



Ultriva 7.6 and Higher Manually Releasing Cards Reference Guide

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Navigating to Releasing a Card(s)



Important – If Ultriva is integrated with the ERP system, check with your Ultriva Administrator to make sure that manually releasing a card will not create integration failures.



Quick Tip – Releasing an order is very easy. There are multiple choices to select from when “Releasing” the order. The list is below. Choose the one that best fits the need for the user.

Home (Default)
Actions/ Release
Buyer Queue
Buyer Status

Click on the link below for detailed instructions on releasing cards from the “Home” screen

[Released Cards Home Default Screen](#)

Click on the link below for detailed instructions on releasing cards from the “Actions” screen

[Released Cards Actions Ship Screen](#)

Click on the link below for detailed instructions on releasing cards from the “Buyer Queue” screen

[Released Cards Buyer Queue](#)

Click on the link below for detailed instructions on releasing cards from the “Buyer Status” screen

[Released Cards Buyer Status](#)

Release Cards - Home (Default) Screen



Important – If Ultriva is integrated with the ERP system, check with your Ultriva Administrator to make sure that manually releasing a card will not create integration failures.

From the “**Home**” (Default) screen, in the **My Routines** field, click on “**Release Cards**”

The screenshot shows the 'Buyer Home' dashboard with several widgets. The 'My Routines' widget is expanded to show a list of tasks. A red arrow points to the 'Release Orders' item under the 'Daily' category.

Category	Item
Daily	Release Orders
Daily	Receive Goods
Daily	Create Spike Order
Daily	Analyze Material Status
Daily	Approve Virtual Kanban
Daily	View Receipts Due
Monthly	Analyze Supplier Performance
Monthly	Analyze Cycle Time
Monthly	Analyze Inventory Savings
Monthly	Analyze Stock out
Monthly	Analyze Kanban Inventory

Click on the **part number** to advance to the “**Release Cards**” list, or click on a **line item** and the **line will highlight**. If you **highlighted** the **line**, click on the “**Show Cards**” button

The screenshot shows the 'Release Items List' screen. The 'Show Cards' button is highlighted with a red arrow. Below it, a table lists items, with the row for item 24681 highlighted in green. A red arrow points to the item number 24681 in the table.

RYG	Item	Description	Total Cards	Total Qty
	24680	Widget	13	650
	24681	Widget 2	21	525



Quick Tip – If the selections are not what was intended to be released you can change the “Filter” by clicking on the “Change Filter” button. The “Filter” allows the user to select specific criteria for the action they are performing.

Click on the link below for detailed instructions on how to change the “Filter”



Quick Tip – If an item has more than one supplier, “Auto Assign” will be an option under the “Supplier” column. If left on “Auto Assign, Ultriva will automatically calculate and release the card(s) to the appropriate supplier based on the supplier percentages entered in the supplier set up. If preferred, the supplier can be selected by clicking on the dropdown arrow in the supplier field and choosing the supplier.

Click in the selection box at the column heading to select all cards or select the cards individually. A checkmark will appear. Click on the “Release” button.

Release Cards List									
<input checked="" type="checkbox"/>	Card ID	Item	Description	Cycle No	Qty On Card	Card Qty	Location Code	Last Received	Supplier
<input checked="" type="checkbox"/>	KCD4N34CNA7Y	24681	Widget 2	5	50	25	STK	04/07/2014	-- Auto Assign --
<input checked="" type="checkbox"/>	KCD4N3YCNAV2	24681	Widget 2	4	50	25	STK	04/07/2014	-- Auto Assign --
<input checked="" type="checkbox"/>	KCD4N43CNA2R	24681	Widget 2	4	50	20	STK	06/16/2014	-- Auto Assign --

The “Cards Successfully Released”

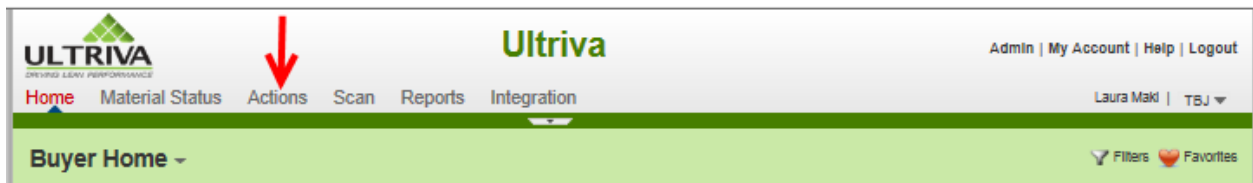
Release Cards Results			
Card ID	Item	Card Qty	Description
KCD4N39CNA55	24681	25	Released To A&G Machining.
KCD4N3ACNA2J	24681	25	Released To A&G Machining.
KCD4N3BCNAZY	24681	25	Released To A&G Machining.
KCD4N3CCNA6V	24681	25	Released To A&G Machining.
KCD4N2XCNAFP	24681	25	Released To A&G Machining.

Release Cards – Actions Screen

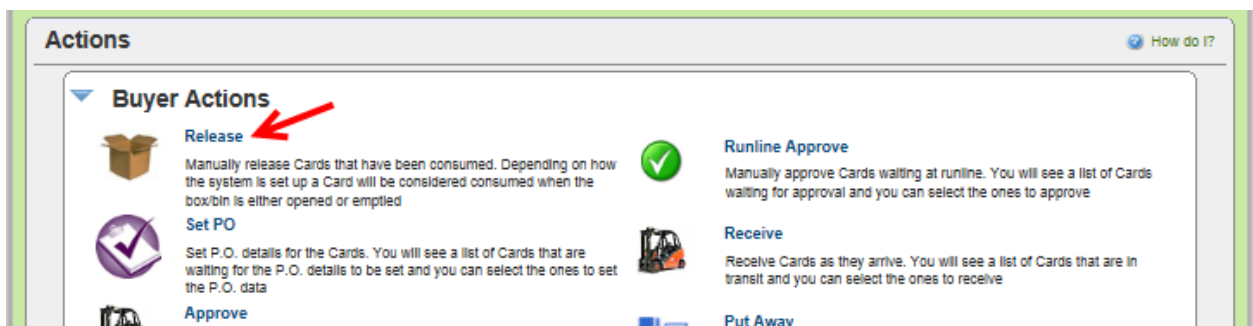


Important – If Ultriva is integrated with the ERP system, check with your Ultriva Administrator to make sure that manually releasing a card will not create integration failures.

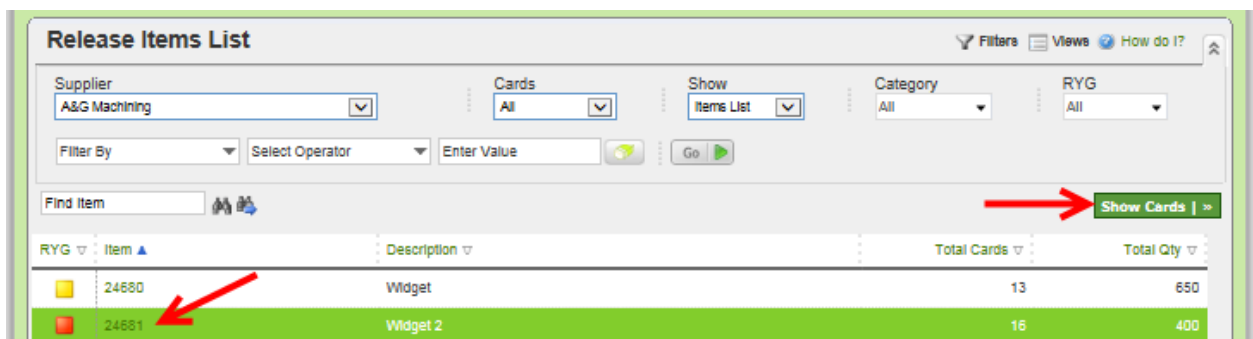
Click on “Actions”



Click on “Release”



Click on the “Item” number and the line will highlight. Click on the “Show Cards” button.





Quick Tip – If the selections are not what was intended to be released you can change the “Filter” by clicking on the “Change Filter” button. The “Filter” allows the user to select specific criteria for the action they are performing.

Click on the link below for detailed instructions on how to change the “Filter”



Quick Tip – If an item has more than one supplier, “Auto Assign” will be an option under the “Supplier” column. If left on “Auto Assign, Ultriva will automatically calculate and release the card(s) to the appropriate supplier based on the supplier percentages entered in the supplier set up. If preferred, the supplier can be selected by clicking on the dropdown arrow in the supplier field and choosing the supplier.

Click in the selection box at the column heading to select all cards or select the cards individually. A checkmark will appear. Click on the “Release” button.

Release Cards List									
<input checked="" type="checkbox"/>	Card ID	Item	Description	Cycle No	Qty On Card	Card Qty	Location Code	Last Received	Supplier
<input checked="" type="checkbox"/>	KCD4N34CNA7Y	24681	Widget 2	5	50	25	STK	04/07/2014	-- Auto Assign --
<input checked="" type="checkbox"/>	KCD4N3YCNV2	24681	Widget 2	4	50	25	STK	04/07/2014	-- Auto Assign --
<input checked="" type="checkbox"/>	KCD4N43CNA2R	24681	Widget 2	4	50	20	STK	06/16/2014	-- Auto Assign --

The “Cards Successfully Released”

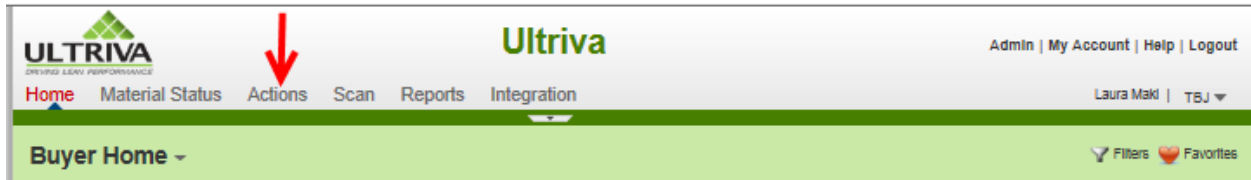
Release Cards Results			
Card ID	Item	Card Qty	Description
KCD4N2YCNAQJ	24681	25	Released To A&G Machining.
KCD4N3VCNATQ	24681	25	Released To A&G Machining.
KCD4N3WCNA4M	24681	25	Released To A&G Machining.
KCD4N3XCNA27	24681	25	Released To A&G Machining.
KCD4N2ZCNABY	24681	25	Released To A&G Machining.

Release Cards - Buyer Queue

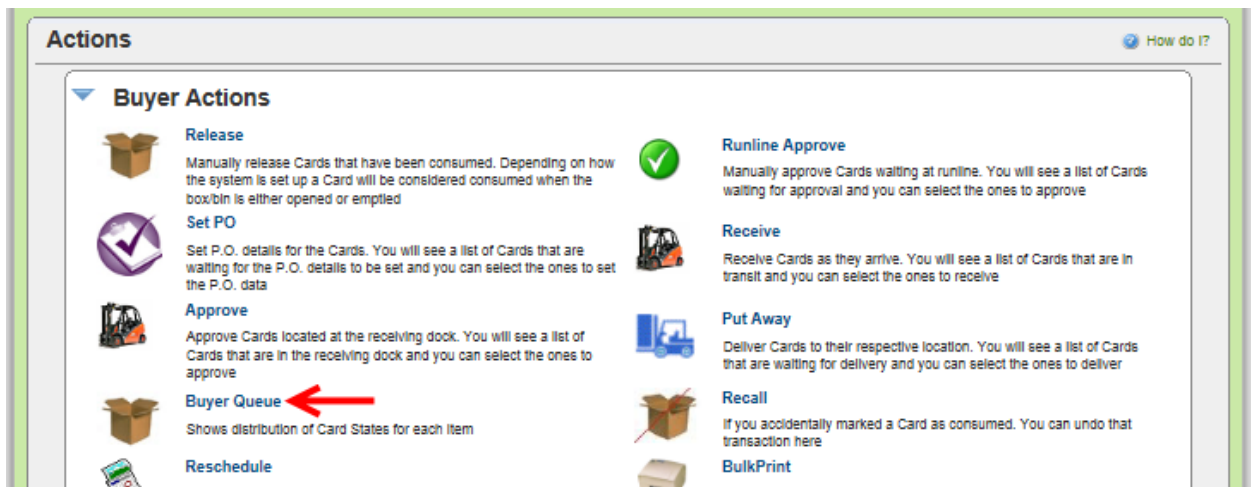


Important – If Ultriva is integrated with the ERP system, check with your Ultriva Administrator to make sure that manually releasing a card will not create integration failures.

Click on “Actions”



Click on “Buyer Queue”



In the “On Hand” column, click on the number of cards “On Hand”

Supplier		Show	Category	RYG	Product Line:	Commodity Code:					
A&G Machining		All Items x	All	All	All	All					
Filter By	Select Operator	Enter Value	Go								
RYG	Item	On Hand	Released	In Process	At Ship Hub	In Transit	Received At Dock	Put Away	Others	Description	Supplier Item
		Cards Qty	Cards Qty	Cards Qty	Cards Qty	Cards Qty	Cards Qty	Cards Qty	Cards Qty		
Green	24680	9 900	0 0	0 0	0 0	0 0	0 0	4 400	0 0.0	Widget	24680
Red	24681	2 50	0 0	0 0	0 0	0 0	0 0	43 1,300	0 0.0	Widget 2	24681



Quick Tip – If an item has more than one supplier, “Auto Assign” will be an option under the “Supplier” column. If left on “Auto Assign, Ultriva will automatically calculate and release the card(s) to the appropriate supplier based on the supplier percentages entered in the supplier set up. If preferred, the supplier can be selected by clicking on the dropdown arrow in the supplier field and choosing the supplier.

Click in the selection box at the column heading to select all cards or select the cards individually. A checkmark will appear. Click on the “Release” button.

<input checked="" type="checkbox"/>	Card ID ▾	Item ▲	Description ▾	Cycle No ▾	Qty On Card ▾	Card Qty ▾	Location Code ▾	Last Received ▲	Supplier
<input checked="" type="checkbox"/>	KCD4N34CNA7Y	24681	Widget 2	5	50	25	STK	04/07/2014	-- Auto Assign -- ▾
<input checked="" type="checkbox"/>	KCD4N3YCNV2	24681	Widget 2	4	50	25	STK	04/07/2014	-- Auto Assign -- ▾
<input checked="" type="checkbox"/>	KCD4N43CNA2R	24681	Widget 2	4	50	20	STK	06/16/2014	-- Auto Assign -- ▾

The “Cards Successfully Released”

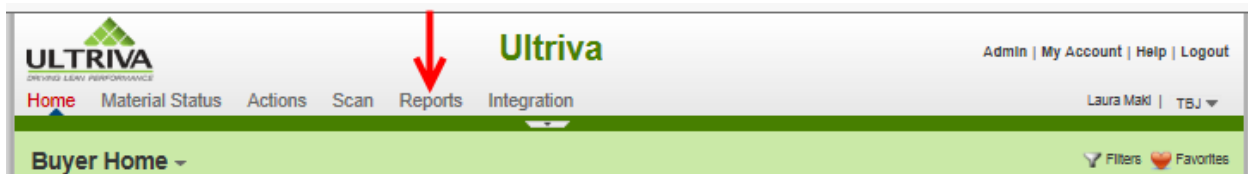
Card ID	Item	Card Qty	Description
KCD4NGCCNANN	24680	100	Released To A&G Machining.
KCD4NMFCNAJ9	24680	100	Released To A&G Machining.
KCD4NMGCNAD4	24680	100	Released To A&G Machining.
KCD4NG9CNAME	24680	100	Released To A&G Machining.

Release Cards - Buyer Status

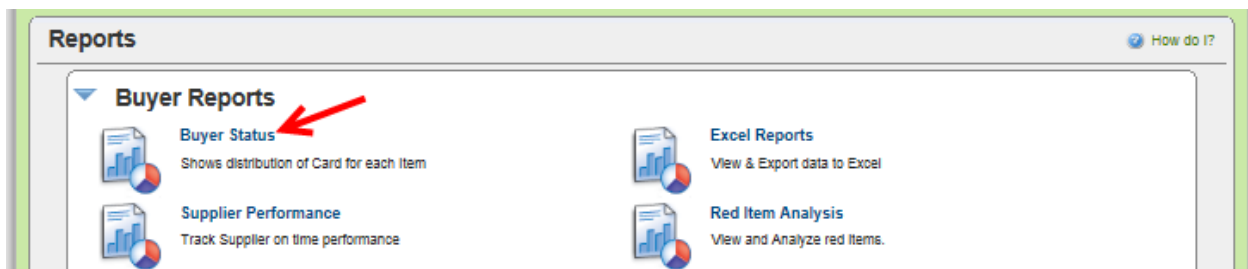


Important – If Ultriva is integrated with the ERP system, check with your Ultriva Administrator to make sure that manually releasing a card will not create integration failures.

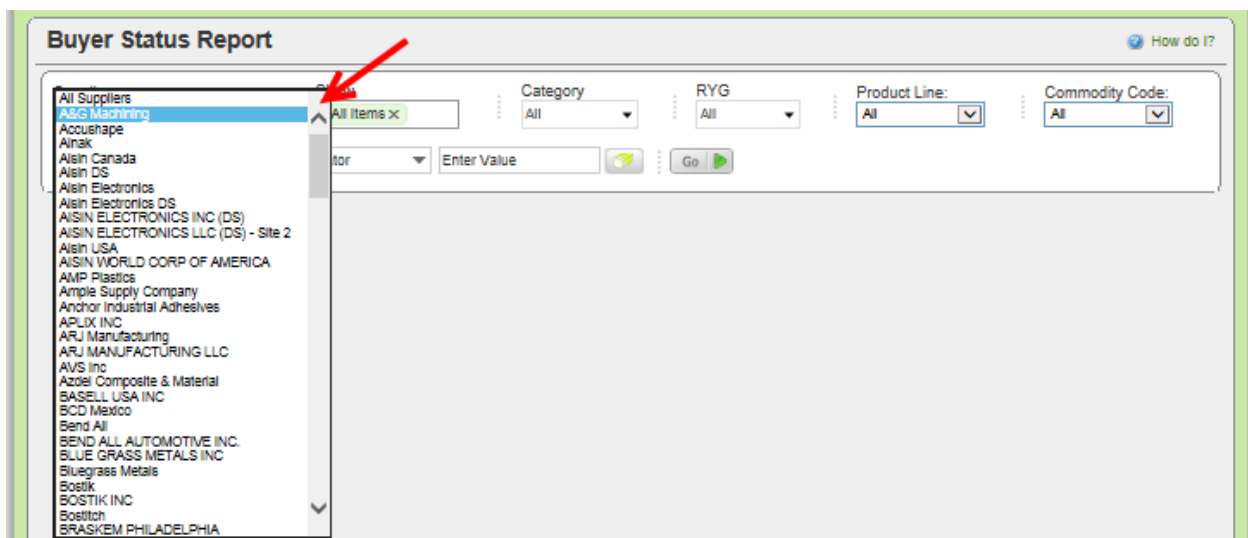
Click on “Reports”



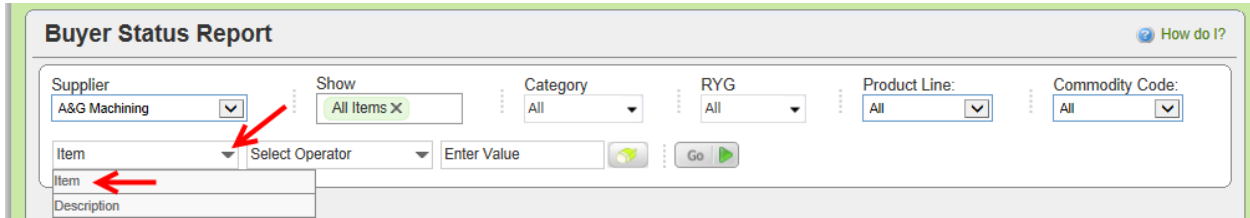
Click on “Buyer Status”



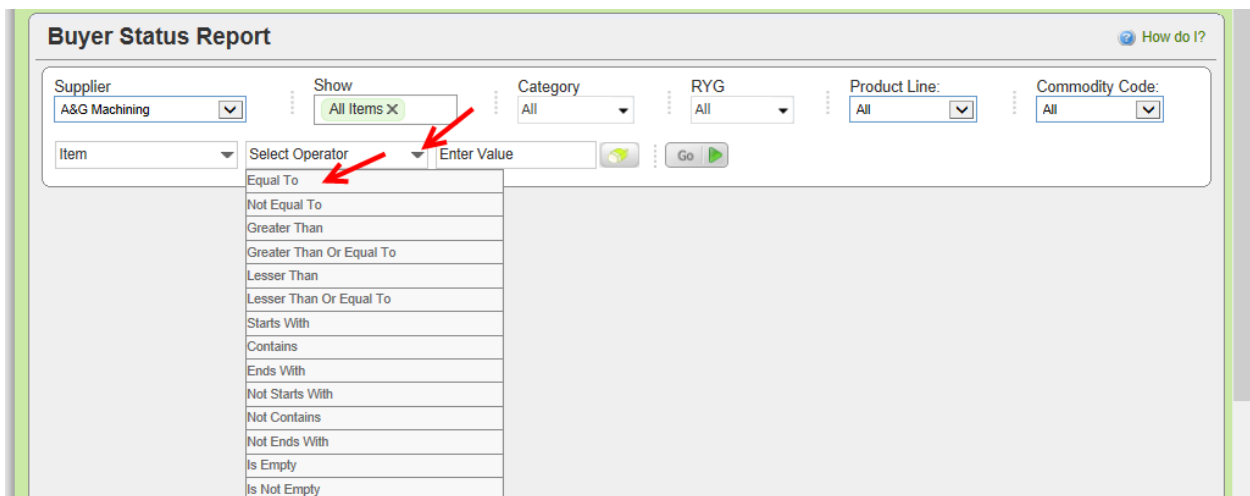
Click on the **dropdown arrow** in the “Supplier” field. Click on the “Supplier”



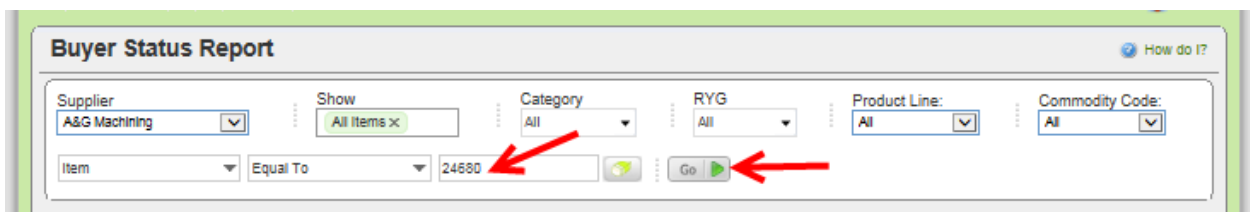
Click on the **dropdown arrow** in the “**Filter By**” field. Click on a “**selection**” *In this example we will select “Item”*



Click on the **dropdown arrow** in the “**Select Operator**” field. Click on a “**selection**” *In this example we will select “Equal To”*



Enter a **value** in the “**Enter Value**” field. Click on the “**Go**” button. *In this example we selected Item/Equal To so the value to be entered is the item number for the Item to be released.*



The “**Buyer Status Report**” appears. In the **On Hand** column, click on the **number of cards** “**On Hand**”

Supplier		Show	Category	RYG	Product Line:	Commodity Code:													
All Suppliers		All Items x	All	All	All	All													
Filter By		Select Operator	Enter Value				Go												
RYG	Item	On Hand		Released		In Process		At Ship Hub		In Transit		Received At Dock		Put Away		Others		Description	
		Cards	Qty	Cards	Qty	Cards	Qty	Cards	Qty	Cards	Qty	Cards	Qty	Cards	Qty	Cards	Qty		
	24680	13	650	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0.0	Widget
	24681	11	275	10	250	24	600	0	0	0	0	0	0	0	0	0	0	0.0	Widget 2



Quick Tip – If an item has more than one supplier, “Auto Assign” will be an option under the “Supplier” column. If left on “Auto Assign, Ultriva will automatically calculate and release the card(s) to the appropriate supplier based on the supplier percentages entered in the supplier set up. If preferred, the supplier can be selected by clicking on the dropdown arrow in the supplier field and choosing the supplier.

Click in the **selection box** at the column heading to **select all cards** or **select the cards individually**. A checkmark will appear. Click on the “**Release**” button.

Card ID	Item	Description	Cycle No	Qty On Card	Card Qty	Location Code	Last Received	Supplier	
<input checked="" type="checkbox"/>	KCD4N34CNA7Y	24681	Widget 2	5	50	25	STK	04/07/2014	-- Auto Assign --
<input checked="" type="checkbox"/>	KCD4N3YCNV2	24681	Widget 2	4	50	25	STK	04/07/2014	-- Auto Assign --
<input checked="" type="checkbox"/>	KCD4N43CNA2R	24681	Widget 2	4	50	20	STK	06/16/2014	-- Auto Assign --

The “**Cards Successfully Released**”

Card ID	Item	Card Qty	Description
KCD4MVHCNAAB	24680	50	Released To A&G Machining.
KCD4MVKCNAR9	24680	50	Released To A&G Machining.
KCD4MV7CNAG5	24680	50	Released To A&G Machining.
KCD4MVACNAN5	24680	50	Released To A&G Machining.

Release Cards Filter



Quick Tip – Further filtering can be performed if you are looking for specific data on the items. All “Filtering” in Ultriva is optional. When all changes have been made to the “Filter”, click on the “Go” button for the changes to take effect. If the parts are not appearing on the Release screen, it is best to double check the filters input first and make the necessary changes.

To further filter for specific data, click on the **dropdown arrow** in the “Supplier” field and a **drop down list** appears. Click on a “Supplier” In this example we will filter for a specific item from a supplier.

The screenshot shows the 'Release Items List' interface. On the left, a dropdown menu is open, listing various suppliers such as 'All Suppliers', 'A&G Machining', 'Accushape', 'Alnak', 'Aisin Canada', 'Aisin DS', 'Aisin Electronics', 'Aisin Electronics DS', 'Aisin Electronics Inc (DS)', 'Aisin Electronics LLC (DS) - Site 2', 'Aisin USA', 'Aisin World Corp of America', 'Ample Supply Company', 'Anchor Industrial Adhesives', 'APLX INC', 'ARJ Manufacturing', 'ARJ Manufacturing LLC', 'AVS Inc', 'Azdel Composite & Material', 'BASELL USA INC', 'BCD Mexico', 'Bend All', 'BEND ALL AUTOMOTIVE INC.', 'BLUE GRASS METALS INC', 'Bluegrass Metals', 'Bostik', 'BOSTIK INC', 'BRASKEM PHILADELPHIA', 'Bridgestone', and 'BRIDGESTONE ARM COMPANY'. A red arrow points to the dropdown arrow in the 'Supplier' field. The main interface shows filter options for 'Cards' (All), 'Show' (Items List), 'Category' (All), and 'RYG' (All). A 'Go' button is visible. Below the filters, a table displays item details:

Description	Total Cards	Total Qty
BEARING	7	70
BEARING-SLEEVE	9	113,400
DU Bearing	7	100,800
Bearing	61	878,400

At the bottom right, it shows '1 to 4 of 4'.

If Applicable: Click on the **drop down arrows** to make the remaining selections. The Cards, Show, Category and RYG should remain as they are below for our example.

The screenshot shows the 'Release Items List' interface with the filter options. The 'Supplier' field is set to 'A&G Machining'. The 'Cards' field is set to 'All', the 'Show' field is set to 'Items List', and the 'Category' field is set to 'All'. The 'RYG' field is set to 'All'. A 'Go' button is visible. Below the filters, there is a 'Find Item' field and a 'Show Cards' button. Red arrows point to the dropdown arrows in the 'Cards', 'Show', and 'Category' fields.



Quick Tip – If applicable: The “Filter” can be further defined.

Click on the **dropdown arrow** in the “**Filter By**” field and a **drop down list** appears. Click on a **selection**. *In this example we will select “Item”.*

Release Items List

Supplier: A&G Machining

Cards: All

Show: Items List

Category: All

RYG: All

Filter By: Item (selected)

Select Operator: []

Enter Value: []

Go

Show Cards

Description	Total Cards	Total Qty
...

Click on the **dropdown arrow** in the “**Select Operator**” field and a **drop down list** appears. Click on a **selection**. *In this example we will select “Equal To”.*

Release Items List

Supplier: A&G Machining

Cards: All

Show: Items List

Category: All

RYG: All

Filter By: Item

Select Operator: Equal To (selected)

Enter Value: []

Go

Show Cards

RYG	Item	Description	Total Cards	Total Qty
24688		...	7	70
ULT-035-0354-00		ING-SLEEVE	9	113,400
ULT-035-0354-02		earing	7	100,800
ULT-035-0355-00		g	61	878,400

Enter a **value** in the “**Enter Value**” field. Click on the “**Go**” button. *In this example we selected Item/Equal To so the value to be entered is the item number.*

Release Items List

Supplier: A&G Machining

Cards: All

Show: Items List

Category: All

RYG: All

Filter By: Item

Select Operator: Equal To


Enter Value: 24681

Go

Show Cards

The information appears for the “Filter” ran for the specific item number.

RYG	Item	Description	Total Cards	Total Qty
	24681	Widget 2	21	525

 **Important** – If for some reason the output does not match what you are looking for, recheck the input in the filter and make the necessary changes. Remember to click on the “Go” button for the changes to take effect.

Click on a link below to **navigate back** to the release screen.

[Released Cards Home Default Screen](#)

[Released Cards Actions Ship Screen](#)

[Released Cards Buyer Queue](#)

[Released Cards Buyer Status](#)