



Ultriva 7.6 and Higher
Change a Supplier
Coordinator
Reference Guide

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Change a Supplier Coordinator



Important – It is important that users be assigned to all items so that the main Supplier User or Additional Contacts are notified via email and/or browser alerts when actions occur for the items.

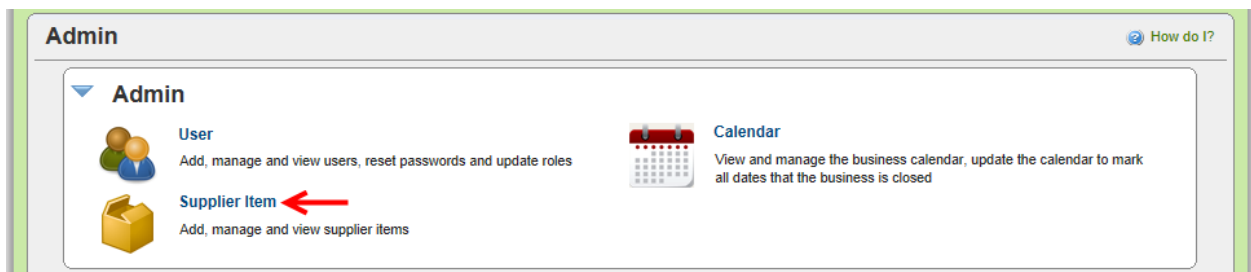


Quick Tip – Using the “Change Coordinator” function will save a lot of time when needing to initially set up items or change a “User” that has been assigned to multiple “Items”

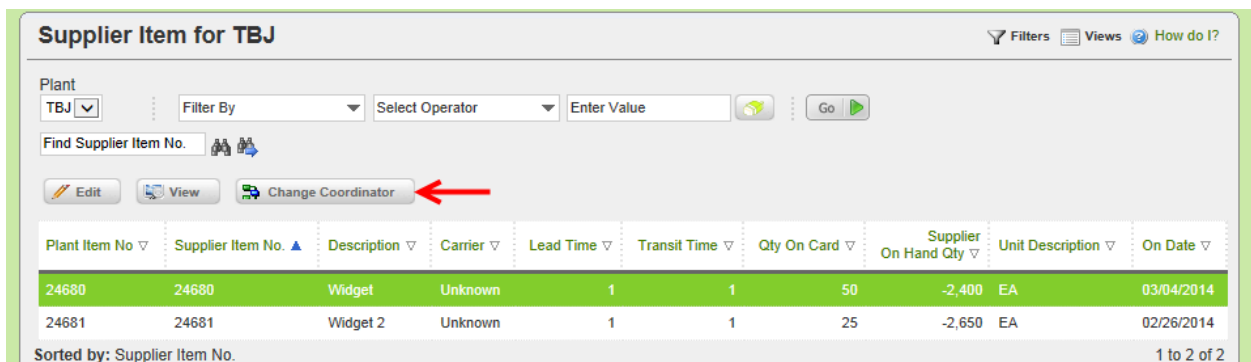
To navigate to “Change Coordinator”, click on “Admin”.



Click on “Supplier Item”



Click on the “Change Coordinator” button.



Click on the **drop down arrow** in the “**Please select the type of coordinator you want to change**” field. A **drop down box** will appear. Click on a selection. (*Supplier User or Additional Contacts*)

The screenshot shows the 'Change Coordinator Wizard' interface. The first step is 'Please select the type of coordinator you want to change:'. A dropdown menu is open, showing 'Supplier User' (highlighted) and 'Additional Contacts'. Red arrows point to the dropdown arrow and the selected 'Supplier User' option.

Click on the **drop down arrow** in the “**Please select an option by which you want to do this change**” field. A **drop down box** will appear. Click on a selection. (*By User or By Product Line*)

The screenshot shows the 'Change Coordinator Wizard' interface. The second step is 'Please select an option by which you want to do this change:'. A dropdown menu is open, showing 'By User' (highlighted) and 'By Product Line'. Red arrows point to the dropdown arrow and the selected 'By User' option.



Quick Tip – Here is where you will select the “Existing User” for this item. If there is no user currently assigned as a coordinator a selection still has to be made. Select “Not Assigned”.

Click in the “**Please select the user for which this change is to be applied**” field. Press on the **spacebar** or start to **type the userid** and a **drop down list** of the **users names** appear. Select the “**User**”.

The screenshot shows the 'Change Coordinator Wizard' interface. The third step is 'Please select the user for which this change is to be applied'. A text input field contains 'm'. A dropdown list is open, showing 'Not Assigned' (highlighted) and 'makil'. Red arrows point to the dropdown arrow and the selected 'Not Assigned' option.



Quick Tip – Here is where you will select the “New” user.

Click in the “Please select New User” field. Press on the spacebar or start to type the userid and a drop down list of the users names appear. Select the “User”.

The screenshot shows the 'Change Coordinator Wizard' interface. It has four main sections with instructions and input fields:

- Section 1: "Please select the type of coordinator you want to change:" with a dropdown menu set to "Supplier User".
- Section 2: "Please select an option by which you want to do this change:" with a dropdown menu set to "By User".
- Section 3: "Please select the user for which this change is to be applied" with a text input field containing "makil" and a close button (X).
- Section 4: "Please select New User:" with a text input field containing "je" and a dropdown list. The dropdown list is open, showing "jensena" as the selected option. Red arrows point to the input field and the dropdown list.



Quick Tip – Select “All Items or fewer items which can be selected on the next screen.

Select an option for “Do you want to apply this change to?” Click on the “Finish” button. In the example we selected “All Items”. If “Fewer Items” were selected, click on the “Next” button.

The screenshot shows the 'Change Coordinator Wizard' interface at a later stage. The previous sections are now filled out:

- Section 1: "Please select the type of coordinator you want to change:" with a dropdown menu set to "Supplier User".
- Section 2: "Please select an option by which you want to do this change:" with a dropdown menu set to "By User".
- Section 3: "Please select the user for which this change is to be applied" with a text input field containing "makil" and a close button (X).
- Section 4: "Please select New User:" with a text input field containing "jensena" and a close button (X).
- Section 5: "Do you want to apply this change to:?" with two radio buttons: "All the Items handled by user" (selected) and "Fewer Items handled by user". Red arrows point to both radio buttons.

At the bottom of the form, there are two buttons: "Finish | >>" and "<< | Cancel". A red arrow points to the "Finish" button.

The “Coordinator Updated Successfully” for “All Items”

Supplier Item for TBJ

Coordinator updated successfully

Plant: TBJ

Find Supplier Item No. [] [] []

Buttons: Edit, View, Change Coordinator

| Plant Item No | Supplier Item No. | Description | Carrier | Lead Time | Transit Time | Qty On Card | Supplier On Hand Qty | Unit Description | On Date |
|---------------|-------------------|-------------|---------|-----------|--------------|-------------|----------------------|------------------|------------|
| 24680 | 24680 | Widget | Unknown | 1 | 1 | 50 | -2,300 | EA | 02/26/2014 |
| 24681 | 24681 | Widget 2 | Unknown | 1 | 1 | 25 | -2,650 | EA | 02/26/2014 |

Sorted by: Supplier Item No. 1 to 2 of 2

If “Fewer Items” were selected, select the items and click on the “Finish” button.

Change Coordinator Wizard

Select the items for which the coordinator has to be modified

All Items

24680 24681

Buttons: < Previous, Finish >, < Cancel

The “Coordinator Updated Successfully”

Supplier Item for TBJ

Coordinator updated successfully

Plant: TBJ

Find Supplier Item No. [] [] []

Buttons: Edit, View, Change Coordinator

| Plant Item No | Supplier Item No. | Description | Carrier | Lead Time | Transit Time | Qty On Card | Supplier On Hand Qty | Unit Description | On Date |
|---------------|-------------------|-------------|---------|-----------|--------------|-------------|----------------------|------------------|------------|
| 24680 | 24680 | Widget | Unknown | 1 | 1 | 50 | -3,900 | EA | 04/08/2014 |
| 24681 | 24681 | Widget 2 | Unknown | 1 | 1 | 25 | -3,700 | EA | 04/07/2014 |

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