00	11	1,500			1500
<input type="checkbox"/>	KCD2X7CCNAR9	003-0815-00	10	1,500			1500
<input type="checkbox"/>	KCD2X7DCNALY	003-0815-00	9	1,500			1500
Sorted by: Item, Card ID						1 to 10 of 38	<span>Prev</span> <span>Page 1</span> <span>Next</span>
<span>Adjust Inventory   &gt;&gt;</span> <span>Attach Notes   &gt;&gt;</span> <span>&lt;&lt;   Back To Items</span> <span>&lt;&lt;   Change Filter</span>							



**Results:**

The on hand inventory in the system is adjusted by decrementing or incrementing quantities at the card level.

**Adjust Inventory Cards Results** How do I?

[« | Back To Items](#)

Following cards were successful

	Card ID	Item	Description
	KCD2QZ8CNAUG	003-0815-00	Inventory Successfully Adjusted.
	KCD2QZACNA4S	003-0815-00	Inventory Successfully Adjusted.

**Exceptions:**

None

## Spike orders

**Purpose:**

The purpose of this action is to allow the users to react to temporary increase in demand without resizing the Kanban loop. This generates a one cycle release signal to the supplier. Unlike a standard Kanban signal, this signal is destroyed when it is released again.

**Spike Order Entry** How do I?

Category:    Supplier:

Item No.	Description	Qty On Card	Number of Cards	Order Qty	PO #	PO Line #	Release #	Release Line #	Required Receive Date
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

### Spike Order Entry ? How do I?

i Entries validated successfully x

Category: Kanban Items Supplier: Bettcher Mexico

0 Add More Lines | >> Validate Entries | >> Submit Entries | >>

Item No.	Description	Qty On Card	Number of Cards	Order Qty	PO #	PO Line #	Release #	Release Line #	Required Receive Date
<span style="border: 1px solid #ccc; padding: 2px;">003-0815-00 x</span>	Lower Bearing Plate	1500	1	1500	456577	0			04/08/2011
<span style="border: 1px solid #ccc; padding: 2px;">003-0816-00 x</span>	Lower Bearing Plate	2000	1	2000	468678	0			04/08/2011
<span style="border: 1px solid #ccc; padding: 2px;"></span>									
<span style="border: 1px solid #ccc; padding: 2px;"></span>									
<span style="border: 1px solid #ccc; padding: 2px;"></span>									

0 Add More Lines | >> Validate Entries | >> Submit Entries | >>

**Results:**

*Identical to the release action details mentioned above.*

### Spike Order Entry Results ? How do I?

Back To Spike Order Entry

	Item	Card ID	Supplier	PO #	PO Line #	Release #	Release Line #	Reqd Ship	Reqd Receive	Card Qty	Status Message
<span style="color: blue;">i</span>	003-0815-00	KCD3TP6CNAQV	Bettcher Mexico	456577		0		04/06/2011	04/08/2011	1,500	Card Released
<span style="color: blue;">i</span>	003-0816-00	KCD3TP7CNAFY	Bettcher Mexico	468678		0		04/06/2011	04/08/2011	2,000	Card Released

Back To Spike Order Entry

**Exception:**

*Identical to the release action details mentioned above. In addition while releasing spike orders the required ship date can be changed. It does not have to match to the standard lead time set in the system.*

**Add Notes**

**Purpose:**

*The purpose of this action is for buyers to generate some notes to suppliers on the cards (orders). Buyers can filter the cards by where they are in the cycle (released, accepted shipped, received etc.)*

### Add Notes Items List

Filters Views How do I?

Supplier: **Bettcher Mexico** Cards: **All** Show: **Items List** Category: **All** RYG: **All** Card State: **All States**

Filter By: Select Operator: Enter Value:

Find Item:

RYG	Item	Description	Total Qty	Total Cards
	003-0815-00	Lower Bearing Plate	24,000.00	16
	003-0816-00	Lower Bearing Plate	8,000.00	4

Select card(s) and click attach notes. Select from list and click Submit.

### Add Notes Cards List

Views How do I?

Find Card ID:

	Card ID	Item	Reqd Ship	Reqd Receive	Card Qty	PO #
<input type="checkbox"/>	KCD2X7ECNABV	003-0815-00	03/29/2011	03/31/2011	1,500	009047
<input checked="" type="checkbox"/>	KCD2X6S				1,500	009047
<input type="checkbox"/>	KCD2X74				1,500	009047
<input type="checkbox"/>	KCD3FWF				1,500	009047
<input type="checkbox"/>	KCD3FWN				1,500	009047
<input type="checkbox"/>	KCD2X76				1,500	009047
<input type="checkbox"/>	KCD2X7F				1,500	009047
<input type="checkbox"/>	KCD3FWA				1,500	009047
<input type="checkbox"/>	KCD3FWM				1,500	009047
<input type="checkbox"/>	KCD2X6R				1,500	009047

**Attach notes for card: KCD2X6SCNA8A**

Priority:  Low  Medium  High

Notes:

Apply this notes to all selected cards

Sorted by: Item, Reqd Receive, Card Qty

**Results:**

The notes get attached to the card and can be viewed by other users who have access. Notification alerts can be created that can send emails to the suppliers

### Add Notes Cards Results















How do I?

Following cards were successful

Card ID	Item	Description
KCD2X6SCNA8A	003-0815-00	Notes added Successfully.

# Supplier Actions

## Supplier Actions

 <b>Accept</b> View and acknowledge new kanban orders	 <b>Ship</b> View the list of acknowledged kanban Cards. Use this screen to indicate the Cards you are shipping. If you have not printed kKanban labels already, you can do that here too
 <b>Consolidator Ship</b> View the list of acknowledged kanban Cards. Use this screen to indicate the Cards you are shipping. If you have not printed Kanban labels already, you can do that here too	 <b>Supplier Queue</b> Shows distribution of Card States for each Item
 <b>Recall</b> If you incorrectly marked a Card as shipped. Use this screen to undo the shipment transaction. You will need to know the kanban Card id to undo a shipment	 <b>Reschedule Request</b> Change required date for the orders. You will see a list of Cards that can be rescheduled and you can select the ones to reschedule
 <b>Production Sequence</b> View list of orders to complete production. Use this screen to complete production for the pending orders.	 <b>Print Cards</b> View the list of acknowledged kanban Cards. Use this screen if you want to print labels before you are ready to ship
 <b>Print Duplicate Cards</b> View the list of printed kanban Cards. Use this screen if you want to print duplicate labels	 <b>Set Tracking No.</b> View the list of shipped kanban Cards. Use this screen to update the tracking number for the shipped Cards.
 <b>Set WorkOrder No.</b> View the list of acknowledged kanban Cards. Use this screen to update the workorder number for the acknowledged Cards	 <b>Resequence Production Orders</b> View list of orders to complete production. Use this screen to resequence the orders for production
 <b>Master Label</b> Create master label for shipment	 <b>Add Notes</b> Add notes to one or more Cards in cycle

## Key points on documentation structure:

*The screen shot shown in each “Purpose” is what the users will see when they click on the Action screen above*

*There may be multiple screens depending on the level of details. The follow up screen is the result of button clicked on the previous screen. For e.g. Clicking on “Show Cards” button transitions the user from the “Item List” screen to “Card List” screen.*

*The screen shot shown in each “Results” is the response screen in Ultriva for the action taken*

*The screen shot shown in each “Exceptions” highlights the exceptions if any*

---

## Accept

### Purpose:

This action allows the supplier to accept the Kanban signal and/or Purchase order. Supplier will be able to view the P.O. prior to accepting the order. Supplier can also attach notes while accepting the order.

**Accept Items List** Filters [How do I?](#)

Plant: Scroll Compressors    Cards: All    Show: Items List    Category: All    RYG: All

Filter By:    Select Operator:    Enter Value:   

>>   
 >>   
 >   
 >>   
 >>

RYG	Supplier Item No.	Description	Wait For PO		Runline		Released		Reschedule Approval		Recall Wait		Total	
			Cards	Qty	Cards	Qty	Cards	Qty	Cards	Qty	Cards	Qty	Cards	Qty
	003-0815-00	Lower Bearing Plate	0	0.00	0	0.00	9	13,500.00	0	0.00	0	0.00	9	13,500.00
	003-0816-00	Lower Bearing Plate	0	0.00	0	0.00	4	8,000.00	0	0.00	0	0.00	4	8,000.00
<b>Total</b>			0	0.00	0	0.00	13	21,500.00	0	0.00	0	0.00	13	21,500.00

**Accept Cards List** Views [How do I?](#)

Find Card ID:   >>     >>        << |     << |

Work Order Number:

	Card ID	Supplier Item No.	Release Date	Reqd Ship	Reqd Receive	Card Qty	PO #	PO Line #	WorkOrder No.
<input checked="" type="checkbox"/>	KCD2X8LCNAD2	003-0816-00	03/22/2011	03/29/2011	03/31/2011	2,000	008312	0	BM-28909
<input checked="" type="checkbox"/>	KCD3FWRCNAAH	003-0816-00	03/22/2011	03/29/2011	03/31/2011	2,000	008312	0	BM-78989
<input type="checkbox"/>	KCD2X8TCNAJJ	003-0816-00	03/22/2011	03/29/2011	03/31/2011	2,000	008312	0	
<input type="checkbox"/>	KCD3TP7CNAFY	003-0816-00	03/30/2011	04/06/2011	04/08/2011	2,000	468678	0	

### Results:

The card (or order) moves from RELEASED to IN PROCESS state when the supplier accepts the card.

**Accept Cards Results** [How do I?](#)

Following cards were successful

Card ID	Supplier Item No.	Description
KCD2X8LCNAD2	003-0816-00	Card successfully accepted.
KCD3FWRCNAAH	003-0816-00	Card successfully accepted.

If the supplier clicks PRINIT PO button then they will be able to see the P.O. and print them.

**ULTRIVA**  
 1900 Evergreen Parkway  
 Lebanon, MO 65536  
 PHONE: (507) 847-2690

**PURCHASE ORDER**  
 468678

**VENDOR:**  
 Bettcher Mexico  
 6001 South 35th Street  
 Suite D  
 McAllen, TX 78503

**SHIP TO:**  
 Scroll Compressors  
 Lebanon  
 1900 Evergreen Parkway  
 Lebanon, MO 65536

**VENDOR CONTACT:**  
 Heidi Julian

**BILL TO:**  
 Scroll Compressors  
 Lebanon  
 1900 Evergreen Parkway  
 ATTN: ACCOUNTS PAYABLE  
 Lebanon, MO 65536

**PHONE:** 011-52-899-929-0805 ext. 3025      **FAX:**

P.O.Date	VENDOR	SHIP VIA	F.O.B	TERMS	DEL DATE
2011-03-30	70126	UPS/Concentrek		NET 30 DAYS	SEE BODY

BUYER: Jim Davis  
 PHONE # 417-588-8626      FAX # 507-847-7545

	QUANTITY	U/M	UNIT PRICE	AMOUNT
003-0816-00 Per Drawing - A Lower Bearing Plate VENDOR ITEM # 003-0816-00 Inspect Upon Receipt CARD ID # KCD3TP7CNAFY5	2000	EA	0.41	\$20.00

DUE ON DOCK 2011-04-08

**Exception:**

Customer may require the supplier to accept the orders within a specified time (24 hours or 48 hours). Noncompliance of this time line can result in a notification being generated back to the buyer.

Customer may also flag the supplier to auto accept the orders. In such cases suppliers are not required to perform this action.

Suppliers may not be able to accept the order under two conditions:

- Cards (orders) are waiting in runline (minimum order quantity) to be reached
- Cards are waiting for P.O. to be generated by the ERP system

In both such instances, supplier will have visibility to the pending orders but will not be able to Accept them

**Ship**

**Purpose:**

This action allows the suppliers to ship goods when they are ready. Only orders that are accepted by the suppliers will be allowed to ship. The supplier can ship one or multiple orders. The following data can be entered while shipping:

- Select Shipment Carrier from an approved list
- Enter the Tracking Number for the shipment
- Enter the charge number (or traceability number)
- Enter the packing slip number if necessary
- Change the ship quantity if necessary

- Attach notes or certificates if necessary
- After successful shipment, they can print the shipping label as well

### Ship Items List

Filters Views How do I?

Plant: Scroll Compressors    Cards: All    Show: Items List    Category: All    RYG: All

Filter By:    Select Operator:    Enter Value:    Go

[Show Cards | >](#)

RYG	Item	Description	Total Cards	Total Qty
003-0815-00		Lower Bearing Plate	6	9,000.00

### Ship Cards List

Views How do I?

Find Card ID:    [Ship | >>](#)    [Attach Notes | >>](#)    [<< | Back To Items](#)    [<< | Change Filter](#)

Tracking No.: 5678878889    Carrier: NON-ETD    Packing Slip No.: T-799090    Charge No.: KSG-90

Card ID	Supplier Item No.	Release Date	Reqd Ship	Reqd Receive	Card Qty	Ship Qty	Packing Slip No.	Charge No.	PO #
KCD3FWFCNAG9	003-0815-00	03/24/2011	03/31/2011	04/04/2011	1,500	1500	T-799090	KSG-90	009047
KCD3FWNCNABA	003-0815-00	03/24/2011	03/31/2011	04/04/2011	1,500	1500	T-799090	KSG-90	009047
KCD3FWBCNANJ	003-0815-00	03/24/2011	03/31/2011	04/04/2011	1,500	1500			009047
KCD3FWACNADY	003-0815-00	03/24/2011	03/31/2011	04/04/2011	1,500	1500			009047
KCD3FWMCNAQ8	003-0815-00	03/24/2011	03/31/2011	04/04/2011	1,500	1500			009047
KCD2X6WCNAWZ	003-0815-00	03/24/2011	03/31/2011	04/04/2011	1,500	1500			009047

Sorted by: Supplier Item No., Reqd Ship, Card ID    1 to 6 of 6

[Ship | >>](#)    [Attach Notes | >>](#)    [<< | Back To Items](#)    [<< | Change Filter](#)

**Results:**

Once the shipment is successful, the system takes the user to print label screen. A successful shipment will move the order from In Process to In Transit stage.

Ship Cards Results					<a href="#">How do I?</a>
					<a href="#">«   Back To Items</a>
<b>2 card(s) have been shipped without printing. Please immediately print the card(s) by clicking Print Cards button</b>					
	<input type="checkbox"/>	Card ID	Supplier Item No.	Description	Printed
	<input type="checkbox"/>	KCD3FWFCNAG9	003-0815-00	Card Successfully Shipped and Not Printed.	No
	<input type="checkbox"/>	KCD3FWNCNABA	003-0815-00	Card Successfully Shipped and Not Printed.	No
<a href="#">Print Cards   &gt;</a>					

**Exception:**

*If Consolidator Ship flag is enabled, then the order is moved from In Process to “Consolidator ship” instead of “In Transit”.*

## Consolidator ship

**Purpose:**

*Some customers use consolidators for supplier shipment. When the Item is mapped to a supplier, a flag can be set in Ultriva which identifies that the supplier shipments for that part will be consolidated. It lets the supplier to indicate that the goods are ready for pick up by shipping the goods in Ultriva. The flag retains the order in the consolidator ship state till it is picked up by consolidators and moved to In Transit stage. This action can be performed manually or through a scanner*

**Results:**

*This action moves the order from Consolidator ship to In Transit state.*

**Exception:**

*If Consolidator Ship action is not completed while picking up shipped goods, the orders cannot be received at the dock.*

## Supplier Queue

**Purpose:**

*This is a report of items that the supplier is supplying. It shows the current states of all the associated cards/orders for each item.*



### Supplier Queue Items List

Filters How do I?

Plant: Scroll Compressors Show: Items List Category: All RYG: All

Filter By: Select Operator: Enter Value: Go

RYG	Supplier Item No.	Description	Min Order Cards	On Hand		Released		In Process		At Ship Hub		In Transit		Received At Dock		Other
				Cards	Qty	Cards	Qty	Cards	Qty	Cards	Qty	Cards	Qty	Cards	Qty	
	003-0815-00	Lower Bearing Plate	0	38	56,571.00	9	13,500.00	3	4,500.00	1	1,500.00	2	3,000.00	1	1,500.00	0
	003-0816-00	Lower Bearing Plate	0	65	130,000.00	2	4,000.00	2	4,000.00	0	0.00	0	0.00	0	0.00	0
	003-1287-00	Lower Bearing Plate	0	23	24,472.00	0	0.00	0	0.00	0	0.00	0	0.00	0	0.00	0

**Results:**

None

**Exception:**

None

## Recall

**Purpose:**

This action allows the supplier to recall an order if it is wrongly shipped. When clicked it shows the filter condition to search and then list the items for which cards/orders that have been shipped but not yet received. Supplier can select the item and see all the cards/orders. They can select one or more cards/orders and recall them.

### Recall Items List

Filters Views How do I?

Plant: Scroll Compressors Cards: All Show: Items List Category: All RYG: All

Filter By: Select Operator: Enter Value: Go

Show Cards >>

RYG	Item	Description	Total Cards	Total Qty
	003-0815-00	Lower Bearing Plate	2	3,000.00

### Recall Cards List

Views How do I?

Find Card ID

	Card ID ▲	Supplier Item No. ▲	Release Date ▼	Reqd Ship ▲	Reqd Receive ▼	Card Qty ▼	ShipQty ▼	PO # ▼	PO Line # ▼	Release # ▼	Release Line # ▼
	KCD3FWFCNAG9	003-0815-00	03/24/2011	03/31/2011	04/04/2011	1,500	1,500	009047	0		
	KCD3FWNCNABA	003-0815-00	03/24/2011	03/31/2011	04/04/2011	1,500	1,500	009047	0		

**Results:**

The Card/Order will be moved back from In Transit (or Consolidator Ship) to In Process state

### Recall Cards Results

How do I?

Following cards were successful

Card ID	Supplier Item No.	Description
KCD3FWFCNAG9	003-0815-00	Card Successfully Recalled.

**Exception:**

If the card is already received, it cannot be recalled.

## Reschedule Request

**Purpose:**

Supplier can request a reschedule of an order via Ultriva. Only a date change for Required Ship Date is allowed. When Supplier requests this, a notification is sent to the buyer to approve or reject.

### Reschedule Request Items List

Filters Views How do I?

Plant: Scroll Compressors | Cards: All | Show: Items List | Category: All | RYG: All

Filter By:  Select Operator:  Enter Value:

RYG	Item	Description	Total Cards	Total Qty
	003-0815-00	Lower Bearing Plate	4	6,000.00

**Reschedule Request Cards List** Views [How do I?](#)

Find Card ID  
[Reschedule](#) | [Attach Notes](#) | [Back To Items](#) | [Change Filter](#)

New Required Ship date:

▼	<input type="checkbox"/>	Card ID ▲	Supplier Item No. ▲	Release Date ▼	Reqd Ship ▲	Reqd Receive ▼	Qty On Card ▼	Card Qty ▼	New Reqd Ship Date
	<input checked="" type="checkbox"/>	KCD3FWBCNANJ	003-0815-00	03/24/2011	03/31/2011	04/04/2011	1,500.00	1,500	<input type="text" value="4/15/2011"/>
	<input type="checkbox"/>	KCD3FWACNADY	003-0815-00	03/24/2011	03/31/2011	04/04/2011	1,500.00	1,500	<input type="text" value="03/31/2011"/>
	<input type="checkbox"/>	KCD3FWMCNAQ8	003-0815-00	03/24/2011	03/31/2011	04/04/2011	1,500.00	1,500	<input type="text" value="03/31/2011"/>
	<input type="checkbox"/>	KCD2X6WCNAWZ	003-0815-00	03/24/2011	03/31/2011	04/04/2011	1,500.00	1,500	<input type="text" value="03/31/2011"/>

**Results:**

When the request is initiated, the card/order is moved from In Process to wait for approval state. If the buyer approves, then the required ship date is changed and the card is moved back to In Process state. If the buyer rejects then the card is just moved back to In Process state and the original required ship date is retained

**Reschedule Request Cards Results** [How do I?](#)

[Back To Items](#)

Following cards were successful

Card ID	Supplier Item No.	Description
KCD3FWBCNANJ	003-0815-00	Please call the Buyer <b>Jim Davis</b> and request that he/she approve the Promise Ship Date changes.

**Exception:**

If the buyer does not approve or reject then the card/order will be hanging. Supplier will not be able recall the request of ship the goods.

## Production Sequence

**Purpose:**

This action is primarily for a supplying work center and not for external supplier. This action provides a list of orders/jobs waiting for production. The jobs are sequenced on a daily basis optimized by predefined sort condition. This screen allows the supervisor to reschedule, re-sequence and reset the production. This screen allows operator to start a job, put the job on hold, complete the job and close production.

If OEE flag is enabled, this screen allows operators to perform multiple operations in sequence before completing production.

[REFER TO LFM USER GUIDE FOR DETAILS](#)

**Results:**

Depending on the type of action, several results are possible. The most common are changing of schedule date, operation completion, order completion and scrap accounting

**Exception:**

Again several exception can take place depending on the task. For details refer to Lean Factory Management (LFM) user guide.

## Print Cards

**Purpose:**

In a typical order flow, Ultriva allows the supplier to print a shipping label as soon as the ship transaction is completed. However there may be other reasons why supplier may need to print the labels before are after the shipping. One primary reason is:

- Supplier is shipping from stock and wants to print the labels first and use it as a pick list

When clicked on this action the list will show only cards that are In Process or In Transit and those that have not been printed before

The screenshot shows the 'Print Items List' interface. At the top, there are several filter dropdowns: Plant (Scroll Compressors), Cards (All), Show (Items List), Category (All), and RYG (All). Below these are input fields for 'Filter By', 'Select Operator', and 'Enter Value', along with a 'Go' button. A search bar labeled 'Find Supplier Item No.' is also present. A 'Show Cards' button is located on the right side of the interface. The main part of the screenshot is a table with the following data:

RYG	Item	Description	Total Cards	Total Qty
	003-0815-00	Lower Bearing Plate	6	9,000.00
	003-0816-00	Lower Bearing Plate	2	4,000.00

**Print Cards List** Views [How do I?](#)

Find Card ID  
[Print](#) | [Print PO](#) | [Back To Items](#) | [Change Filter](#)

<input type="checkbox"/>	Card ID ▲	Supplier Item No. ▲	Release Date ▼	Reqd Ship ▲	Card State ▼	Card Qty ▼	PO # ▼	PO Line # ▼
<input checked="" type="checkbox"/>	KCD3FWFCNAG9	003-0815-00	03/24/2011	03/31/2011	In Process	1,500	009047	0
<input checked="" type="checkbox"/>	KCD3FWNCNABA	003-0815-00	03/24/2011	03/31/2011	In Transit	1,500	009047	0
<input checked="" type="checkbox"/>	KCD3FWACNADY	003-0815-00	03/24/2011	03/31/2011	In Process	1,500	009047	0
<input checked="" type="checkbox"/>	KCD3FWMCNAQ8	003-0815-00	03/24/2011	03/31/2011	In Process	1,500	009047	0
<input checked="" type="checkbox"/>	KCD2X6WCNAWZ	003-0815-00	03/24/2011	03/31/2011	At Consolidator	1,500	009047	0
<input checked="" type="checkbox"/>	KCD3FWBCNANJ	003-0815-00	03/24/2011	04/15/2011	In Process	1,500	009047	0

Sorted by: Supplier Item No., Reqd Ship, Card ID 1 to 6 of 6

[Print](#) | [Print PO](#) | [Back To Items](#) | [Change Filter](#)

**Results:**

One or more cards can be printed. Multiple copies of the cards can also be printed

**Exception:**

Once it is printed it will not show up in this queue again

## Print Duplicate Cards

**Purpose:**

This action is only for printing duplicate cards for the following reasons:

- Label printed after shipping was lost and needs a duplicate label
- Printer problems can cause reprinting of the label

When clicked on this action the list will show only cards that are In Process or In Transit and those that have been printed before

**Results:**

Prints the label but puts duplicate on it.

**Exception:**

Only the labels that have been printed before will show up in the list

## Set Tracking No.

### Purpose:

Supplier can set the tracking number for the shipment when they perform the ship transaction in Ultriva. However in some cases the tracking number may not be available at that time. For such scenarios, suppliers can click this action and set the tracking number on the orders that are In Transit state

### Set Tracking Number Cards List

Views [How do I?](#)

[Set Tracking No](#) | [Attach Notes](#) | [Back To Items](#) | [Change Filter](#)

Tracking Number:  Packing Slip Number:

	Card ID	Supplier Item No.	CarrierTitle	Ship Date	Card Qty	ShipQty	Tracking No.	Packing Slip No.
	KCD3FWNCNABA	003-0815-00	Unknown	03/30/2011	1,500	1,500	<input type="text" value="456787"/>	<input type="text" value="T-799090"/>

### Results:

Sets the tracking number to the order and provides immediate visibility to the customer to facilitate shipment tracking

### Set Tracking Number Cards Results

[How do I?](#)

[Back To Items](#)

Following cards were successful

Card ID	Supplier Item No.	Description
KCD3FWNCNABA	003-0815-00	Tracking Number Successfully Updated.

### Exception:

None

## Set Work Order Number

### Purpose:

Supplier can add their internal work order number to the orders received from their customer. This is purely for traceability and has no other value.

### Set Work Order Number Cards List

Views [How do I?](#)

Find Card ID  [Set WorkOrder No](#) | [Attach Notes](#) | [Back To Items](#) | [Change Filter](#)

Work Order Number:

	<input type="checkbox"/>	Card ID ▲	Supplier Item No. ▲	Release Date ▼	Reqd Ship ▲	Reqd Receive ▼	Card Qty ▼	PO # ▼	PO Line # ▼	Release # ▼	Release Line # ▼	WorkOrder No.
	<input checked="" type="checkbox"/>	KCD2X7ECNABV	003-0815-00	03/22/2011	03/29/2011	03/31/2011	1,500	009047	0			<input type="text" value="898980"/>
	<input checked="" type="checkbox"/>	KCD2X74CNAQ4	003-0815-00	03/24/2011	03/31/2011	04/04/2011	1,500	009047	0			<input type="text" value="898980"/>
	<input checked="" type="checkbox"/>	KCD3FWFCNAG9	003-0815-00	03/24/2011	03/31/2011	04/04/2011	1,500	009047	0			<input type="text" value="898980"/>
	<input type="checkbox"/>	KCD2X76CNALB	003-0815-00	03/24/2011	03/31/2011	04/04/2011	1,500	009047	0			<input type="text"/>
	<input type="checkbox"/>	KCD2X7FCNAQP	003-0815-00	03/24/2011	03/31/2011	04/04/2011	1,500	009047	0			<input type="text"/>
	<input type="checkbox"/>	KCD3FWACNADY	003-0815-00	03/24/2011	03/31/2011	04/04/2011	1,500	009047	0			<input type="text"/>
	<input type="checkbox"/>	KCD3FWMCNAQ8	003-0815-00	03/24/2011	03/31/2011	04/04/2011	1,500	009047	0			<input type="text"/>

Sorted by: Supplier Item No., Reqd Ship, Card ID 1 to 10 of 14 [Prev](#) [Page 1](#) [Next](#)

[Set WorkOrder No](#) | [Attach Notes](#) | [Back To Items](#) | [Change Filter](#)

**Results:**

Adds the work order number to that card cycle and retains the information in history tables

### Set Work Order Number Cards Results

[How do I?](#)

[Back To Items](#)

Following cards were successful

	Card ID	Supplier Item No.	Description
	KCD2X7ECNABV	003-0815-00	WorkOrder Number Successfully Updated.
	KCD2X74CNAQ4	003-0815-00	WorkOrder Number Successfully Updated.
	KCD3FWFCNAG9	003-0815-00	WorkOrder Number Successfully Updated.

**Exception:**

None

## Re-sequence production orders

**Purpose:**

This is for internal supplying work center only and not for external supplier. This action allows the supervisor to reschedule and re-sequence production orders.

**REFER TO LFM USER GUIDE FOR DETAILS**

**Results:**

Schedule dates and production sequence for a specific day can be changed

**Exception:**

Refer to LFM user guide

## Master Label

**Purpose:**

The purpose of a Master Label is to print a consolidated label across multiple orders. Some common uses are:

- Customer orders in boxes while the supplier ships in a lot of 30 boxes.
- Supplier shrink wraps a pallet consisting of different part numbers for LTL carrier
- Supplier ships a truck load of parts to the customer

In all these instances a Master Label can be generated. When the customer receives the shipment they will have to scan only one label to receive:

- 30 boxes
- 1 pallet of different product mix
- Entire truck load of goods

**Master Label List For Scroll Compressors** How do I?

Plant: Scroll Compressors | Label Status: Created or Updated | Filter By: | Select Operator: | Enter Value: | Go

**Info** No Master Label(s) found in the system. Please click Add Master Label button to create one.

[Add](#)

**Create New Master Label** How do I?

Filter By: | Select Operator: | Enter Value: | Go

Find Card ID:  [Add](#) [Refresh](#) [Create New Master Label](#) [Back](#)

<input type="checkbox"/>	Card ID ▲	Supplier Item No. ▲	Release Date ▼	Req'd Ship ▲	Req'd Receive ▼	Plant Shipped ▼	Card Qty ▼	Ship Qty ▼	PO # ▼
<input checked="" type="checkbox"/>	KCD2X6PCNAT8	003-0815-00	03/24/2011	03/31/2011	04/04/2011	03/29/2011	1,500	1,500	009047
<input checked="" type="checkbox"/>	KCD2X6SCNA8A	003-0815-00	03/24/2011	03/31/2011	04/04/2011	03/29/2011	1,500	1,500	009047
<input checked="" type="checkbox"/>	KCD3FWFCNAG9	003-0815-00	03/24/2011	03/31/2011	04/04/2011	03/30/2011	1,500	1,500	009047
<input checked="" type="checkbox"/>	KCD3FWNCNABA	003-0815-00	03/24/2011	03/31/2011	04/04/2011	03/30/2011	1,500	1,500	009047

Sorted by: Supplier Item No., Req'd Ship, Card ID 1 to 4 of 4

[Create New Master Label](#) [Back](#)



### Ship Master Label MLB2223CNAT8 ? How do I?

Tracking No.  Carrier  Select Priority  Low  Medium  High Notes

Find Card ID  **Ship Master Label** << | Back

Card ID ▾	Supplier Item No. ▲	Card Qty ▲	Release Date ▾	Reqd Ship ▾	Plant Shipped ▾	Ship Qty ▾	PO # ▾
KCD2X6PCNAT8	003-0815-00	1,500	03/24/2011	03/31/2011	03/29/2011	1,500	009047
KCD2X6SCNA8A	003-0815-00	1,500	03/24/2011	03/31/2011	03/29/2011	1,500	009047
KCD3FWFCNAG9	003-0815-00	1,500	03/24/2011	03/31/2011	03/30/2011	1,500	009047
KCD3FWNCNABA	003-0815-00	1,500	03/24/2011	03/31/2011	03/30/2011	1,500	009047

Sorted by: Card Qty, Supplier Item No. 1 to 4 of 4

**Ship Master Label** << | Back

**Results:**

*Master label will be created and printed*

### Master Label List For Scroll Compressors ? How do I?

Master label MLB2223CNAT8 added Successfully ✕

Plant  Label Status  Filter By  Select Operator  Enter Value  **Go**

Label ID	Create Date	Created By	Last	Ship Master Label	Ship Failed Cards	al Cards	Cards failed to ship	Last Action Date
MLB2223CNAT8	03/30/2011	bmuser	bmuser	Created	4	0	03/30/2011	

Sorted by: Label ID 1 to 1 of 1

### Master Label MLB2223CNAT8 shipment results ? How do I?

Master Label shipped successfully ✕

**<< | Back**

Card ID	Supplier Item No.	Card Qty	Reqd Ship	ShipQty	PO #	PO Line #	Status Message
KCD2X6PCNAT8	003-0815-00	1,500	03/31/2011	1,500	009047	0	Successfully Shipped
KCD2X6SCNA8A	003-0815-00	1,500	03/31/2011	1,500	009047	0	Successfully Shipped
KCD3FWFCNAG9	003-0815-00	1,500	03/31/2011	1,500	009047	0	Successfully Shipped
KCD3FWNCNABA	003-0815-00	1,500	03/31/2011	1,500	009047	0	Successfully Shipped

**<< | Back**

**Exception:**

*If additional items are put in a truck or removed from the truck after the master label has been printed, then the master label has to be recreated and printed. Otherwise at the receiving dock, there will be a discrepancy between receipt transaction and actual physical inventory.*

## Add Notes

### Purpose:

Add Notes on the orders that are at In Process or In Transit state. Multiple notes can be added. This can be used as a mechanism to inform buyers the status of shipment.

RYG	Item	Description	Total Qty	Total Cards
	003-0815-00	Lower Bearing Plate	24,000.00	16
	003-0816-00	Lower Bearing Plate	8,000.00	4

Select card(s) and click attach notes. Select from list and click Submit.

Card ID	Item	Req'd Ship	Req'd Receive	Card Qty	PO #
KCD2X7ECNABV	003-0815-00	03/29/2011	03/31/2011	1,500	009047
KCD2X6S				1,500	009047
KCD2X74				1,500	009047
KCD3FWF				1,500	009047
KCD3FWN				1,500	009047
KCD2X76				1,500	009047
KCD2X7F				1,500	009047
KCD3FWA				1,500	009047
KCD3FWM				1,500	009047
KCD2X6R				1,500	009047

### Results:

The notes get attached to the card and can be viewed by other users who have access. Notification alerts can be created that can send emails to the respective users

## Add Notes Cards Results

[How do I?](#)

[Back To Items](#)

Following cards were successful

	Card ID	Item	Description
	KCD2X6SCN48A	003-0815-00	Notes added Successfully.

Move the shipment by 7 days