



Ultriva 7.6 and Higher Rules and Alerts Part 2 Reference Guide

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Rules and Alerts Tips



Quick Tip – When setting up a “Grid Alert” set it up in the Ultriva “Test” site first to assure that the rule is working properly prior to setting it up in the production, “Live” environment. Once you have the Rule/Alert set up in “Test” you can then “Copy” and “Paste” the message body in the “Live” site.

Ultriva has a “How Do I?” feature. From any screen, click on this feature and you will get instructions for the screen you are currently working from.



The information appears.

Rules ←

Rules are one of the key components of Ultriva application. Rules allow user to set up alerts that can be generated for an event happening or not happening. Ultriva allows users to generate this alert on the browser (you can see it when logging in to the application) or via email or both. Rules are created through a wizard that consists of three steps.

- First step – Selecting a rule from the pre-built template and defining filters if necessary
- Second step – Defining
 - o How the alerts to be delivered (Browser, email or both)
 - o Who should receive the alert
 - o Subject of the alert
 - o Message of the alert

For more detailed information on setting up “Rules/Alerts”, click on the link below to navigate to the “Ultriva Help Portal”, Admin Reference Guide.

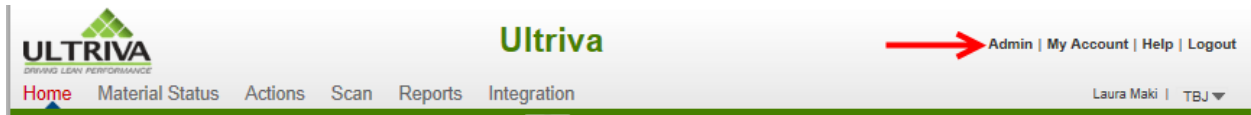
[Admin Reference Guide](#)

Verification/Editing of an Existing Rule

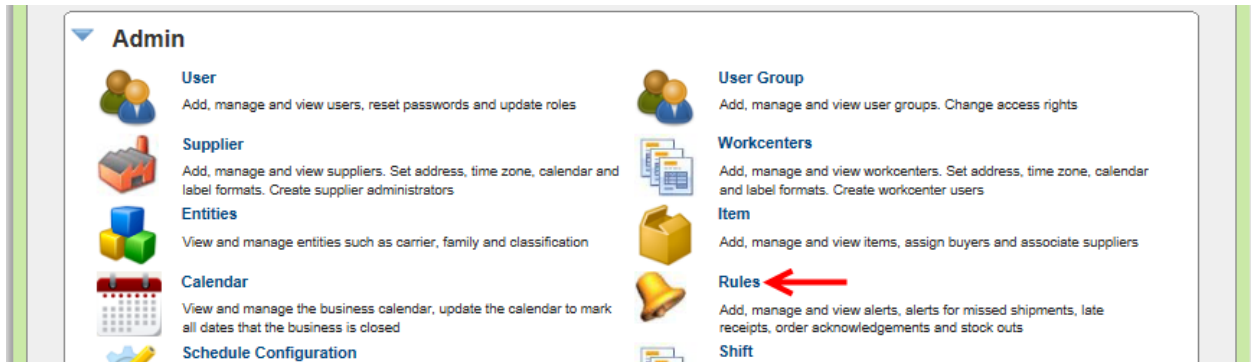


Quick Tip – When using the “Grouping” feature for an “Email Alert”, and a browser alert is also required, the “Alerts” must be created separately. First, verify that the rule does not already exist. If the “Rule” exists, and “Email and Browser” are both selected, follow the instructions below to create the 2 separate alerts.

To navigate to “Rules”, click on “Admin”



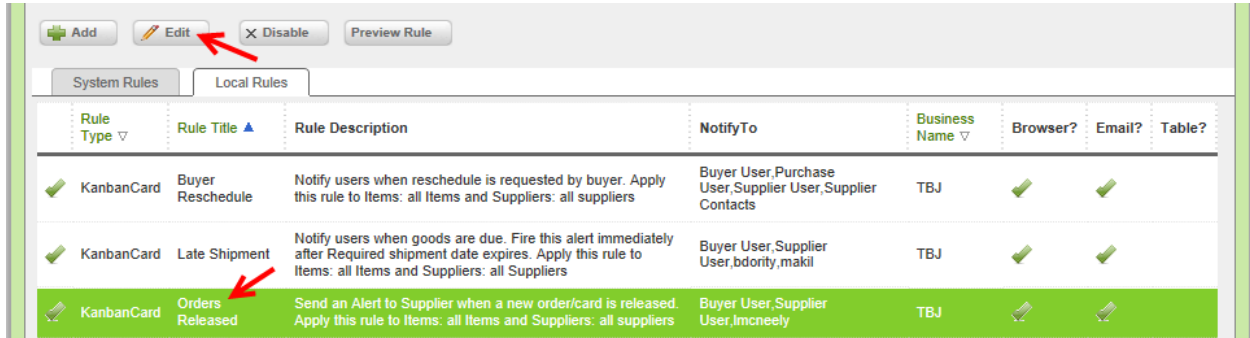
Click on “Rules”



Look to see if the “Rule” already exists. Check if “Browser and Email” are selected. If both are selected, follow the instructions below to create an individual rule for both.

Rule Type	Rule Title	Rule Description	NotifyTo	Business Name	Browser?	Email?	Table?
✓ KanbanCard	Buyer Reschedule	Notify users when reschedule is requested by buyer. Apply this rule to Items: all Items and Suppliers: all suppliers	Buyer User,Purchase User,Supplier User,Supplier Contacts	TBJ	✓	✓	
✓ KanbanCard	Late Shipment	Notify users when goods are due. Fire this alert immediately after Required shipment date expires. Apply this rule to Items: all Items and Suppliers: all Suppliers	Buyer User,Supplier User,bdority,makil	TBJ	✓	✓	
✗ KanbanCard	Orders Released	Send an Alert to Supplier when a new order/card is released. Apply this rule to Items: all Items and Suppliers: all suppliers	Buyer User,Supplier User,lmcneely	TBJ	✗	✗	
✓ KanbanCard	Recall Notice	Send an alert when a Card is recalled. Apply this rule to Items: all Items and Suppliers: all suppliers	Buyer User,Supplier User,makil	TBJ	✓		

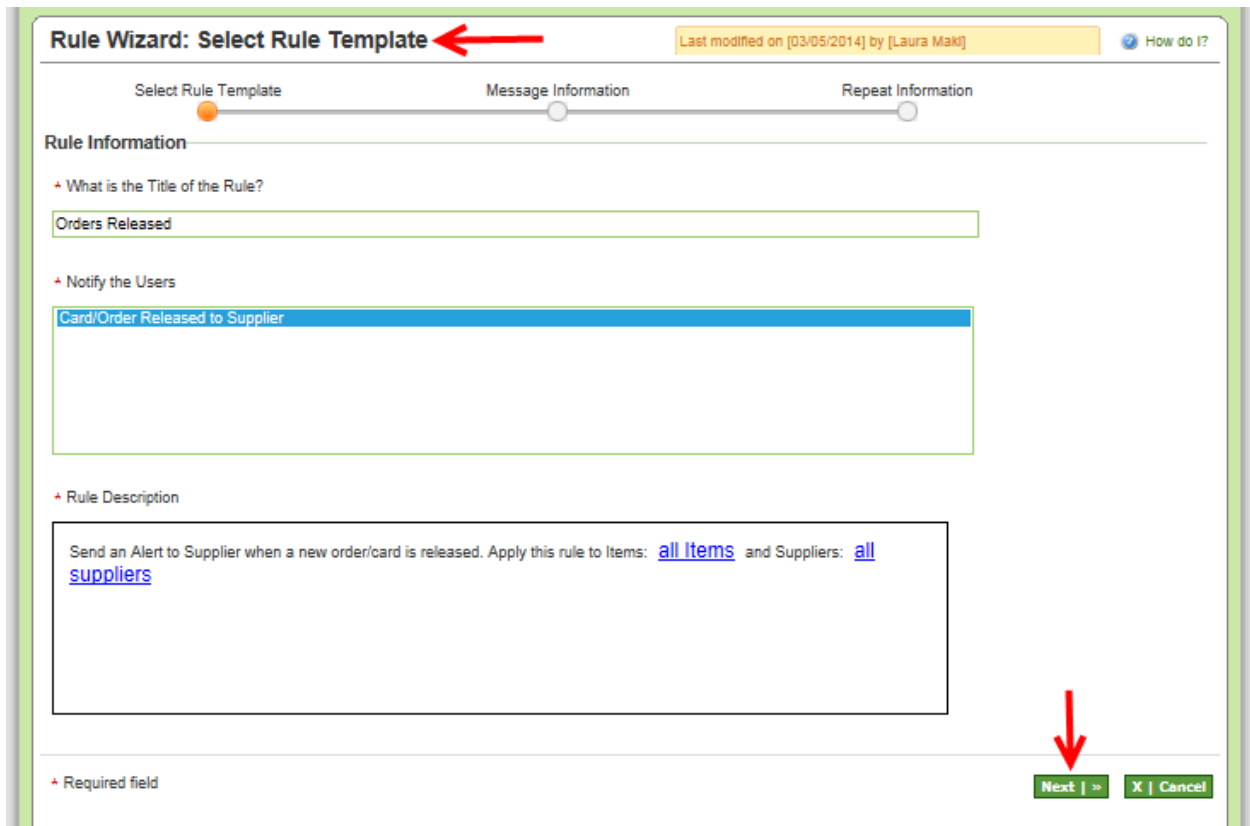
Click on the “Rule” and the line will highlight. Click on the “Edit” button.



The screenshot shows a web interface for managing rules. At the top, there are buttons for 'Add', 'Edit', 'Disable', and 'Preview Rule'. Below these are tabs for 'System Rules' and 'Local Rules'. A table lists several rules. The 'Orders Released' rule is highlighted in green, and a red arrow points to its 'Edit' button.

Rule Type	Rule Title	Rule Description	NotifyTo	Business Name	Browser?	Email?	Table?
KanbanCard	Buyer Reschedule	Notify users when reschedule is requested by buyer. Apply this rule to Items: all Items and Suppliers: all suppliers	Buyer User,Purchase User,Supplier User,Supplier Contacts	TBJ	✓	✓	
KanbanCard	Late Shipment	Notify users when goods are due. Fire this alert immediately after Required shipment date expires. Apply this rule to Items: all Items and Suppliers: all Suppliers	Buyer User,Supplier User,bdority,makil	TBJ	✓	✓	
KanbanCard	Orders Released	Send an Alert to Supplier when a new order/card is released. Apply this rule to Items: all Items and Suppliers: all suppliers	Buyer User,Supplier User,Imcneely	TBJ	✗	✗	

Click on the “Next” button



The screenshot shows the 'Rule Wizard: Select Rule Template' screen. It has a progress bar with three steps: 'Select Rule Template', 'Message Information', and 'Repeat Information'. The 'Select Rule Template' step is active. Below the progress bar, there are three sections: 'Rule Information', 'Rule Description', and 'Required field'. The 'Rule Information' section has a text input field for 'What is the Title of the Rule?' containing 'Orders Released'. The 'Rule Description' section has a text area containing 'Send an Alert to Supplier when a new order/card is released. Apply this rule to Items: all Items and Suppliers: all suppliers'. The 'Required field' section has a 'Next' button and an 'X | Cancel' button. A red arrow points to the 'Next' button.

In the “**Message Information**” fields, “**Send Message Via**”, click on the “**Email**” checkmark to remove it.

Rule Wizard: Message Information Last modified on [03/05/2014] by [Laura Maki] [How do I?](#)

Select Rule Template Message Information Repeat Information

Message Information

* Send message via: Table Browser Email Grouping:

Click on the “**Next**” button.

A Card/Order [KC:BPFL_GID]
is released for **ItemNo: [ITM:ITEMNO]**.
Required ShipDate: **[KC:ReqShipDate]**.
Card Quantity: **[KC:CardQty]**.

Append Notes

* Required field

Click on the “**Finish**” button.

Rule Wizard: Repeat Information Last modified on [03/05/2014] by [Laura Maki] [How do I?](#)

Select Rule Template Message Information Repeat Information

Repeat Information

Repeat: Times (0 = no repeat)

Every: Days

* Required field

The “**Rule Orders Released modified Successfully**”. The checkmark has been removed for the “Email” selection. The “Browser Alerts” are still set up and will still be sent out for the rule “Orders Released”. The following instructions will guide you through setting up an Email Grid alert using the “Grouping” feature.

Rule Type	Rule Title	Rule Description	NotifyTo	Business Name	Browser?	Email?	Table?
KanbanCard	Buyer Reschedule	Notify users when reschedule is requested by buyer. Apply this rule to Items: all Items and Suppliers: all suppliers	Buyer User,Purchase User,Supplier User,Supplier Contacts	TBJ	✓	✓	
KanbanCard	Late Shipment	Notify users when goods are due. Fire this alert immediately after Required shipment date expires. Apply this rule to Items: all Items and Suppliers: all Suppliers	Buyer User,Supplier User,bdority,makil	TBJ	✓	✓	
KanbanCard	Orders Released	Send an Alert to Supplier when a new order/card is released. Apply this rule to Items: all Items and Suppliers: all suppliers	Buyer User,Supplier User,Imcneely	TBJ	✓	✗	
KanbanCard	Recall Notice	Send an alert when a Card is recalled. Apply this rule to Items: all Items and Suppliers: all suppliers	Buyer User,Supplier User,makil	TBJ	✓		

If you came from the “Late Shipments” section, click on the link below to return.

[Return to Setting up a Grid Alert for Late Shipments](#)

Setting up a Grid Alert - Orders Released

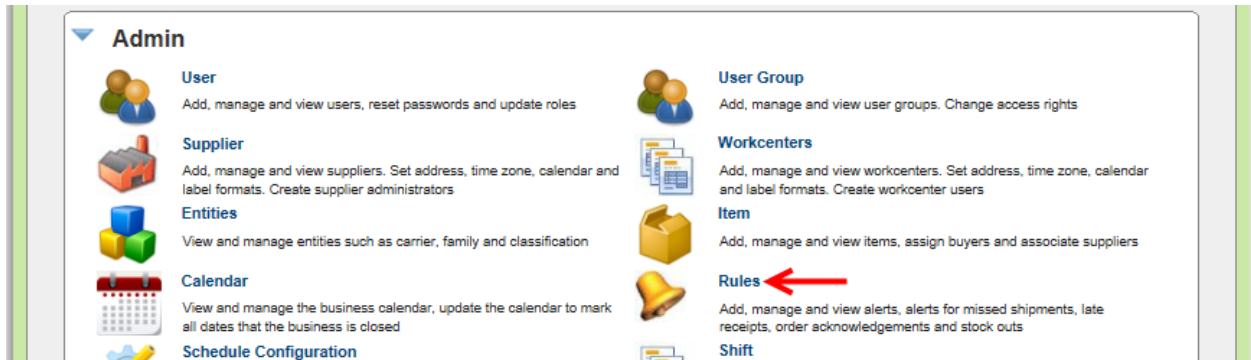


Quick Tip – This example: we will create a “Grid” alert for all “Cards/Orders Released to a Supplier”. The “Email Alert” will be set up to be sent, 1 time every 24 hours.

To navigate to “Rules”, click on “Admin”



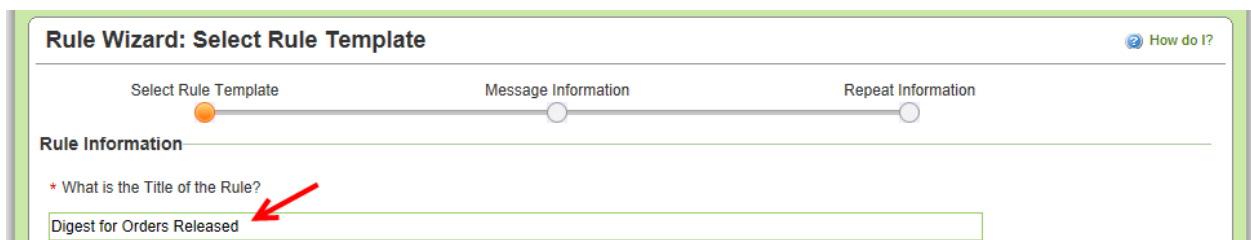
Click on “Rules”



Click on the “Add” button.



In the “What is the Title of the Rule” field, enter a “Title” for the rule.



Click on “Card/Order Released to Supplier” to select it. Click on the “Select” button.

Rule Wizard: Select Rule Template How do I?

Select Rule Template Message Information Repeat Information

Rule Information

* What is the Title of the Rule?
Digest for Orders Released

* Notify the Users

- Card/Order Released to Supplier
- When Some Action takes place
- When Notes with specific priority added
- When AppStatus changes
- When Goods are due
- When Goods are short shipped
- Potential Stock-out
- When cards are not accepted

Select



Quick Tip –Further filtering can be done for [all items](#) and [all suppliers](#) by clicking on them and making the selections.

The “**Rule Description**” appears. Click on the “Next” button. For this example, we will leave it at all items and all suppliers.

* Rule Description

Send an Alert to Supplier when a new order/card is released. Apply this rule to Items: [all Items](#) and Suppliers: [all suppliers](#)

* Required field

Next | X | Cancel

Click on the **checkmark** next to “**Browser**” to **remove** it.

Rule Wizard: Message Information How do I?

Select Rule Template Message Information Repeat Information

Message Information

* Send message via:

Table Browser Email

Preview Rule



Quick Tip –When “Grouping” is selected, the “Alert” (email) is not sent immediately. It is emailed within the timeframe selected. Grouping may not be useful in all situations, especially if the information is time critical. Based on how often the email will be sent may affect the outcome.

Click in the **box** next to “Email” and a **checkmark** will appear. Click on the **dropdown arrow** in the “Grouping” field and **drop down box** of selections appears. Click on a selection.

Rule Wizard: Message Information How do I?

Select Rule Template Message Information Repeat Information

Message Information

* Send message via: Preview Rule

Table Browser Email Grouping: None

* Message Recipient:

Buyer User Supplier User Quality User Supplier Contact

Every 1 Hour
Every 2 Hour(s)
Every 4 Hour(s)
Every 8 Hour(s)
Every 12 Hour(s)
Every 24 Hour(s)

Select the “Message Recipients” whom are to receive the “Alert”. Click in each box next to their title. A checkmark will appear.

Rule Wizard: Message Information How do I?

Select Rule Template Message Information Repeat Information

Message Information

* Send message via: Preview Rule

Table Browser Email Grouping: Every 24 Hour(s)

* Message Recipient:

Buyer User Supplier User Quality User Purchase User Supplier Contact



Quick Tip –Add as many “Additional Contacts” as needed

“Additional Contacts” can be added. Click in the “Message Recipient” field and a dropdown list appears. Select the “Additional Contacts”.



Quick Tip – When adding a “Message Subject” and the rule is being set up in “Test” you may want to add “Test” to the subject.

Adding the “Plant Name” to the subject may be beneficial since many suppliers are using Ultriva and the information would state it was from this plant.

Enter the “Message Subject”



Important – When setting up the “Message Body” there is a specific “Syntax” that MUST be followed.

Symbols for setting up a “Grid” Alert

Open Brace {

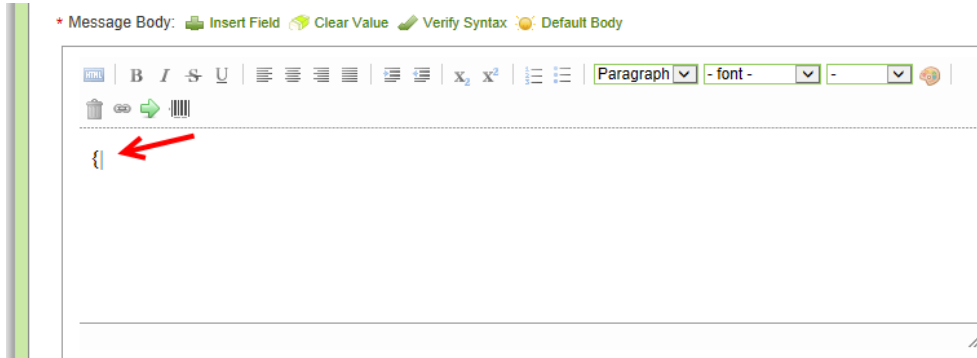
Close Brace }

Pipe |

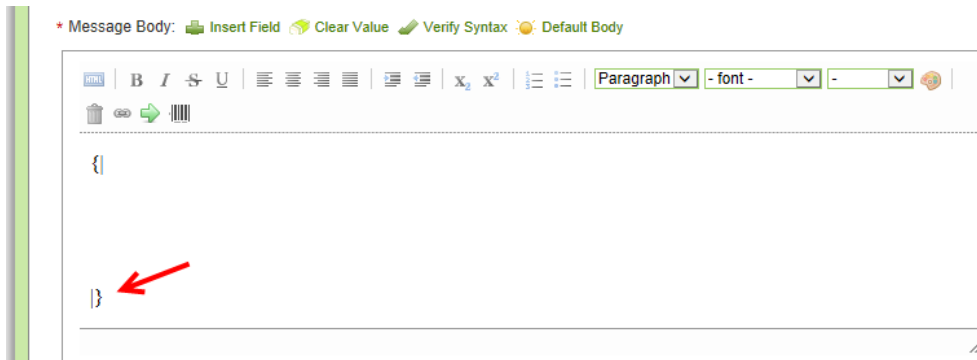
Exclamation Point !

Dash -

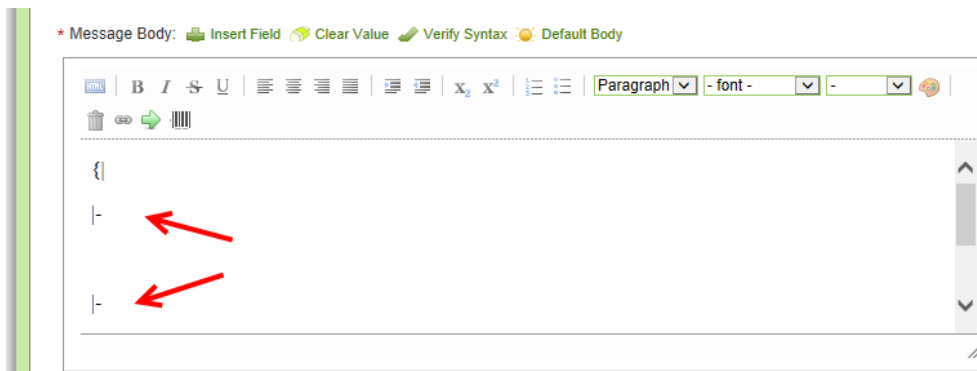
To start the “Grid Alert”, enter an “Open Brace” { and a “Pipe” | symbol {|



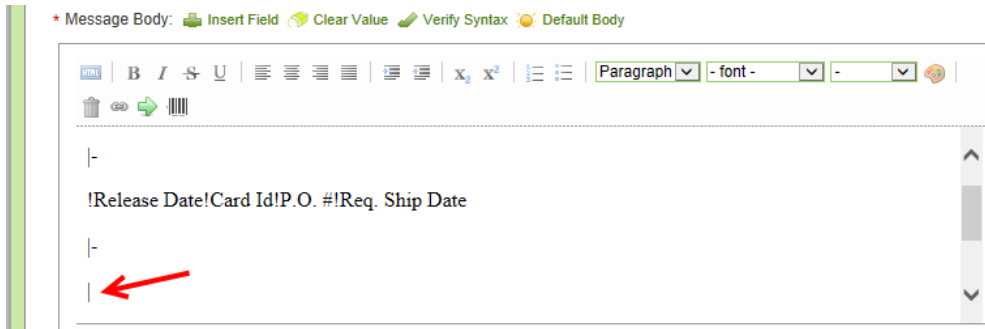
To end the “Grid Alert”, enter a “Pipe” | and a “Closed Brace” } symbol |} The “Alert” will now be set up between the “Open Brace, Pipe” {| and the “Pipe ,Closed Brace” |}



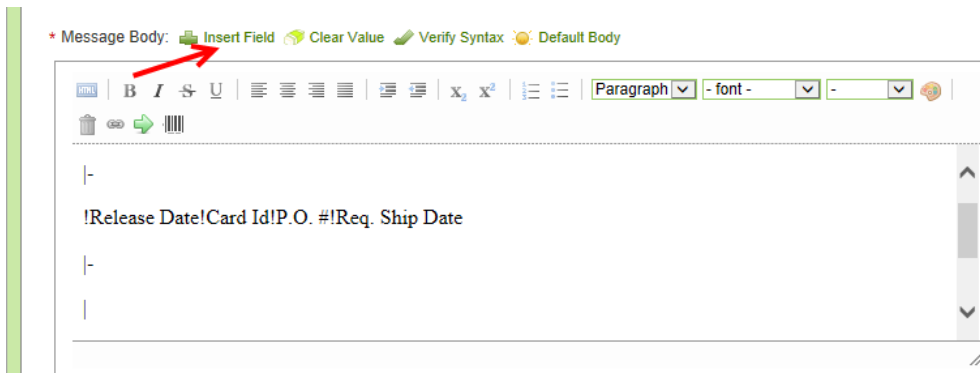
Under the “Open Brace Pipe” {| symbols, enter a “Pipe” | and a “Dash” - symbol to “Start the Header” |- Click on the keyboard “Enter” key twice. Enter a “Pipe” | and a “Dash” - symbol to “End the Header” |-. The “Header” will now be set up between the “Header Start” |- and the “Header End”|-



The “**Message Body**” information will **start** with a “**Pipe**” symbol |. **Type** in a “**Pipe**” symbol under the “**Pipe Dash**” |- symbols which **ended the header information**.



Click on “**Insert Field**”



Quick Tip – The fields that are inserted must match what the “Headers” are stating. For this Example - The first header is Release Date” so that will be the first field to be inserted.

Fields to Insert are as follows;

Release Date

Release ID for Card ID

PO #

Req Ship Date

This matches the order of the “Headers”.

Click in the circle next to “Released Date” to select it. Click on the “Insert” button. Selections can be made from all 4 of the tabs, Card, Cycle, Item and Plant fields.

Select a Field

Card Fields Cycle Fields Item Fields Plant Fields

Accepted Date Action Action Time

Approved Quantity Card Cycle Id Card Cycle No

Card Id CompletedQty DecimalFactor

DueDate ExpectRecvDate ExpireDt

IGParams Last completed cycle No LastReceivedTime

LocationCode Maintenance Date NextOperGID

OperComplQty OperSchStatus Original Required Receive Date

Original Required Ship Date PackingSlipNo PrevLocationCode

PrevOperComplQty Printed Date Qty Per Card

RecallAcceptDate RecallAcceptedBy RecallDate

RecalledBy Received Date Received Quantity

Released Date ReqAcceptDate Required Receive Date

Required Ship Date ScheduleDay SchSeqNo

Ship Tracking Number Shipped Date Shipped Quantity

State SupplierPromiseDate Release ID

Insert Cancel



Important – Once a field is inserted, do not make any changes within the brackets.

`[[KC:ReleaseDate]]`

The field appears. Type in a “Pipe” | symbol and insert the next field.

+ Message Body: Insert Field Clear Value Verify Syntax Default Body

!Released Cards!Card ID! PO #! Req Ship Date

|-

[[KC:ReleaseDate]]

|}

The “Rule” has been added successfully.

The screenshot displays the 'Rule List' interface. At the top, a notification banner reads 'Rule Digest for Orders Released added Successfully' with a red arrow pointing to it. Below the banner, the 'Rule Type' is set to 'KanbanCard'. A progress indicator shows '00.0%' and 'Enabled'. The interface includes filter controls and a table of rules. The table has columns for Rule Type, Rule Title, Rule Description, NotifyTo, Business Name, Browser?, Email?, and Table?. The rule 'Digest for Orders Released' is highlighted in green, with a red arrow pointing to its title.

Rule Type	Rule Title	Rule Description	NotifyTo	Business Name	Browser?	Email?	Table?
KanbanCard	Buyer Reschedule	Notify users when reschedule is requested by buyer. Apply this rule to Items: all Items and Suppliers: all suppliers	Buyer User,Purchase User,Supplier User,Supplier Contacts	TBJ	✓	✓	
KanbanCard	Digest for Late Shipments	Notify users when goods are due. Fire this alert immediately after Required shipment date expires. Apply this rule to Items: all Items and Suppliers: all Suppliers	Buyer User,Supplier User,Supplier Contacts	TBJ		✓	
KanbanCard	Digest for Orders Released	Send an Alert to Supplier when a new order/card is released. Apply this rule to Items: all Items and Suppliers: all suppliers	Buyer User,Supplier User,Supplier Contacts,agarcta	TBJ			

Copy a Message Body from Test to Prod

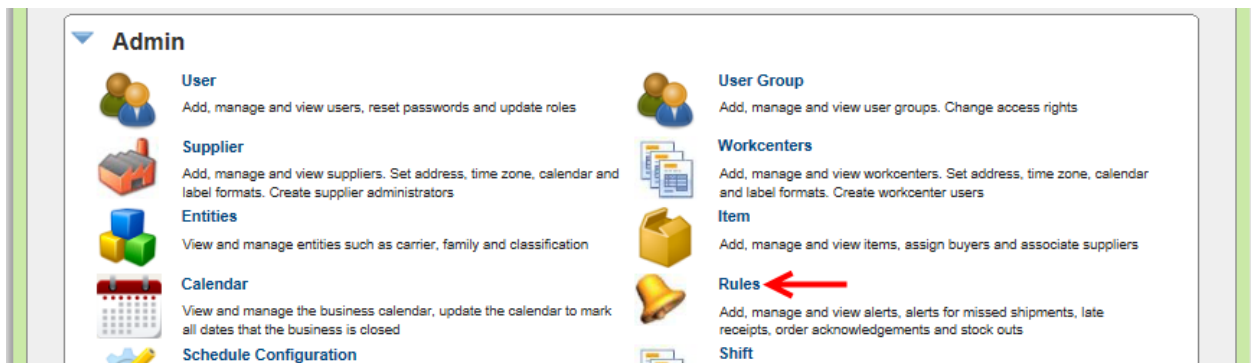


Quick Tip – Once a “Rule” is set up in Test and has been tested, copy the “Message Body” from Test to the Prod “Live” site to assure the accuracy of the rule set-up.

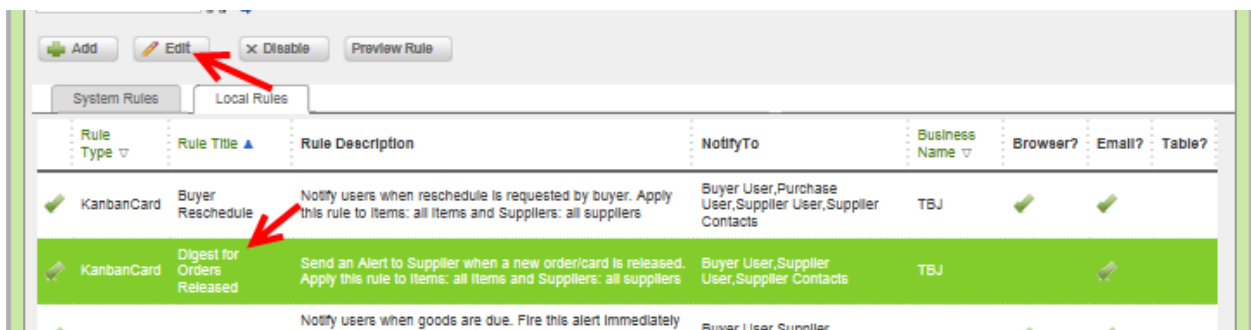
Navigate to the “Test” site. Click on “Admin”



Click on “Rules”



Click on the “Rule to Copy” and the line will highlight. Click on the “Edit” button.



Click on the “Next” button.

Rule Wizard: Select Rule Template Last modified on [03/11/2014] by [Laura Maki] How do I?

Select Rule Template Message Information Repeat Information

Rule Information

+ What is the Title of the Rule?
Digest for Orders Released

+ Notify the Users
Card/Order Released to Supplier

+ Rule Description
Send an Alert to Supplier when a new order/card is released. Apply this rule to Items: [all items](#) and Suppliers: [all suppliers](#)

+ Required field

Next >> X | Cancel

Highlight the entire “Message Body”. Right click on the mouse button and a dropdown box appears. Select “Copy”

!Release Date!Card ID!PC#!IP...Ship Date

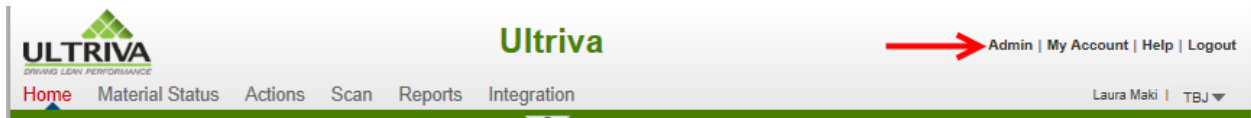
Undo
Cut
Copy
Paste
Delete
Select all
Inspect element

+ Required field

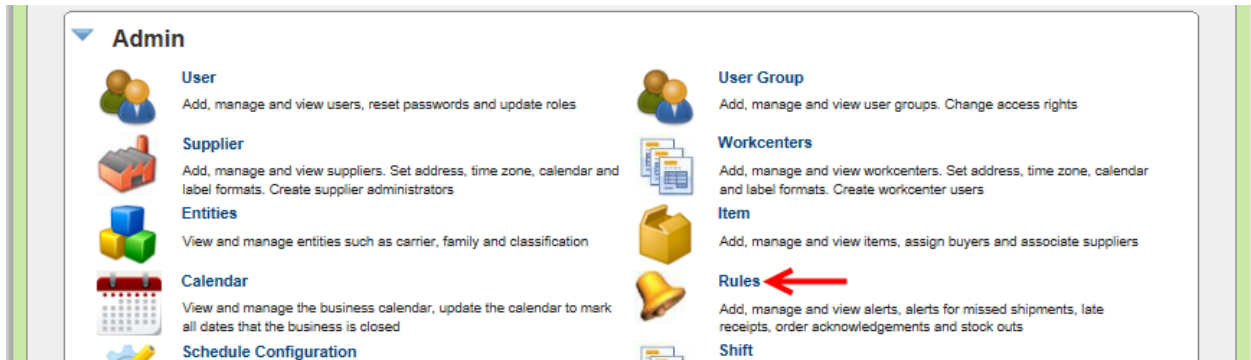
<< | Prev Next >> X | Cancel

Log out and log into the Prod “Live” site.

To navigate to “Rules”, click on “Admin”



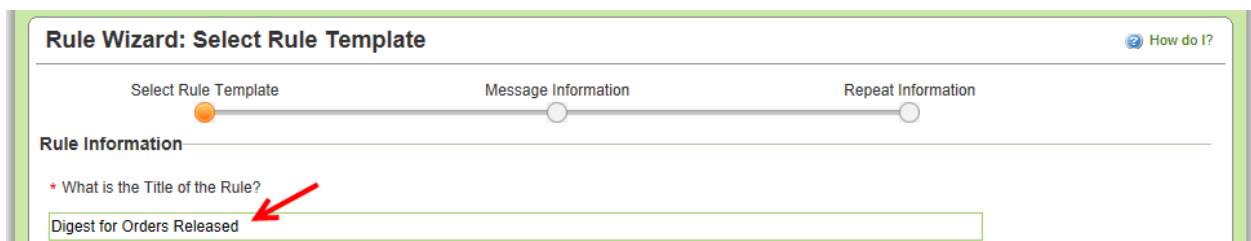
Click on “Rules”



Click on the “Add” button.



In the “What is the Title of the Rule” field, enter a “Title”.



Click on “Card/Order Released to Supplier” to select it. Click on the “Select” button.

Rule Wizard: Select Rule Template How do I?

Select Rule Template Message Information Repeat Information

Rule Information

* What is the Title of the Rule?
Digest for Orders Released

* Notify the Users

- Card/Order Released to Supplier
- When Some Action takes place
- When Notes with specific priority added
- When AppStatus changes
- When Goods are due
- When Goods are short shipped
- Potential Stock-out
- When cards are not accepted

Select



Quick Tip –Further filtering can be done for [all items](#) and [all suppliers](#) by clicking on them and making the selections.

The “**Rule Description**” appears. Click on the “Next” button. For this example, we will leave it at all items and all suppliers.

* Rule Description

Send an Alert to Supplier when a new order/card is released. Apply this rule to Items: [all Items](#) and Suppliers: [all suppliers](#)

* Required field

Next | X | Cancel

Click on the **checkmark** next to “**Browser**” to **remove** it.

Rule Wizard: Message Information How do I?

Select Rule Template Message Information Repeat Information

Message Information

* Send message via:

Table Browser Email

Preview Rule

Click in the **box** next to “**Email**” and a **checkmark** will **appear**. Click on the **dropdown arrow** in the “**Grouping**” field and **drop down box** appears. Click on a selection.





Select the “**Message Recipients**” whom are to **receive** the “**Alert**”. Click in each **box** next to their **title**. A **checkmark** will **appear**.




Quick Tip –Add as many “Additional Contacts” as needed





“**Additional Contacts**” can be **added**. Click in the “**Message Recipient**” field and a **dropdown list** appears. Select the “**Additional Contacts**”.


Enter the “Message Subject”

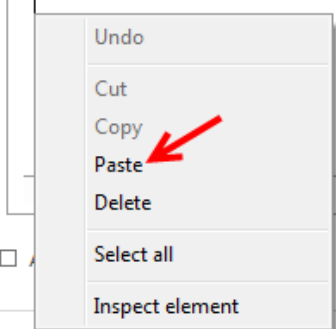
+ Message Subject:  Insert Field  Clear Value  Verify Syntax  Default Subject

Test - Digest for Released Orders - LJM Plant 





Right click the mouse button inside the “Message Body” and a **dropdown box** appears. Click on **“Paste”**


+ Message Body:  Insert Field  Clear Value  Verify Syntax  Default Body






The “Message Body” information has been “Copied” from the “Test” site. Click on the “Next” button.



+ Message Body:  Insert Field  Clear Value  Verify Syntax  Default Body



|
|
!Release Date!Card ID!PO #!Req Ship Date 
|

Append Notes

+ Required field

Click on the “Finish” button.

Rule Wizard: Repeat Information

Last modified on [03/11/2014] by [Laura Mak]

How do I?

Select Rule Template Message Information Repeat Information

Repeat Information

Repeat: 0 Times (0 = no repeat)

Every: 0 Days

Required field

Prev Finish Cancel

The “Rule” has been “Added Successfully”

Rule List

Filters Views How do I?

Rule Digest for Orders Released added Successfully

Rule Type: KanbanCard

Filter By Select Operator Enter Value Go

Find Rule Title

Add Edit Disable Preview Rule

Rule Type	Rule Title	Rule Description	NotifyTo	Business Name	Browser?	Email?	Table?
KanbanCard	Buyer Reschedule	Notify users when reschedule is requested by buyer. Apply this rule to Items: all Items and Suppliers: all suppliers	Buyer User,Purchase User,Supplier User,Supplier Contacts	TBJ	✓	✓	
KanbanCard	Digest for Late Shipments	Notify users when goods are due. Fire this alert immediately after Required shipment date expires. Apply this rule to Items: all Items and Suppliers: all Suppliers	Buyer User,Supplier User,Supplier Contacts	TBJ		✓	
KanbanCard	Digest for Orders Released	Send an Alert to Supplier when a new order/card is released. Apply this rule to Items: all Items and Suppliers: all suppliers	Buyer User,Supplier User,Supplier Contacts,agarcta	TBJ			

Setting up a Grid Alert - Late Shipments



Quick Tip – This example: we will create a “Grid” alert for all “Late Shipments”. An “Email Alert” will be set up to be sent 1 time every 24 hours.

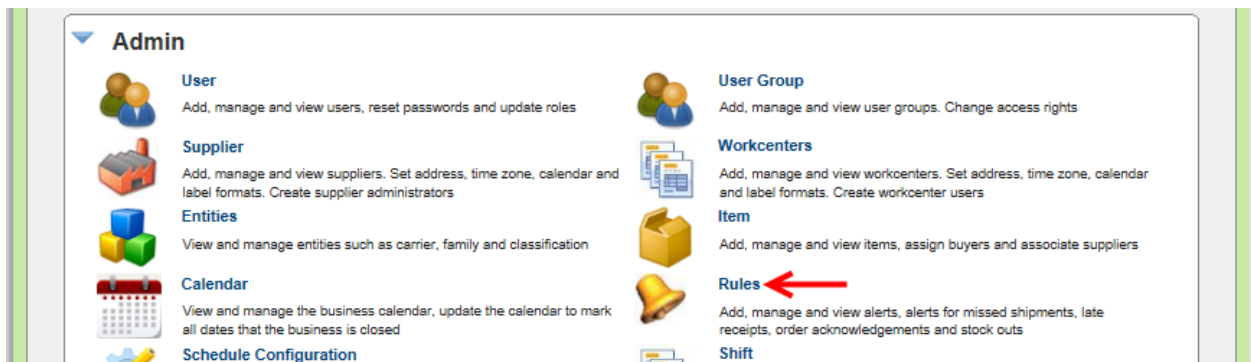
Click on the link below for detailed instructions on editing an existing rule where both “Browser” and “Email” are selected.

[Edit an Existing Rule](#)

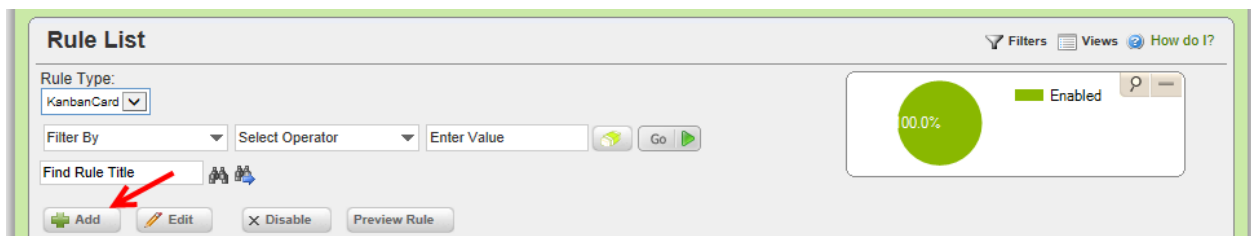
To navigate to “Rules”, click on “Admin”



Click on “Rules”



Click on the “Add” button.



In the “What is the Title of the Rule” field, enter a “Title”.

Rule Wizard: Select Rule Template How do I?

Select Rule Template Message Information Repeat Information

Rule Information

+ What is the Title of the Rule?

Digest for Late Shipments

Click on “When Goods are Due” and the line will highlight. Click on the “Select” button.

Rule Wizard: Select Rule Template How do I?

Select Rule Template Message Information Repeat Information

Rule Information

+ What is the Title of the Rule?

Digest for Late Shipments

+ Notify the Users

- Card/Order Released to Supplier
- When Some Action takes place
- When Notes with specific priority added
- When AppStatus changes
- When Goods are due
- When Goods are short shipped
- Potential Stock-out
- When cards are not accepted

Select



Quick Tip –Further filtering can be done for [all items](#) and [all suppliers](#) by clicking on them and making the selections.

The “Rule Description” appears. Click on the “Next” button. For this example, we will leave it at all items and all suppliers.

+ Rule Description

Send an Alert to Supplier when a new order/card is released. Apply this rule to Items: [all Items](#) and Suppliers: [all suppliers](#)

+ Required field

Next | X | Cancel

Click on the **checkmark** next to “**Browser**” to **remove** it.

Rule Wizard: Message Information How do I?

Select Rule Template Message Information Repeat Information

Message Information

* Send message via:

Table Browser Email Preview Rule

Click in the **box** next to “**Email**” and a **checkmark** will appear. Click on the **dropdown arrow** in the “**Grouping**” field and **drop down box** appears. Click on a selection.

Rule Wizard: Message Information How do I?

Select Rule Template Message Information Repeat Information

Message Information

* Send message via:

Table Browser Email Grouping: None
Every 1 Hour
Every 2 Hour(s)
Every 4 Hour(s)
Every 8 Hour(s)
Every 12 Hour(s)
Every 24 Hour(s)

* Message Recipient:

Buyer User Supplier User Quality User Supplier Contact

Preview Rule

Select the “**Message Recipients**” whom are to **receive** the “**Alert**”. Click in each **box** next to their **title**. A **checkmark** will appear.

Rule Wizard: Message Information How do I?

Select Rule Template Message Information Repeat Information

Message Information

* Send message via:

Table Browser Email Grouping: Every 24 Hour(s) Preview Rule

* Message Recipient:

Buyer User Supplier User Quality User Purchase User Supplier Contact



Quick Tip –Add as many “Additional Contacts” as needed

“Additional Contacts” can be added. Click in the “Message Recipient” field and a dropdown list appears. Select the “Additional Contacts”.

The screenshot shows the 'Message Recipient' section with several checkboxes: Buyer User (checked), Supplier User (checked), Quality User (unchecked), Purchase User (unchecked), and Supplier Contact (checked). Below these is a text input field with a dropdown menu open, listing contacts: abarga, acadmin, agarcia, alfredo, aloki, amcbride, avaracallo, avargas, and awinters. A red arrow points to the dropdown menu, and another red arrow points to the 'acadmin' contact.

Enter the “Message Subject”

The screenshot shows the 'Message Subject' field with a text input box containing the text 'Digest Rule for Late Shipments - LJM Plant'. A red arrow points to the text in the input box.

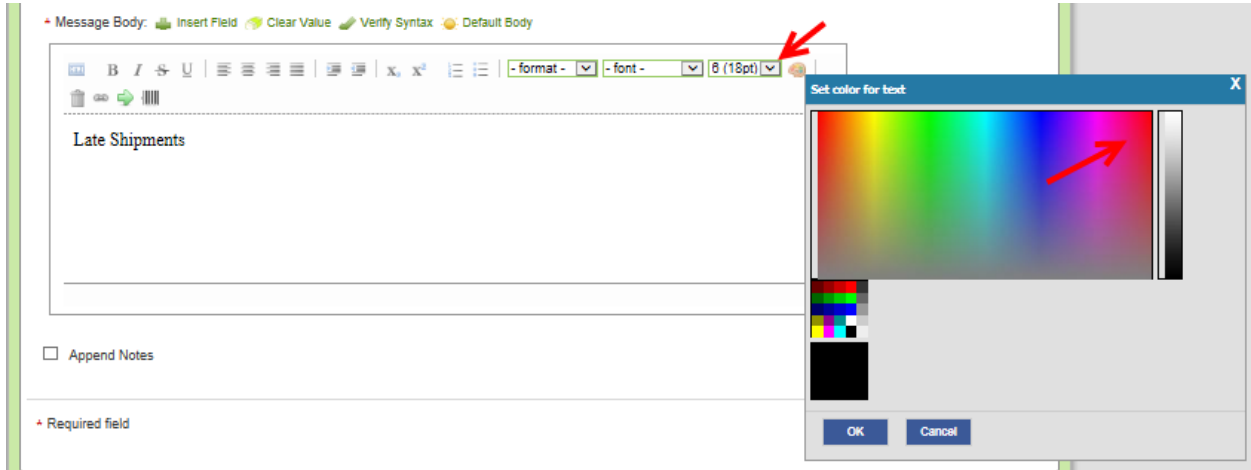


Quick Tip – Text can be added to the “Message Body. Example could be a title to the “Email” grid alert stating “Late Shipments”. More than 1 line can be entered.

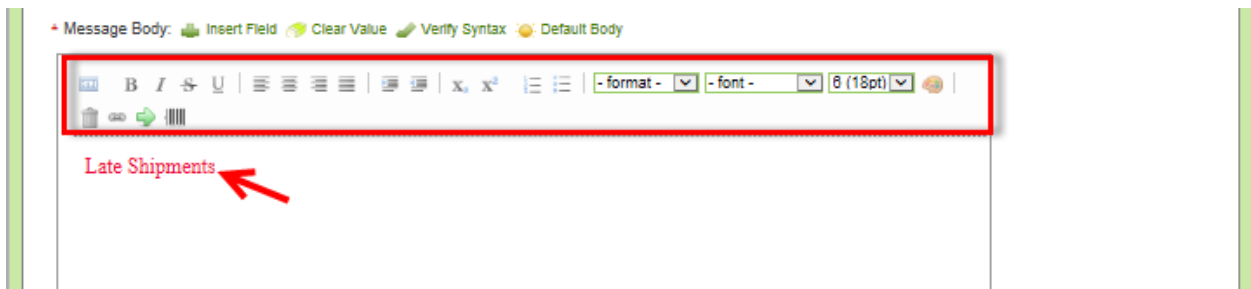
Click in the “Message Body” field and type in the additional text. (If applicable)

The screenshot shows the 'Message Body' field with a rich text editor toolbar. The text 'Late Shipments' is entered in the text area. A red arrow points to the text.

The “Text” can be “Edited” (if applicable).



The **font** has **changed**. There are many ways to “Edit” the information inside the “Message Body” All editing options are within in the Red outline.



 **Important** – When setting up the “Message Body” there is a specific “Syntax” that **MUST** be followed.

Symbols for setting up a “Grid” Alert

Open Brace {

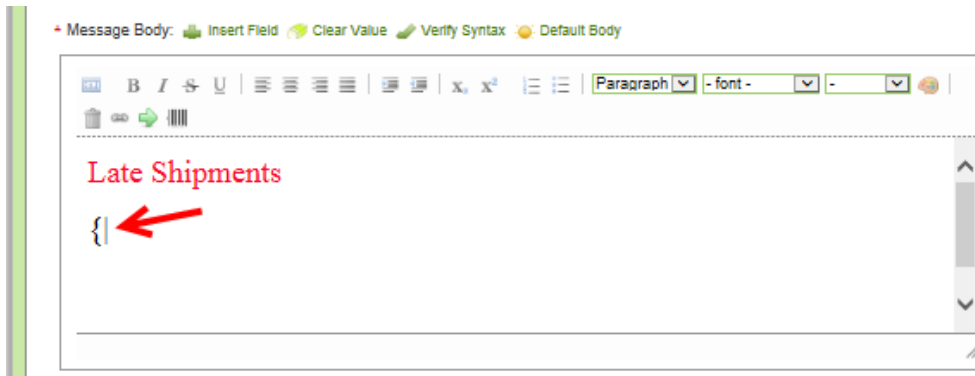
Close Brace }

Pipe |

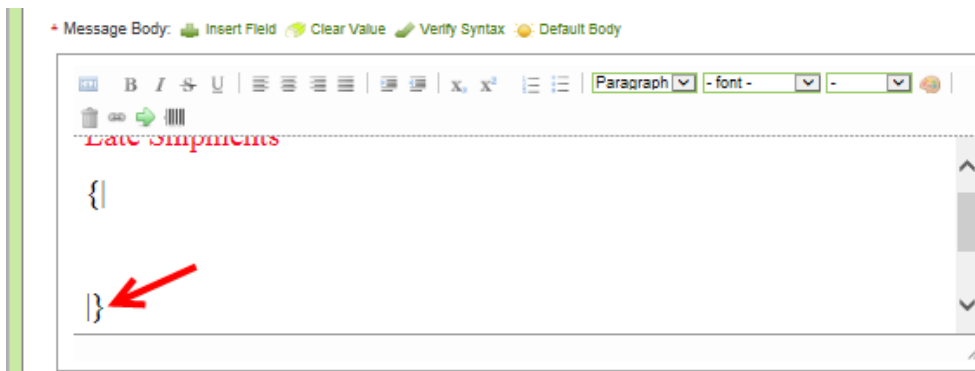
Exclamation Point !

Dash -

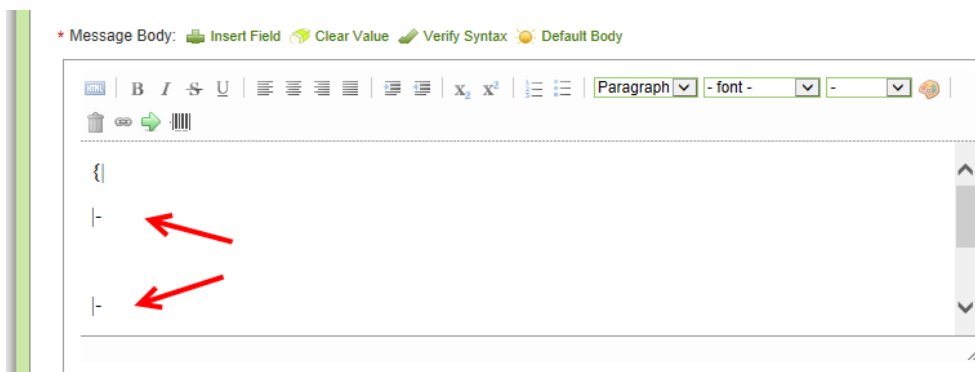
To start the “Grid Alert”, enter an “Open Brace” { and a “Pipe” | symbol { |



To end the “Grid Alert”, enter a “Pipe” | and a “Closed Brace” } symbol. |} The “Alert” will now be set up between the “Open Brace, Pipe” { | and the “Pipe, Closed Brace,” | }



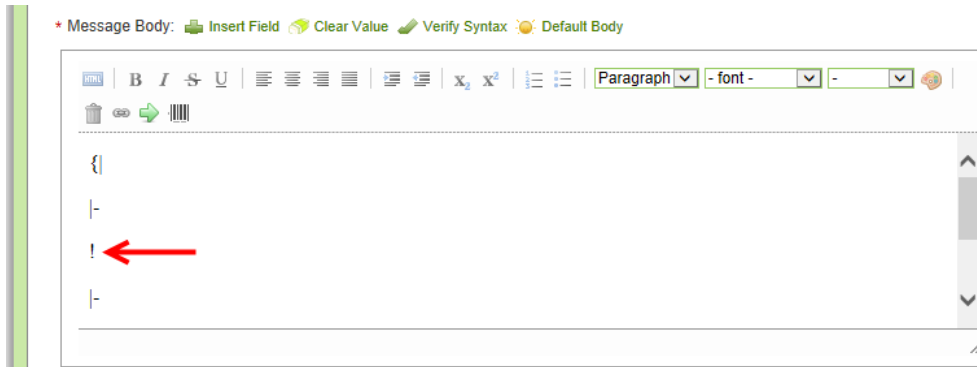
Under the “Open Brace Pipe” { |, enter a “Pipe” | and a “Dash” - symbol to “Start the Header” | - Click on the keyboard “Enter” key twice. Enter a “Pipe” | and a “Dash” - symbol to “End the Header”.





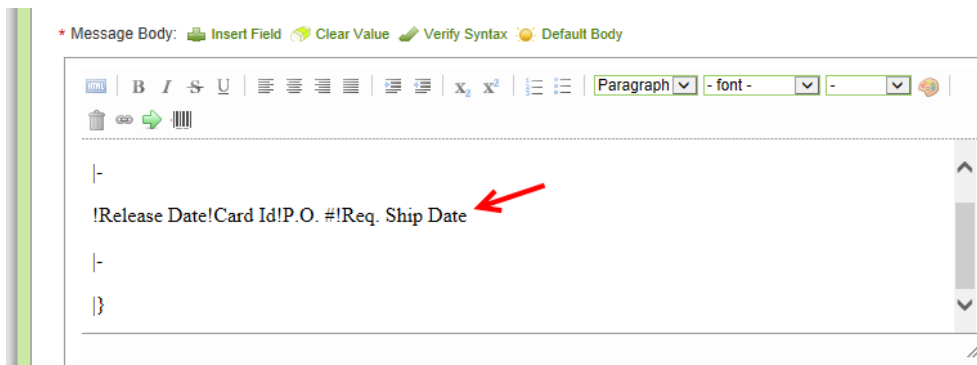
Quick Tip – When adding a “Header” an “Exclamation Point” will be the starting point and will also separate each header added.

To add a “Header”, in between the Start and End “Pipe/Dashes” |- that have been entered, enter an “Exclamation Point” !



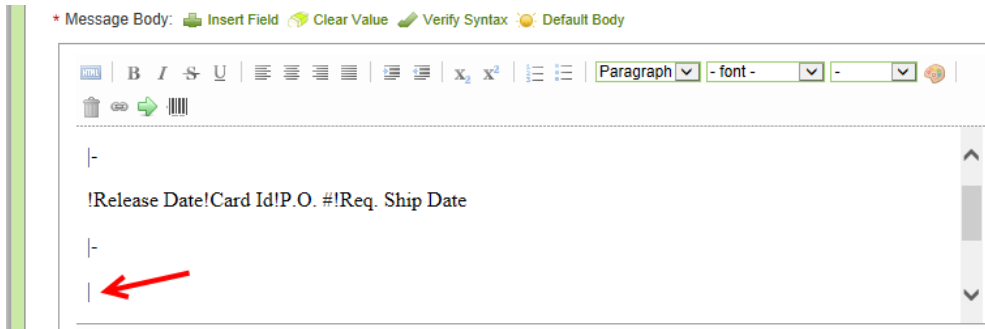
After the “Exclamation Point” ! symbol, type in the first header. Enter another exclamation point ! symbol and enter the next header. Repeat the steps for the remaining headers. For this example, the headers are as follows:

Released Date,
Card I.D.
P.O. #
Req. Ship Date.

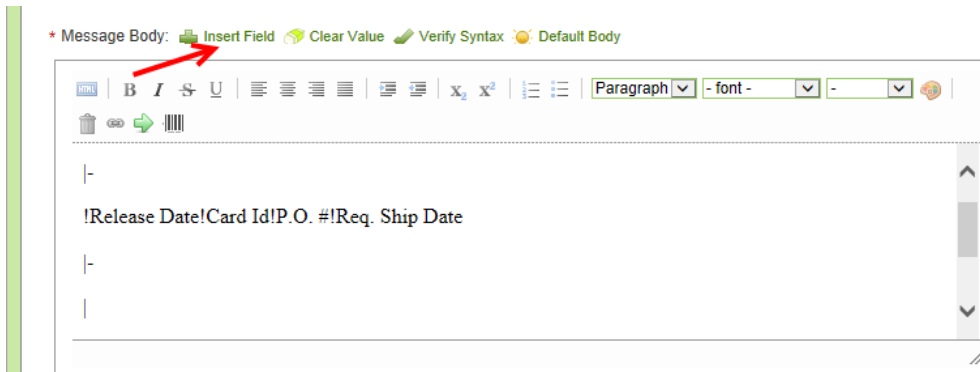


Important – Do not place an exclamation point at the end of the last header. If you have an exclamation point at the end it will add another column to the report.

The “**Message Body**” information will **start** with a “**Pipe**” | symbol. **Type** in the “**Pipe**” symbol, **under** the “**Pipe Dash**” |- symbols which **ended** the **header information**



Click on “**Insert Field**”



Quick Tip – The fields that are inserted must match what the “Headers” are stating. For this Example - The first header is Release Date” so that will be the first field to be inserted.

Fields to Insert are as follows;

Release Date

Release ID for Card ID

PO #

Requested Ship Date

This matches the order of the “Headers”.

Click in the circle next to “Released Date” to select. Click on the “Insert” button. Selections can be made from all 4 of the tabs, Card, Cycle, Item and Plant fields.

Select a Field

Card Fields Cycle Fields **Item Fields** Plant Fields

<input type="radio"/> Accepted Date	<input type="radio"/> Action	<input type="radio"/> Action Time
<input type="radio"/> Approved Quantity	<input type="radio"/> Card Cycle Id	<input type="radio"/> Card Cycle No
<input type="radio"/> Card Id	<input type="radio"/> CompletedQty	<input type="radio"/> DecimalFactor
<input type="radio"/> DueDate	<input type="radio"/> ExpectRecvDate	<input type="radio"/> ExpireDt
<input type="radio"/> IGParams	<input type="radio"/> Last completed cycle No	<input type="radio"/> LastReceivedTime
<input type="radio"/> LocationCode	<input type="radio"/> Maintenance Date	<input type="radio"/> NextOperGID
<input type="radio"/> OperComplQty	<input type="radio"/> OperSchStatus	<input type="radio"/> Original Required Receive Date
<input type="radio"/> Original Required Ship Date	<input type="radio"/> PackingSlipNo	<input type="radio"/> PrevLocationCode
<input type="radio"/> PrevOperComplQty	<input type="radio"/> Printed Date	<input type="radio"/> Qty Per Card
<input type="radio"/> RecallAcceptDate	<input type="radio"/> RecallAcceptedBy	<input type="radio"/> RecallDate
<input type="radio"/> RecalledBy	<input type="radio"/> Received Date	<input type="radio"/> Received Quantity
<input checked="" type="radio"/> Released Date	<input type="radio"/> ReqAcceptDate	<input type="radio"/> Required Receive Date
<input type="radio"/> Required Ship Date	<input type="radio"/> ScheduleDay	<input type="radio"/> SchSeqNo
<input type="radio"/> Ship Tracking Number	<input type="radio"/> Shipped Date	<input type="radio"/> Shipped Quantity
<input type="radio"/> State	<input type="radio"/> SupplierPromiseDate	<input type="radio"/> Release ID



Important – Once a field is inserted, do not make any changes within the brackets.

`[[KC:ReleaseDate]]`

The field appears. Type in a “Pipe” | symbol and insert the next field.

Message Body:

!Release Date!Card ID!PO #!Req Ship Date

|-

`[[KC:ReleaseDate]]`

|}



Important – Do not place a “Pipe” symbol after the last field inserted. If you have a “Pipe” symbol at the end, it will add another column to the report.

Insert the remaining fields and place a “Pipe” | symbol in-between each field inserted. Click on the “Preview Rule” button.

Rule Wizard: Message Information How do I?

Select Rule Template Message Information Repeat Information

Message Information

• Send message via: **Preview Rule**

Table Browser Email Grouping:

• Message Recipient:

Buyer User Supplier User Quality User Purchase User Supplier Contact

• Message Subject: Insert Field Clear Value Verify Syntax Default Subject

• Message Body: Insert Field Clear Value Verify Syntax Default Body

Append Notes

The “Preview Rule” appears. Click on the “Close” button.


Preview Rule: **Digest for Late Shipments**

From: Ultriva Lean Suite
To:
Subject: Digest for Late Shipments - LJM Plant





Late Shipments


Release Date	Card ID	PO #	Ship Date
1899-01-01 00:00:00	KCD4NLTCNA75-000-1	1899-01-01 00:00:00	

Close






Click on the “Next” button.


+ Message Body:  Insert Field  Clear Value  Verify Syntax  Default Body



| -
[[[KC:ReleaseDate]][releaseid('KC:BPFL_GID', 'cycleno')]]
[SUPV:SupplierPONum][KC:ReqShipDate]
| }
 Append Notes

+ Required field



Click on the “Finish” button.

Rule Wizard: Repeat Information

Select Rule Template Message Information Repeat Information

Repeat Information

Repeat: 0 Times (0 = no repeat)

Every: 0 Days

+ Required field

< | Prev Finish | > X | Cancel

The “Rule” has been “Added Successfully”

Rule List

Rule Digest for Late Shipments added Successfully

Rule Type: KanbanCard

Filter By Select Operator Enter Value Go

Find Rule Title

Add Edit Disable Preview Rule

System Rules Local Rules

Rule Type	Rule Title	Rule Description	NotifyTo	Business Name	Browser?	Email?	Table?
KanbanCard	Buyer Reschedule	Notify users when reschedule is requested by buyer. Apply this rule to Items: all Items and Suppliers: all suppliers	Buyer User,Purchase User,Supplier User,Supplier Contacts	TBJ	✓	✓	
KanbanCard	Digest for Late Shipments	Notify users when goods are due. Fire this alert immediately after Required shipment date expires. Apply this rule to Items: all Items and Suppliers: all Suppliers	Buyer User,Supplier User,Supplier Contacts	TBJ			