



**Ultriva 8.0 and Above
Ship Using Serial Control
Reference Guide**

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Ship Cards using Serial Number Control



Important – Serial Number Required at Ship is set at the item level by the customer and may only be required for certain items.

If the customer requires an item to have serial numbers, they have to be added to each card when shipping. This process does not allow shipment until the serial numbers have been added.



Quick Tip – 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”

The screenshot shows the Upland Ultriva Home dashboard. The top navigation bar is green with the text 'upland Ultriva'. Below it is a 'Home' section with a house icon. The main content area is divided into two sections. The first section is 'Inventory Health (Items - Stock Out Risk)' and contains three cards: a red card for '4 Items High', an orange card for '4 Items Medium', and a green card for '20 Items Low'. The second section is 'My Routines' and contains two tabs: 'DAILY' and 'MONTHLY'. Under the 'DAILY' tab, there are links for 'Accept Orders' and 'Print Kanban Orders'. Under the 'MONTHLY' tab, there are links for 'Ship Goods' and 'Reschedule Request'. A red arrow points to the 'Actions' button in the left sidebar.

Click on “Ship”

The screenshot shows the 'Supplier Actions' menu in Upland Ultriva. The menu is titled 'Supplier Actions' and contains 14 actions arranged in a grid. A red arrow points to the 'Ship' action. The actions are: Accept (View and acknowledge new kanban orders), Recall (If you incorrectly marked a Card as shipped. Use this screen to undo the shipment transaction. You will need to know the kanban Card id to undo a shipment), Set Tracking/Packing Slip Numbers (View the list of shipped kanban Cards. Use this screen to update the tracking number for the shipped Cards), Print PO (View the list of POs and print PO), Ship (View the list of acknowledged kanban Cards. Use this screen to indicate the Cards you are shipping. If you have not printed kanban labels already, you can do that here too), Reschedule Request (Change required date for the orders. You will see a list of Cards that can be rescheduled and you can select the ones to reschedule), Set WorkOrder No. (View the list of acknowledged kanban Cards. Use this screen to update the workorder number for the acknowledged Cards), Supply Planning (Supply Planning), Consolidator Ship (View the list of acknowledged kanban Cards. Use this screen to indicate the Cards you are shipping. If you have not printed Kanban labels already, you can do that here too), Print Labels (View the list of acknowledged kanban Cards. Use this screen if you want to print labels before you are ready to ship), Master Label (Create master label for shipment), Request Quality Approval (Attach material certificate), Supplier Queue (Shows distribution of Card States for each Item), Print Duplicate Labels (View the list of printed kanban Cards. Use this screen if you want to print duplicate labels), Add Notes (Add notes to one or more Cards in cycle), and Invoice Creation (Invoice creation page).

If you ship to multiple plants and the plant selected is not correct, **click** the “x” next to the plant name, then **press the space bar** to get a listing of available plants and **select the correct one** from the list. Select any desired filter then **click** on the “Go” button.

Or enter the “Supplier Item No” in the box and then click the “Binoculars.”

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

| RYG | Supplier Item No | Description | Plant Item No | Total Cards | Total Qty | Plant |
|----------------------|----------------------|---------------------------|-----------------|-------------|-----------|-----------|
| 15-61636/021-0165-00 | 15-61636/021-0165-00 | dog leash | ULT-021-0166-00 | 6 | 30 | Plant One |
| 15-61646/021-0165-00 | 15-61646/021-0165-00 | Dog collar for large dogs | ULT-021-0165-00 | 2 | 6 | Plant One |
| 438962 | 438962 | Test | 458962 | 9 | 45 | Plant One |
| LJM-555 | LJM-555 | Lori Test Item 555 | LJM-555 | 1 | 25 | Plant One |



Quick Tip – If you see “Serial No.” under the “Ship Qty” that means that the serial number is required for that item. Each “Serial No” by line must be selected and the serial numbers added in order to ship the cards.



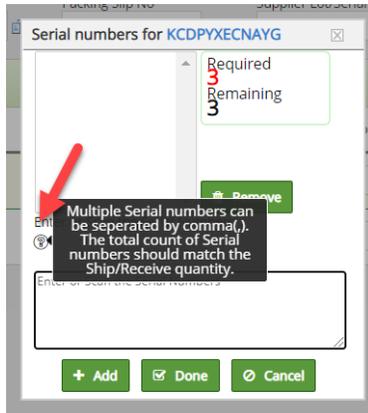
Important – If the quantity needs to be changed, it must be done before Serial No. is selected.

Click in the **selection box** on the **left** and a **checkmark** will appear. **Click** on “Serial No.”

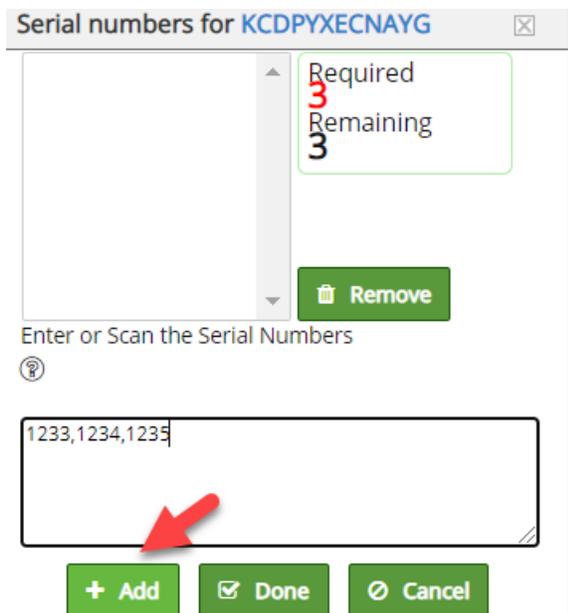
| Find Card ID | Card ID | Supplier Item No. | Release Date | Reqd Ship | Reqd Receive | Manufacture Date | Expiration Date | Card Qty | Ship Qty | Supplier Lot/Serial # | Packing Slip No | PO # | PD Line # |
|--------------|-------------------------------------|-------------------|----------------------|------------|--------------|------------------|-----------------|----------|----------|-----------------------|-----------------|--------|-----------|
| | <input checked="" type="checkbox"/> | KCDPYXECNAYG | 15-61646/021-0165-00 | 09/25/2020 | 10/02/2020 | 10/06/2020 | | 3 | 3 | Serial No. | | 346472 | 0 |
| | <input checked="" type="checkbox"/> | KCDPYXFCNA32 | 15-61646/021-0165-00 | 09/25/2020 | 10/02/2020 | 10/06/2020 | | 3 | 3 | Serial No. | | 346472 | 0 |



Quick Tip – Hover the mouse over the question mark for a “How Do I” explanation.



Enter the “Serial Numbers” separated by a comma. Click on the “Add” button





Quick Tip – Once the “Remaining” number is zero, the card can be shipped as the entire quantity on the card has been accounted for. If you make a mistake you can click the one that is wrong, then click “Remove” and add the corrected serial number.

Click on the “Done” button

Serial numbers for **KCDPYXECNAYG**

1233
1234
1235

Required
3
Remaining
0

Remove

Enter or Scan the Serial Numbers

Enter or Scan the Serial Numbers

+ Add Done Cancel



Quick Tip – Add the serial numbers to the remaining cards to be shipped.

Ship Cards List

Find Card ID

Tracking No. Carrier: ETD Manufacture date: 09/28/2020 Expiration date: 09/28/2020 Packing Slip No. Supplier Lot/Serial #

Sorted by: Supplier Item No., Req'd Ship, Card ID

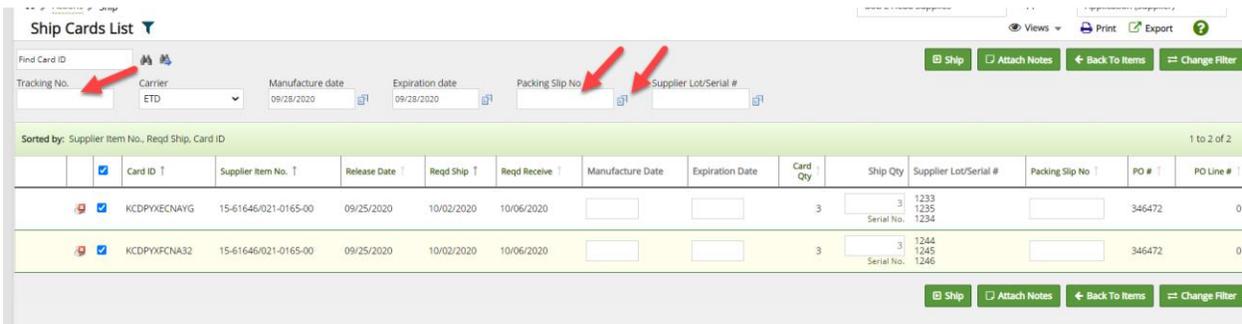
| Card ID | Supplier Item No. | Release Date | Req'd Ship | Req'd Receive | Manufacture Date | Expiration Date | Card Qty | Ship Qty | Supplier Lot/Serial # | Packing Slip No. | PO # | PO Line # |
|--------------|----------------------|--------------|------------|---------------|------------------|-----------------|----------|---------------------------|-----------------------|------------------|--------|-----------|
| KCDPYXECNAYG | 15-61646/021-0165-00 | 09/25/2020 | 10/02/2020 | 10/06/2020 | | | 3 | 3 1233 1235 1234 | | | 346472 | 0 |
| KCDPYFCNA32 | 15-61646/021-0165-00 | 09/25/2020 | 10/02/2020 | 10/06/2020 | | | 3 | 3 1244 1245 1246 | | | 346472 | 0 |



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.



Ship Cards List

Find Card ID

Tracking No. Carrier: ETD Manufacture date: 09/28/2020 Expiration date: 09/28/2020 Packing Slip No. Supplier Lot/Serial #

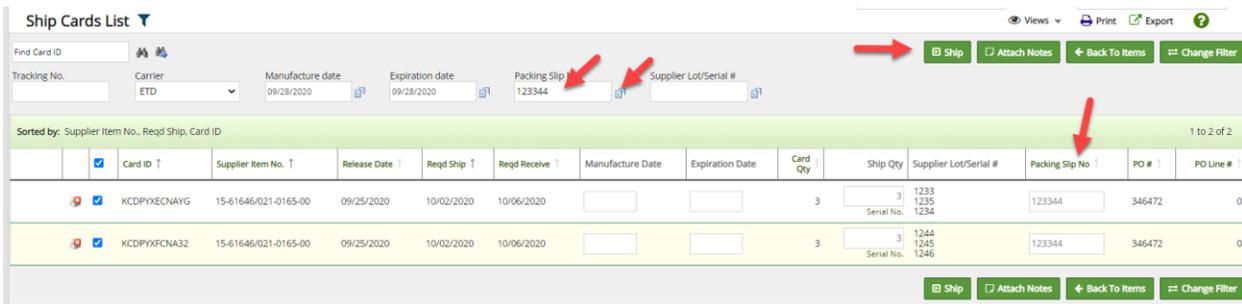
Sorted by: Supplier Item No., Req'd Ship, Card ID

| <input type="checkbox"/> | Card ID ↑ | Supplier Item No. ↑ | Release Date ↑ | Req'd Ship ↑ | Req'd Receive ↑ | Manufacture Date | Expiration Date | Card Qty | Ship Qty | Supplier Lot/Serial # | Packing Slip No. ↑ | PO # ↑ | PO Line # ↑ |
|-------------------------------------|--------------|----------------------|----------------|--------------|-----------------|------------------|-----------------|----------|----------|------------------------------------|--------------------|--------|-------------|
| <input checked="" type="checkbox"/> | KCDPYECNAYG | 15-61646/021-0165-00 | 09/25/2020 | 10/02/2020 | 10/06/2020 | | | 3 | 3 | 1233 1235 1234 Serial No. | | 346472 | 0 |
| <input checked="" type="checkbox"/> | KCDPYXFCNA32 | 15-61646/021-0165-00 | 09/25/2020 | 10/02/2020 | 10/06/2020 | | | 3 | 3 | 1244 1245 1246 Serial No. | | 346472 | 0 |

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



If applicable: Add the necessary information for **Tracking No, Carrier, Packing Slip No. and Charge No.** Click on the “Ship” button.



Ship Cards List

Find Card ID

Tracking No. Carrier: ETD Manufacture date: 09/28/2020 Expiration date: 09/28/2020 Packing Slip No. Supplier Lot/Serial #

Sorted by: Supplier Item No., Req'd Ship, Card ID

| <input type="checkbox"/> | Card ID ↑ | Supplier Item No. ↑ | Release Date ↑ | Req'd Ship ↑ | Req'd Receive ↑ | Manufacture Date | Expiration Date | Card Qty | Ship Qty | Supplier Lot/Serial # | Packing Slip No. ↑ | PO # ↑ | PO Line # ↑ |
|-------------------------------------|--------------|----------------------|----------------|--------------|-----------------|------------------|-----------------|----------|----------|------------------------------------|--------------------|--------|-------------|
| <input checked="" type="checkbox"/> | KCDPYECNAYG | 15-61646/021-0165-00 | 09/25/2020 | 10/02/2020 | 10/06/2020 | | | 3 | 3 | 1233 1235 1234 Serial No. | 123344 | 346472 | 0 |
| <input checked="" type="checkbox"/> | KCDPYXFCNA32 | 15-61646/021-0165-00 | 09/25/2020 | 10/02/2020 | 10/06/2020 | | | 3 | 3 | 1244 1245 1246 Serial No. | 123344 | 346472 | 0 |

Click on the “Print Cards” button

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

No. Of Copies: Use Plant To Supplier Setting Use Plant Setting Use Input Value 1

| <input type="checkbox"/> | Card ID | Supplier Item No. | Description | Printed |
|-------------------------------------|--------------|----------------------|--|---------|
| <input checked="" type="checkbox"/> | KCDPYXECNAYG | 15-61646/021-0165-00 | Card successfully shipped and not printed. | No |
| <input checked="" type="checkbox"/> | KCDPYXFCNA32 | 15-61646/021-0165-00 | Card successfully shipped and not printed. | No |

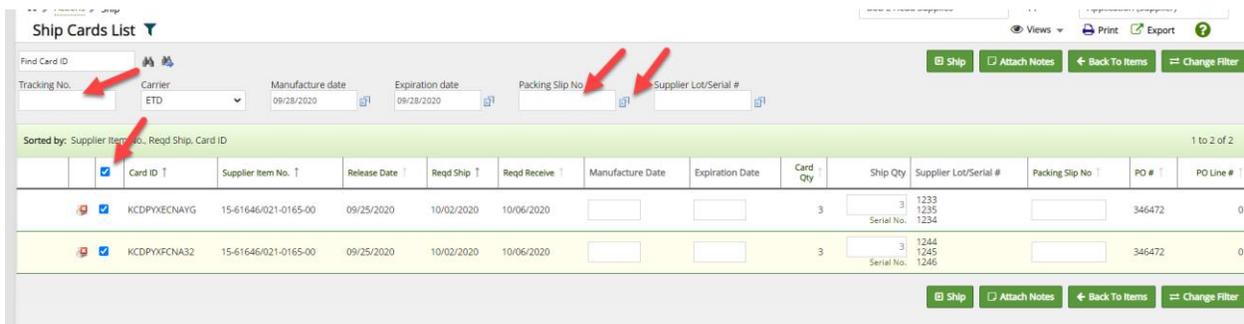
The cards will now print, Process Complete

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.

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



Ship Cards List

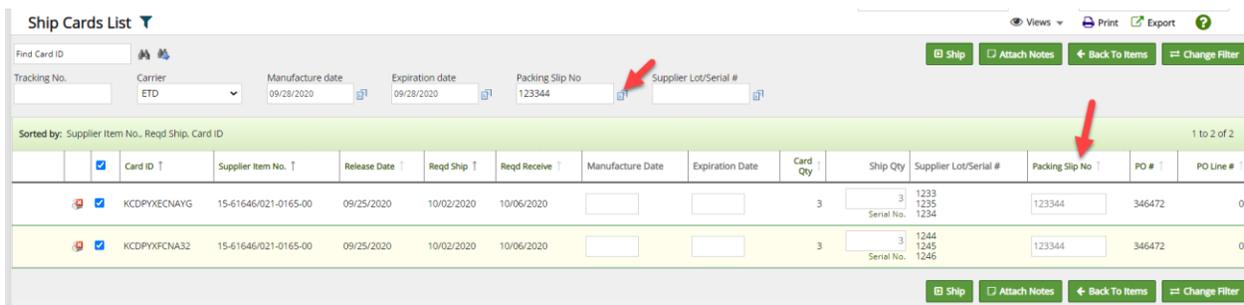
Find Card ID

Tracking No. ETD Carrier Manufacture date 09/28/2020 Expiration date 09/28/2020 Packing Slip No. Supplier Lot/Serial #

Sorted by: Supplier Item No., Req'd Ship, Card ID

| <input type="checkbox"/> | <input checked="" type="checkbox"/> | Card ID ↑ | Supplier Item No. ↑ | Release Date ↑ | Req'd Ship ↑ | Req'd Receive ↑ | Manufacture Date | Expiration Date | Card Qty | Ship Qty | Supplier Lot/Serial # | Packing Slip No. ↑ | PO # ↑ | PO Line # ↑ |
|-------------------------------------|-------------------------------------|--------------|----------------------|----------------|--------------|-----------------|------------------|-----------------|----------|----------|------------------------------------|--------------------|--------|-------------|
| <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | KCDPYXECNAYG | 15-61646/021-0165-00 | 09/25/2020 | 10/02/2020 | 10/06/2020 | | | 3 | 3 | 1233 1235 1234 Serial No. | | 346472 | 0 |
| <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | KCDPYXFCNA32 | 15-61646/021-0165-00 | 09/25/2020 | 10/02/2020 | 10/06/2020 | | | 3 | 3 | 1244 1245 1246 Serial No. | | 346472 | 0 |

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



Ship Cards List

Find Card ID

Tracking No. ETD Carrier Manufacture date 09/28/2020 Expiration date 09/28/2020 Packing Slip No. 123344 Supplier Lot/Serial #

Sorted by: Supplier Item No., Req'd Ship, Card ID

| <input type="checkbox"/> | <input checked="" type="checkbox"/> | Card ID ↑ | Supplier Item No. ↑ | Release Date ↑ | Req'd Ship ↑ | Req'd Receive ↑ | Manufacture Date | Expiration Date | Card Qty | Ship Qty | Supplier Lot/Serial # | Packing Slip No. ↑ | PO # ↑ | PO Line # ↑ |
|-------------------------------------|-------------------------------------|--------------|----------------------|----------------|--------------|-----------------|------------------|-----------------|----------|----------|------------------------------------|--------------------|--------|-------------|
| <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | KCDPYXECNAYG | 15-61646/021-0165-00 | 09/25/2020 | 10/02/2020 | 10/06/2020 | | | 3 | 3 | 1233 1235 1234 Serial No. | 123344 | 346472 | 0 |
| <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | KCDPYXFCNA32 | 15-61646/021-0165-00 | 09/25/2020 | 10/02/2020 | 10/06/2020 | | | 3 | 3 | 1244 1245 1246 Serial No. | 123344 | 346472 | 0 |

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