



Ultriva 7.6 and Higher
Manually Set P.O.
Reference Guide

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Manually Set PO

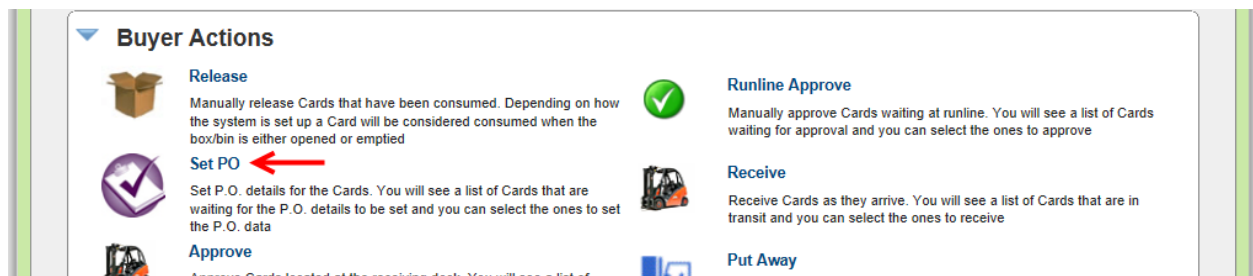


Important – If Ultriva is integrated with the ERP system, check with your Ultriva Administrator to make sure that manually setting a P.O. will not create integration failures.

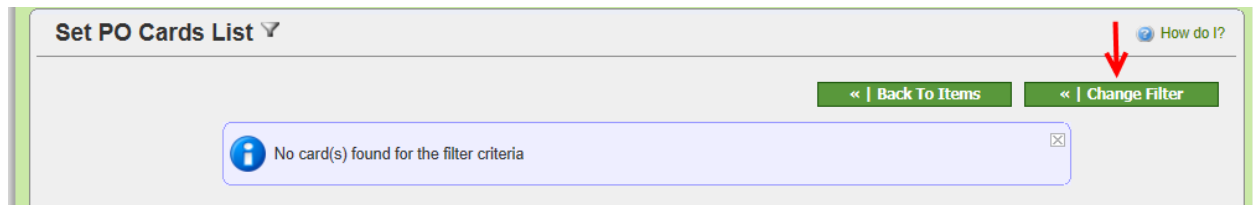
To navigate to “Set P.O.”, click on “Admin”.



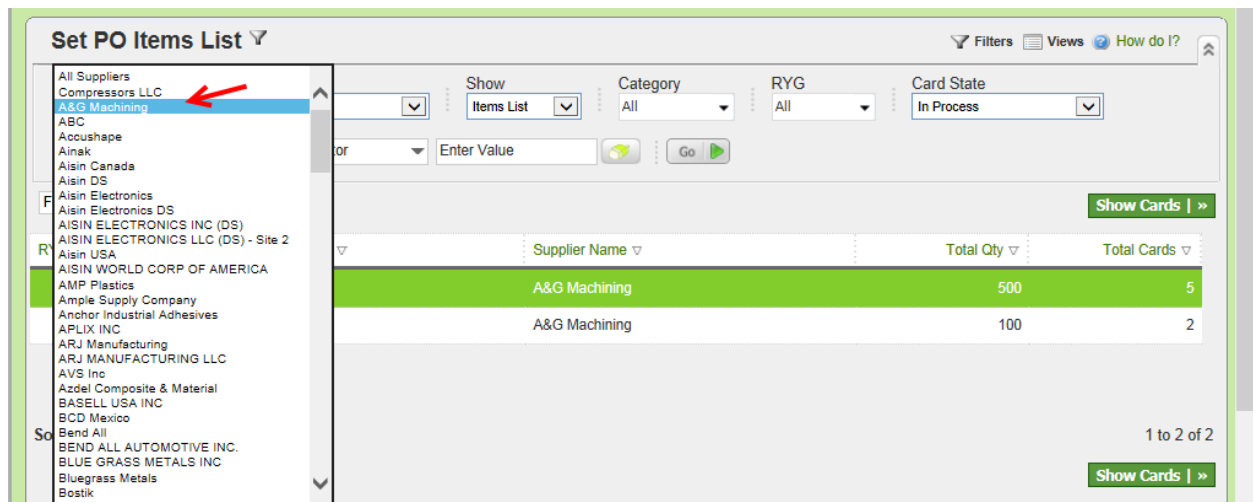
Click on “Set P.O.”



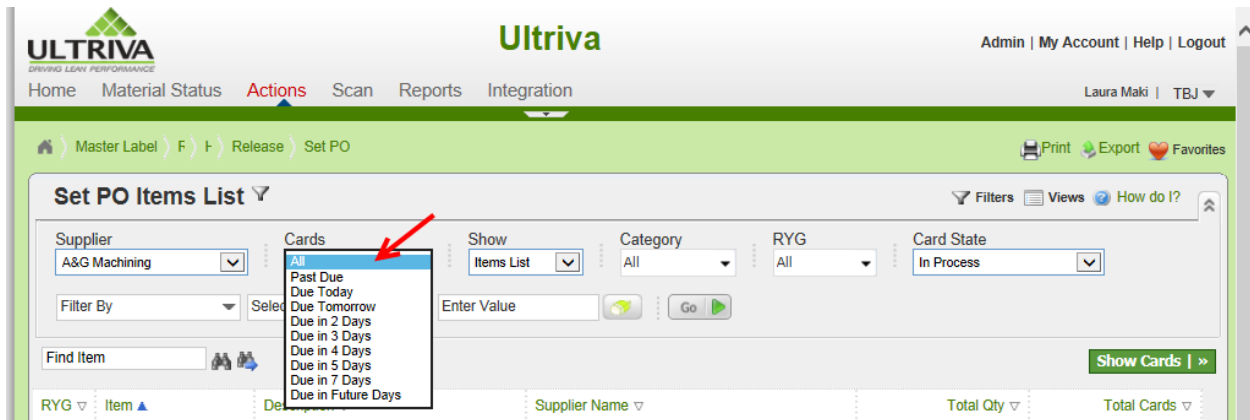
Click on the “Change Filter” button.



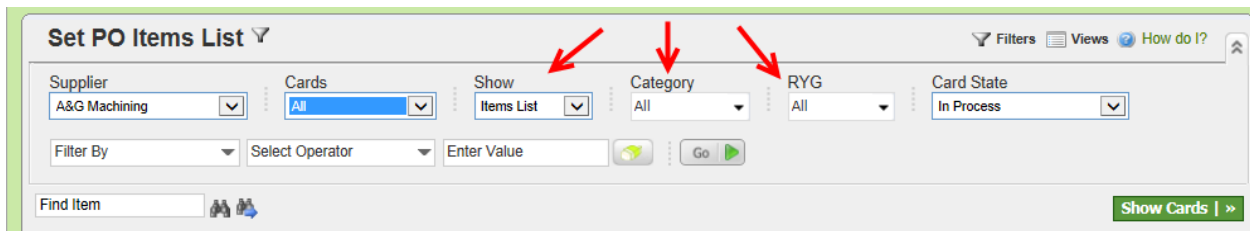
Click on the drop down arrow in the “Supplier” field and select the “Supplier”.



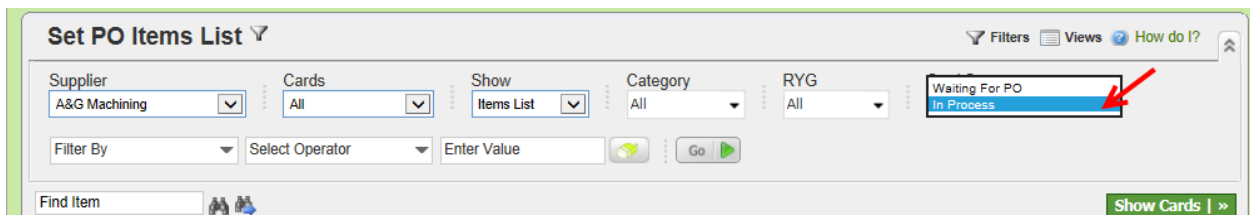
Click on the drop down arrow in the “Cards” field and make a selection.



If applicable: Select a Show, Category or RYG selection

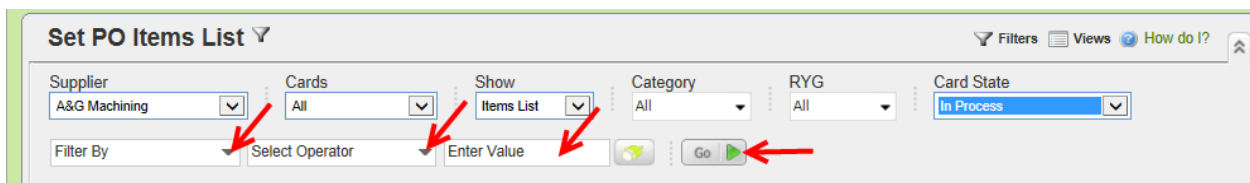


Click on the drop down arrow in the “Card State” field and make a selection.



Quick Tip – To define the filter even further, click on the “Filter By, Selecting Operator and Enter Value” selections

Click on the “Go” button





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

RYG	Item	Description	Supplier Name	Total Qty	Total Cards
	24680	Widget	A&G Machining	800	8

The **filter selections** appear. Click in the **selection box** at the column heading to **select all cards** or select the cards **individually**. A **checkmark** will appear.

<input checked="" type="checkbox"/>	Card ID ▲	Item ▲	Supplier Name ▼	Release Date ▼	Reqd Ship ▼	Reqd Receive ▲	Card Qty ▼	PO #	PO Line #	Release #	Release Line #
<input checked="" type="checkbox"/>	KCD4MV7CNAG5	24680	A&G Machining	06/24/2014	06/25/2014	06/26/2014	100		0		
<input checked="" type="checkbox"/>	KCD4MVHCNAAB	24680	A&G Machining	06/24/2014	06/25/2014	06/26/2014	100		0		
<input checked="" type="checkbox"/>	KCD4MVKCNAR9	24680	A&G Machining	06/24/2014	06/25/2014	06/26/2014	100		0		
<input checked="" type="checkbox"/>	KCD4NGBCNAHK	24680	A&G Machining	06/24/2014	06/25/2014	06/26/2014	100		0		
<input checked="" type="checkbox"/>	KCD4NMHCNABN	24680	A&G Machining	06/24/2014	06/25/2014	06/26/2014	100		0		





Tool Tip – The “Apply to All” icons  are located on all “Action” screens where repeated data is entered. Data such as “P.O. Number and P.O. Line number” is where this tool comes in real handy.

Click in the P.O. # field and type in the “P.O. Number”. Click on the “Apply to All” icon.

P.O. information can also be entered individually under each column.

Set PO Cards List Views How do I?


Find Card ID  Set PO | >> Attach Notes | >> << | Back To Items << | Change Filter



PO. #  PO. Line # Release # Release Line #

<input checked="" type="checkbox"/>	Card ID ▲	Item ▲	Supplier Name ▼	Release Date ▼	Reqd Ship ▼	Reqd Receive ▲	Card Qty ▼	PO #	PO Line #	Release #	Release Line #
<input checked="" type="checkbox"/>	KCD4MV7CNAG5	24680	A&G Machining	06/24/2014	06/25/2014	06/26/2014	100	<input type="text"/>	0	<input type="text"/>	<input type="text"/>
<input checked="" type="checkbox"/>	KCD4MVHCNAAB	24680	A&G Machining	06/24/2014	06/25/2014	06/26/2014	100	<input type="text"/>	0	<input type="text"/>	<input type="text"/>
<input checked="" type="checkbox"/>	KCD4MVKCNAR9	24680	A&G Machining	06/24/2014	06/25/2014	06/26/2014	100	<input type="text"/>	0	<input type="text"/>	<input type="text"/>
<input checked="" type="checkbox"/>	KCD4NGBCNAHK	24680	A&G Machining	06/24/2014	06/25/2014	06/26/2014	100	<input type="text"/>	0	<input type="text"/>	<input type="text"/>
<input checked="" type="checkbox"/>	KCD4NMHCNABN	24680	A&G Machining	06/24/2014	06/25/2014	06/26/2014	100	<input type="text"/>	0	<input type="text"/>	<input type="text"/>

The P.O. numbers have been entered. Repeat the steps to add the “P.O. Line Number”. (If applicable) Add the “Release #” and “Release Line #”

Set PO Cards List Views How do I?

Find Card ID  Set PO | >> Attach Notes | >> << | Back To Items << | Change Filter

PO. #  PO. Line #  Release # Release Line #

<input checked="" type="checkbox"/>	Card ID ▲	Item ▲	Supplier Name ▼	Release Date ▼	Reqd Ship ▼	Reqd Receive ▲	Card Qty ▼	PO #	PO Line #	Release #	Release Line #
<input checked="" type="checkbox"/>	KCD4MV7CNAG5	24680	A&G Machining	06/24/2014	06/25/2014	06/26/2014	100	987654	2000	<input type="text"/>	<input type="text"/>
<input checked="" type="checkbox"/>	KCD4MVHCNAAB	24680	A&G Machining	06/24/2014	06/25/2014	06/26/2014	100	987654	2000	<input type="text"/>	<input type="text"/>
<input checked="" type="checkbox"/>	KCD4MVKCNAR9	24680	A&G Machining	06/24/2014	06/25/2014	06/26/2014	100	987654	2000	<input type="text"/>	<input type="text"/>
<input checked="" type="checkbox"/>	KCD4NGBCNAHK	24680	A&G Machining	06/24/2014	06/25/2014	06/26/2014	100	987654	2000	<input type="text"/>	<input type="text"/>
<input checked="" type="checkbox"/>	KCD4NMHCNABN	24680	A&G Machining	06/24/2014	06/25/2014	06/26/2014	100	987654	2000	<input type="text"/>	<input type="text"/>



Quick Tip – Notes can be added at this time by clicking on the “Attach Notes” button.

Click on the “Set P.O.” button.

Set PO Cards List Views How do I?

Find Card ID

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PO. # PO. Line # Release # Release Line #

<input type="checkbox"/>	Card ID ▲	Item ▲	Supplier Name ▼	Release Date ▼	Reqd Ship ▼	Reqd Receive ▲	Card Qty ▼	PO #	PO Line #	Release #	Release Line #
<input checked="" type="checkbox"/>	KCD4MV7CNAG5	24680	A&G Machining	06/24/2014	06/25/2014	06/26/2014	100	<input type="text" value="987654"/>	<input type="text" value="2000"/>	<input type="text"/>	<input type="text"/>
<input checked="" type="checkbox"/>	KCD4MVHCNAAB	24680	A&G Machining	06/24/2014	06/25/2014	06/26/2014	100	<input type="text" value="987654"/>	<input type="text" value="2000"/>	<input type="text"/>	<input type="text"/>
<input checked="" type="checkbox"/>	KCD4MVKNAR9	24680	A&G Machining	06/24/2014	06/25/2014	06/26/2014	100	<input type="text" value="987654"/>	<input type="text" value="2000"/>	<input type="text"/>	<input type="text"/>
<input checked="" type="checkbox"/>	KCD4NGBNAHK	24680	A&G Machining	06/24/2014	06/25/2014	06/26/2014	100	<input type="text" value="987654"/>	<input type="text" value="2000"/>	<input type="text"/>	<input type="text"/>
<input checked="" type="checkbox"/>	KCD4NMHCNABN	24680	A&G Machining	06/24/2014	06/25/2014	06/26/2014	100	<input type="text" value="987654"/>	<input type="text" value="2000"/>	<input type="text"/>	<input type="text"/>

The “P.O. Set Successfully”

Set PO Cards Results How do I?

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Following cards were successful

Card ID	Item	PO #	PO Line #	Release #	Release Line #	Description
KCD4MV7CNAG5	24680	987654	2,000			PO Set Successfully.
KCD4MVHCNAAB	24680	987654	2,000			PO Set Successfully.
KCD4MVKNAR9	24680	987654	2,000			PO Set Successfully.
KCD4NGBNAHK	24680	987654	2,000			PO Set Successfully.
KCD4NMHCNABN	24680	987654	2,000			PO Set Successfully.