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Ultriva 7.7 and Higher  
Ship Using Certification  
Control  
Reference Guide

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## **Table of Contents**

*(Click to follow link)*

<i>Ship Cards using Certification Control .....</i>	<i>2</i>
<i>Apply to All - Auto Fill.....</i>	<i>8</i>

## Ship Cards using Certification Control



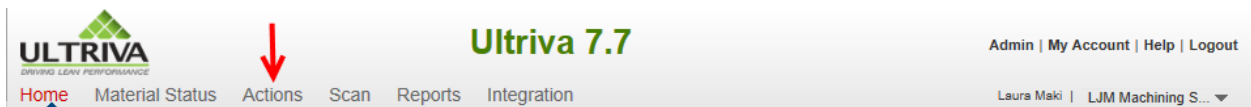
*Quick Tip – If the customer requires the items to have Certification Control, when shipping the goods the certificate must be attached to the order. The process does not allow the supplier to ship without the information added.*

*Certification Control is set up at the item level. A supplier may have all items set up for this process, or only certain items may have it required.*

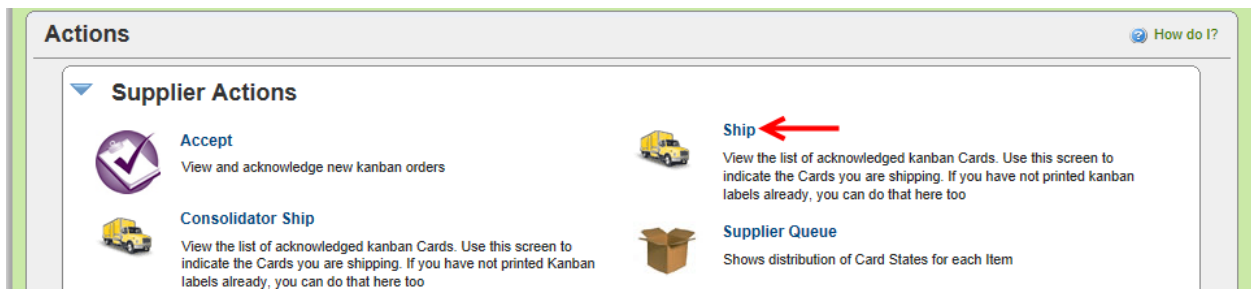
*There are many ways to ship the items, in our example we will use the Actions/Ship process.*

*The “Cards” may have to be “Accepted” by the “Supplier” in order to see the cards on the “Ship” screen.*

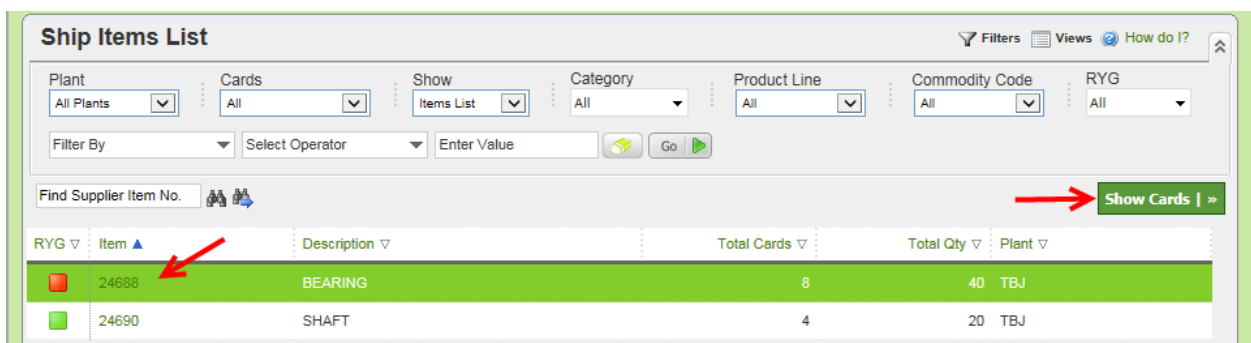
To navigate to the “Ship” screen, click on “Actions”



Click on “Ship”



Click on the **line** for the **item to ship** and the **line will highlight**. Click on the “Show Cards” button.





**Quick Tip** – If an item is shipped without the certificate being attached where the certification is required, it will fail to ship the cards.

Click in the **selection box** next to “**Card ID**” to **select all** of the cards, or **select** the cards **individually**.


The screenshot shows the 'Ship Cards List' interface. At the top, there are search and filter options. Below that, there are input fields for 'Tracking No.', 'Carrier', 'Packing Slip No' (with value 134254), and 'Charge No'. The main part of the interface is a table with columns: Card ID, Supplier Item No., Release Date, Reqd Ship, Reqd Receive, Card Qty, Ship Qty, Packing Slip No, Charge No, PO #, and PC Line #. The first row is highlighted in green. A red arrow points to the checkbox in the 'Card ID' column of the first row.

Card ID	Supplier Item No.	Release Date	Reqd Ship	Reqd Receive	Card Qty	Ship Qty	Packing Slip No	Charge No	PO #	PC Line #
<input checked="" type="checkbox"/> KCD4M3CNAWP	24688	10/29/2014	10/30/2014	11/02/2014	5	5	134254			
<input checked="" type="checkbox"/> KCD4M3CNAWP	24688	10/29/2014	10/30/2014	11/02/2014	5	5	134254			
<input checked="" type="checkbox"/> KCD4M3CNAWP	24688	10/29/2014	10/30/2014	11/02/2014	5	5	134254			
<input checked="" type="checkbox"/> KCD4M3CNAWP	24688	10/29/2014	10/30/2014	11/02/2014	5	5	134254			
<input checked="" type="checkbox"/> KCD4M3CNAWP	24688	10/29/2014	10/30/2014	11/02/2014	5	5	134254			



**Quick Tip** – Per the customer request, adding the “Tracking No.,” “Carrier,” “Packing Slip No.,” “Charge No.” and/or “Supplier Lot No.” may need to be added.



**Tool Tip** – The “Apply to All” icons  are located on all Action screens where repeated data is entered. Data such as Packing Slip, Lot Size, Tracking No., are a few examples where this tool comes in real handy. Enter the data into a field and click on the “Apply to All” icon for that field. The data will then populate for all of the selected cards below.

The screenshot shows the 'Ship Cards List' interface with a filter applied: 'ReqShipDate: < 12/23/2014'. The 'Packing Slip No' field is highlighted, and a red arrow points to the 'Apply to All' icon (a document with a plus sign) next to it.

Click on the link below for detailed instructions on the “Apply to All” functionality.

[Apply to All Auto Fill](#)

If Applicable: **Enter the Tracking No, Carrier, Packing Slip No. or the Charge No. Click on the “Apply to All” icon to populate the data on all selected cards below. Our example is the Packing Slip No.**

Card ID	Supplier Item No.	Release Date	Reqd Ship	Reqd Receive	Card Qty	Ship Qty	Packing Slip No	Charge No
KCD4MZ3CNAWP	24688	10/29/2014	10/30/2014	11/02/2014	5	5	134254	
KCD4MZ4CNATE	24688	10/29/2014	10/30/2014	11/02/2014	5	5	134254	
KCD4MZDCNAXJ	24688	10/29/2014	10/30/2014	11/02/2014	5	5	134254	
KCD4MZHCA2A	24688	10/29/2014	10/30/2014	11/02/2014	5	5	134254	
KCD4MZKCAZ8	24688	10/29/2014	10/30/2014	11/02/2014	5	5	134254	

Click on the “Attach Notes” button

Click on “Attach/Remove”

**Attach notes for card:KCD4MZ2CNA9J**

Priority:  
 Low  Medium  High

Notes:  
 No Notes

Attach files:


Attach/Remove

Enter a “Description” for the document

**Attach file(s) for card: KCD4MZ2CNA9J**

To attach a file, type the path of the file in the field below or click on the **Browse** button to locate it in your computer.

\* Title:

\* Attachment:   


Click on the **Upload File** Title button. Wait till your file appears in the box below. Repeat the process to attach another file.

Click on the “Browse” button and select the file

**Attach file(s) for card: KCD4MZ2CNA9J**

To attach a file, type the path of the file in the field below or click on the **Browse** button to locate it in your computer.

\* Title:

\* Attachment:   


Click on the **Upload File** Title button. Wait till your file appears in the box below. Repeat the process to attach another file.

Click on the “Upload File” button

**Attach file(s) for card: KCD4MZ2CNA9J**

To attach a file, type the path of the file in the field below or click on the **Browse** button to locate it in your computer.

\* Title:

\* Attachment:   

Click on the **Upload File** Title button. Wait till your file appears in the box below. Repeat the process to attach another file.



*Quick Tip – If the wrong file was attached it can be removed.*

Attachments



Title	Action
Certification Item 24688	Remove

The file appears. Click on the “Done” button after uploading the file(s)

Attachments

Title	Action
Certification Item 24688	Remove

Click on the Done button after uploading the file(s)




Click in the box next to “Apply the notes and priority to all selected cards” and a checkmark will appear. Click on the “Ship” button.

Attach files:

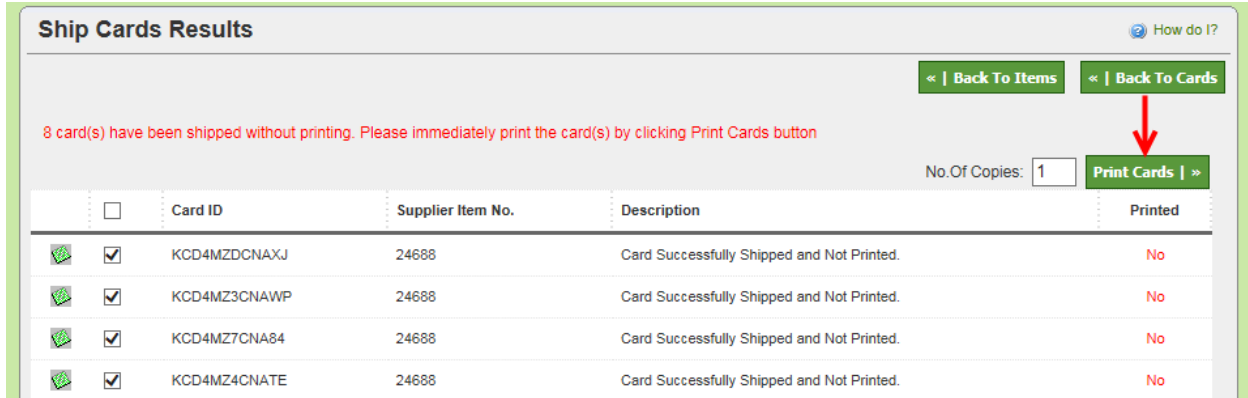
Certification Item 24688

Attach/Remove

Apply this notes and priority to all selected cards

Click on the “Print Cards” button



**Ship Cards Results** How do I?

[« | Back To Items](#) [« | Back To Cards](#)

8 card(s) have been shipped without printing. Please immediately print the card(s) by clicking Print Cards button

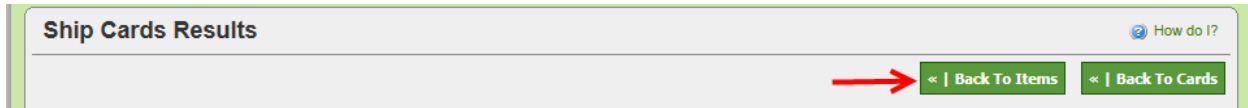
No.Of Copies:  [Print Cards | »](#)

<input type="checkbox"/>	Card ID	Supplier Item No.	Description	Printed
<input checked="" type="checkbox"/>	KCD4MZDCNAXJ	24688	Card Successfully Shipped and Not Printed.	No
<input checked="" type="checkbox"/>	KCD4MZ3CNAWP	24688	Card Successfully Shipped and Not Printed.	No
<input checked="" type="checkbox"/>	KCD4MZ7CNA84	24688	Card Successfully Shipped and Not Printed.	No
<input checked="" type="checkbox"/>	KCD4MZ4CNATE	24688	Card Successfully Shipped and Not Printed.	No

The cards will now print. Affix the cards/labels to the items accordingly.



*Quick Tip – To verify whether all of the cards have shipped, click on the “Back to Items” button and it will state that there are no items to ship.*





**Ship Cards Results** How do I?

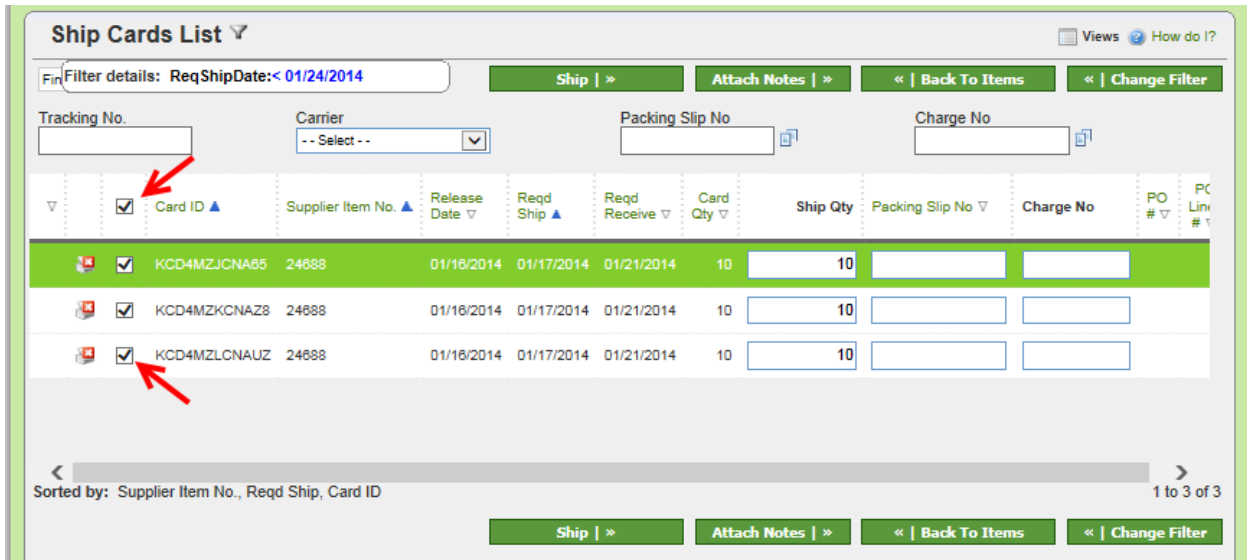
[« | Back To Items](#) [« | Back To Cards](#)



## Apply to All - Auto Fill

 **Tool Tip** – The “Apply to All” icons  are located on all Action screens where repeated data is entered. Data such as Packing Slip, Lot Size, Tracking No., are a few examples where this tool comes in real handy. Enter the data into a field and click on the “Apply to All” icon for that field. The data will then populate for all of the selected cards below.

Click in the “selection box” at the column header to select all cards or select each one individually. A checkmark will appear for that selection.




Ship Cards List Views How do I?

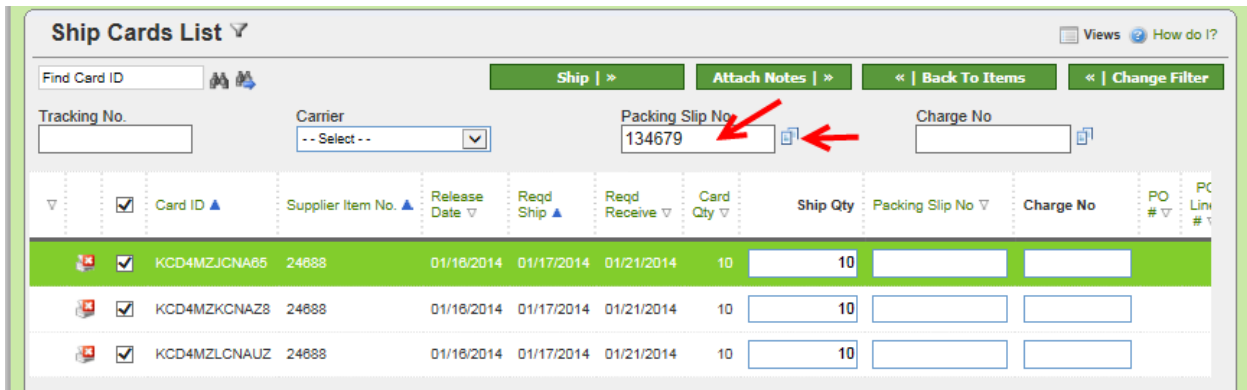
Filter details: ReqShipDate:< 01/24/2014

Tracking No. Carrier: -- Select -- Packing Slip No. Charge No.

<input checked="" type="checkbox"/>	Card ID ▲	Supplier Item No. ▲	Release Date ▼	Reqd Ship ▲	Reqd Receive ▼	Card Qty ▼	Ship Qty	Packing Slip No ▼	Charge No	PO # ▼	PC Line # ▼
<input checked="" type="checkbox"/>	KCD4MZJCNA65	24888	01/16/2014	01/17/2014	01/21/2014	10	10				
<input checked="" type="checkbox"/>	KCD4MZKCAZ8	24888	01/16/2014	01/17/2014	01/21/2014	10	10				
<input checked="" type="checkbox"/>	KCD4MZLCNAUZ	24888	01/16/2014	01/17/2014	01/21/2014	10	10				

Sorted by: Supplier Item No., Reqd Ship, Card ID 1 to 3 of 3

Enter the “Packing Slip” number (if applicable), and click on the “Apply to All” icon”. 



Ship Cards List Views How do I?

Find Card ID

Tracking No. Carrier: -- Select -- Packing Slip No. 134679 Charge No.

<input checked="" type="checkbox"/>	Card ID ▲	Supplier Item No. ▲	Release Date ▼	Reqd Ship ▲	Reqd Receive ▼	Card Qty ▼	Ship Qty	Packing Slip No ▼	Charge No	PO # ▼	PC Line # ▼
<input checked="" type="checkbox"/>	KCD4MZJCNA65	24888	01/16/2014	01/17/2014	01/21/2014	10	10				
<input checked="" type="checkbox"/>	KCD4MZKCAZ8	24888	01/16/2014	01/17/2014	01/21/2014	10	10				
<input checked="" type="checkbox"/>	KCD4MZLCNAUZ	24888	01/16/2014	01/17/2014	01/21/2014	10	10				

The **data** is **now populated** in each line item checked. *Process complete.*

**Ship Cards List** Views How do I?

Filter details: ReqShipDate:< 01/24/2014 Ship | » Attach Notes | » « | Back To Items « | Change Filter

Tracking No.  Carrier  Packing Slip No  Charge No

<input type="checkbox"/>	Card ID ▲	Supplier Item No. ▲	Release Date ▼	Reqd Ship ▲	Reqd Receive ▼	Card Qty ▼	Ship Qty	Packing Slip No ▼	Charge No	PO # ▼	PC Line # ▼
<input checked="" type="checkbox"/>	KCD4MZJCNA65	24888	01/16/2014	01/17/2014	01/21/2014	10	<input type="text" value="10"/>	<input type="text" value="134679"/>	<input type="text"/>		
<input checked="" type="checkbox"/>	KCD4MZKCAZ8	24888	01/16/2014	01/17/2014	01/21/2014	10	<input type="text" value="10"/>	<input type="text" value="134679"/>	<input type="text"/>		
<input checked="" type="checkbox"/>	KCD4MZLCNAUZ	24888	01/16/2014	01/17/2014	01/21/2014	10	<input type="text" value="10"/>	<input type="text" value="134679"/>	<input type="text"/>		

Sorted by: Supplier Item No., Reqd Ship, Card ID 1 to 3 of 3

Ship | » Attach Notes | » « | Back To Items « | Change Filter

[Return to Shipping Cards](#)