



Ultriva 7.6 and Higher
Rules and Alerts
Part 1
Reference Guide

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Navigate to Rules



Quick Tip – Rules allow users to set up “Alerts that are generated when an event happens or does not happen”. An Alert can be shown in the browser when a user logs into Ultriva, sent via email, or both.



Important – Rules can be set at the “System” or “Local” level. To add a rule at the system level, the user must be an APP CSR (superuser). If “Adding” or “making changes” to a rule at the “System” level, contact Ultriva for assistance. If using integration, there may be integration rules that may be affected.

Most rules should be created at the “Local” level. Prior to setting up a “Rule” check to see if there is a rule already created. No need to duplicate “Emails” and “Alerts” that are already being sent to the users.

Once a rule is created, if the cards are already “In Cycle” it will not apply to the cards until they complete the cycle and/or are “Released”

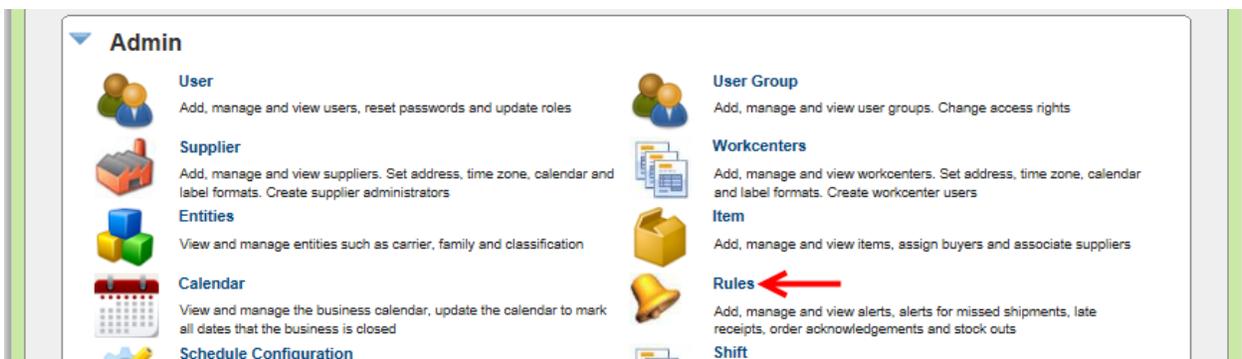


Tool Tip – Prior to creating a rule, there are a few pre-requisites to look at. Who will receive the “Alerts”? How will the alerts be sent? What is the subject?

To navigate to “Creating a Rule”, click on “Admin”



Click on “Rules”



The “**Rule List**” appears with tabs for the “**System**” and the “**Local**” rules

The “*Rule: that will be set up - “When a card is Released to a Supplier”.*”



Quick Tip – Check the existing rules first to see if a “Rule” has already been created. Check both “System and Local” rules.

Rule List Filters Views How do I?

Rule Type: KanbanCard

Filter By Select Operator Enter Value Go

Find Rule Title

Add Edit Delete Enable Preview Rule

System Rules Local Rules

| Rule Type | Rule Title | Rule Description | Notify To | Business Name | Browser? | Email? | Table? |
|------------|-------------------------|---|--|---------------|----------|--------|--------|
| KanbanCard | Blanket Order Quantity | Notify users When Blanket Qty is below 0 days of UsagePerDay. Apply this rule to Items: KITM27KVCNA76 and Suppliers: BSU238WCNAMB | Buyer User,Supplier User,makil | TBJ | | | |
| KanbanCard | Buyer Reschedule | Notify users when reschedule is requested by buyer. Apply this rule to Items: all Items and Suppliers: all suppliers | Buyer User,Purchase User,Supplier User,Supplier Contacts | TBJ | ✓ | ✓ | |
| KanbanCard | Late Shipment | Notify users when goods are due. Fire this alert immediately after Required shipment date expires. Apply this rule to Items: all Items and Suppliers: all Suppliers | Buyer User,Supplier User,bdority | TBJ | ✓ | ✓ | |
| KanbanCard | Order Released | Send an Alert to Supplier when a new order/card is released. Apply this rule to Items: all Items and Suppliers: all suppliers | Buyer User,Purchase User,Supplier User,Supplier Contacts,lmconeely | TBJ | ✓ | | |
| KanbanCard | Recall Notice | Send an alert when a Card is recalled. Apply this rule to Items: all Items and Suppliers: all suppliers | Buyer User,Supplier User,makil | TBJ | ✓ | | |
| KanbanCard | Reject Reschedule | Notify users when reschedule is rejected by buyer. Apply this rule to Items: all Items and Suppliers: all suppliers | Buyer User,Purchase User,Supplier User,Supplier Contacts | TBJ | ✓ | ✓ | |
| KanbanCard | short shipment alert | Notify users when goods are short shipped. Fire the alert with in 0 minutes | Buyer User,Supplier User,ultrivauser | TBJ | ✓ | | |
| KanbanCard | Supplier Note With Card | Notify users when notes added to the card with 3 or 1 or 4 or 2 priority. Apply this rule to Items: all Items and Suppliers: all suppliers | Buyer User | TBJ | ✓ | ✓ | |
| KanbanCard | Supplier Reschedule | Notify users when reschedule is requested by supplier. Apply this rule to Items: all Items and Suppliers: all suppliers | Buyer User,Purchase User,Supplier User,Supplier Contacts | TBJ | ✓ | ✓ | |



Important – If there is a checkmark under the “Table” column, do not edit this rule. This rule is tied to the integration rules.

Rule List Filters Views How do I?

Rule Type: KanbanCard

Filter By Select Operator Enter Value Go

Preview Rule

System Rules Local Rules

| Rule Type | Rule Title | Rule Description | Notify To | Business Name | Browser? | Email? | Table? |
|------------|-------------------------|------------------|------------------------|---------------|----------|--------|--------|
| KanbanCard | Po Create Rule | | TableEboRIFPoCreateDef | | | | ✓ |
| KanbanCard | Po Receive Rule | | TableEboRIFPoCreateDef | | | | ✓ |
| KanbanCard | ProductionSequence Rule | | TableEboRIFPoCreateDef | | | | ✓ |

If you see a **“RED X”** the rule has been disabled. If this is the rule that is needed, **click** on the **“Rule”** and **click** on the **“Enable”** button.

The screenshot shows the 'Rule List' interface. At the top, there are filters for 'Rule Type' (set to 'KanbanCard'), 'Filter By', 'Select Operator', and 'Enter Value'. A search bar 'Find Rule Title' is also present. A pie chart indicates that 88.9% of rules are Enabled (green) and 11.1% are Disabled (red). Below the filters are buttons for 'Add', 'Edit', 'Delete', 'Enable', and 'Preview Rule'. The 'Enable' button is highlighted with a red arrow. The table below shows two rules. The first rule, 'Blanket Order Quantity', is disabled (indicated by a red 'X' in the 'Rule Type' column) and is highlighted in green. The second rule, 'Buyer Reschedule', is enabled (indicated by a green checkmark in the 'Rule Type' column).

| Rule Type | Rule Title | Rule Description | NotifyTo | Business Name | Browser? | Email? | Table? |
|-----------|--------------------------------------|---|--|---------------|----------|--------|--------|
| | KanbanCard Blanket Order Quantity | Notify users When Blanket Qty is below 3 days of UsagePerDay. Apply this rule to Items: KITM27KVCNA76 and Suppliers: BSU238WCNAMB | Buyer User,Supplier User,makil | TBJ | | | |
| | KanbanCard Buyer Reschedule | Notify users when reschedule is requested by buyer. Apply this rule to Items: all Items and Suppliers: all suppliers | Buyer User,Purchase User,Supplier User,Supplier Contacts | TBJ | | | |

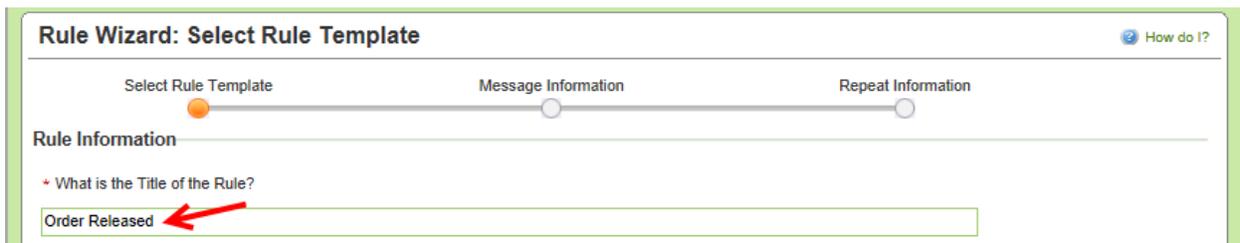
Setting up a Rule

Click on the “Local” rules tab. Click on the “Add” button.



The screenshot shows the 'Rule List' interface. At the top, there are options for 'Rule Type' (set to 'KanbanCard'), 'Filter By', 'Select Operator', and 'Enter Value'. A pie chart indicates that 88.9% of rules are Enabled (green) and 11.1% are Disabled (red). Below the chart are buttons for 'Add', 'Edit', 'Delete', 'Enable', and 'Preview Rule'. At the bottom, there are tabs for 'System Rules' and 'Local Rules', with 'Local Rules' being the active tab. Red arrows point to the 'Add' button and the 'Local Rules' tab.

Enter a “Title”



The screenshot shows the 'Rule Wizard: Select Rule Template' screen. A progress bar at the top indicates the current step is 'Select Rule Template'. Below the progress bar, the 'Rule Information' section contains a question: '* What is the Title of the Rule?'. The text input field below this question contains the text 'Order Released', which is highlighted with a red arrow.

Click on the “Rule” and the line will highlight. Click on the “Select” button.



The screenshot shows the 'Rule Wizard: Select Rule Template' screen. The 'Rule Information' section still contains the question '* What is the Title of the Rule?' with the text 'Order Released'. Below this, the 'Notify the Users' section contains a list of rules. The first rule, 'Card/Order Released to Supplier', is highlighted in blue. A red arrow points to this rule. To the right of the list is a green 'Select' button, with another red arrow pointing to it.

The “**Rule**” description appears. Additional filtering can now be completed. Click on “[all Items](#)”.

all Items and Suppliers: [all suppliers](#)'. A red arrow points to the 'all Items' link."/>

Rule Wizard: Select Rule Template How do I?

Select Rule Template Message Information Repeat Information

Rule Information

What is the Title of the Rule?
Order Released

Notify the Users

- Card/Order Released to Supplier
- When Some Action takes place
- When Notes with specific priority added
- When AppStatus changes
- When Goods are due
- When Goods are short shipped
- Potential Stock-out
- When cards are not accepted

Select

Rule Description

Send an Alert to Supplier when a new order/card is released. Apply this rule to Items: [all Items](#) and Suppliers: [all suppliers](#)

A “**Pop Up**” box appears. Specific “**Item Numbers**” can be chosen at this time. (If applicable) To select an “**Item Number**” click in the box and a checkmark will appear. Click on the “**Apply**” button. For this example we want “*All Items*” so we will cancel out of this by clicking on the “*Cancel*” button.

Select Field Values

| | | |
|---|---|---|
| <input checked="" type="checkbox"/> 24680 | <input type="checkbox"/> 24681 | <input type="checkbox"/> 24687 |
| <input type="checkbox"/> 24688 | <input type="checkbox"/> 24689 | <input type="checkbox"/> 41410-010P9-00 |
| <input type="checkbox"/> 41410-030K7-00 | <input type="checkbox"/> 41410-030M5-B1 | <input type="checkbox"/> 41410-040P4-B0 |
| <input type="checkbox"/> 41410-110P2-E0 | <input type="checkbox"/> 41410-120M5-B1 | <input type="checkbox"/> 41410-140P4-B1 |
| <input type="checkbox"/> 41410-210P2-B0 | <input type="checkbox"/> 41410-220M5-B0 | <input type="checkbox"/> 41410-240P4-E0 |
| <input type="checkbox"/> 41410-320M5-E0 | <input type="checkbox"/> 41410-340P4-B0 | <input type="checkbox"/> 41410-420M2-00 |
| <input type="checkbox"/> 41410-440P4-B0 | <input type="checkbox"/> 41410-640P4-E0 | <input type="checkbox"/> 58293-X1B00-00 |
| <input type="checkbox"/> 58293-X1B01-00 | <input type="checkbox"/> 58293-X1B02-00 | <input type="checkbox"/> 58293-X1B07-00 |
| <input type="checkbox"/> 58293-X1B08-00 | <input type="checkbox"/> 58293-X1B09-00 | <input type="checkbox"/> 58293-X1B10-00 |
| <input type="checkbox"/> 58293-X1B11-00 | <input type="checkbox"/> 58293-X1B12-00 | <input type="checkbox"/> 58293-X1B13-00 |
| <input type="checkbox"/> 58293X1B2700 | <input type="checkbox"/> 58293X1B3600 | <input type="checkbox"/> 58293X1B3700 |
| <input type="checkbox"/> 58293X1B3800 | <input type="checkbox"/> 58293X1B3900 | <input type="checkbox"/> 58293X1B4000 |
| <input type="checkbox"/> 58293X1B4300 | <input type="checkbox"/> 58293X1B4400 | <input type="checkbox"/> 585100R011B2 |

Apply Clear Cancel

Click on “[all suppliers](#)” (If applicable). To select a “Supplier(s)” click in the box and a checkmark will appear. Click on the “Apply” button. For this example we want “All Suppliers” so we will cancel out of this by clicking on the “Cancel” button.

Select Field Values

| | | |
|---|--|--|
| <input checked="" type="checkbox"/> A&G Machining | <input type="checkbox"/> Accushape | <input type="checkbox"/> Ainak |
| <input type="checkbox"/> Aisin Canada | <input type="checkbox"/> Aisin DS | <input type="checkbox"/> Aisin Electronics |
| <input type="checkbox"/> Aisin Electronics DS | <input type="checkbox"/> AISIN ELECTRONICS INC (DS) | <input type="checkbox"/> AISIN ELECTRONICS LLC (DS) - Site 2 |
| <input type="checkbox"/> Aisin USA | <input type="checkbox"/> AISIN WORLD CORP OF AMERICA | <input type="checkbox"/> AMP Plastics |
| <input type="checkbox"/> Ample Supply Company | <input type="checkbox"/> Anchor Industrial Adhesives | <input type="checkbox"/> APLIX INC |
| <input type="checkbox"/> ARJ Manufacturing | <input type="checkbox"/> ARJ MANUFACTURING LLC | <input type="checkbox"/> AVS Inc |
| <input type="checkbox"/> Azdel Composite & Material | <input type="checkbox"/> BASELL USA INC | <input type="checkbox"/> BCD Mexico |
| <input type="checkbox"/> Bend All | <input type="checkbox"/> BEND ALL AUTOMOTIVE INC. | <input type="checkbox"/> BLUE GRASS METALS INC |
| <input type="checkbox"/> Bluegrass Metals | <input type="checkbox"/> Bostik | <input type="checkbox"/> BOSTIK INC |
| <input type="checkbox"/> Bostitch | <input type="checkbox"/> BRASKEM PHILADELPHIA | <input type="checkbox"/> Bridgestone |
| <input type="checkbox"/> BRIDGESTONE APM COMPANY | <input type="checkbox"/> Campi | <input type="checkbox"/> Car Sup1 |

Apply **Clear** **Cancel**

Click on the “Next” button

* Rule Description

Send an Alert to Supplier when a new order/card is released. Apply this rule to Items: [all Items](#) and Suppliers: [all suppliers](#)

* Required field

Next | > **X | Cancel**

Message Information

Make a decision on how the message should be sent. “Browser or Email” For this example we will choose “Browser”

Message Information

* Send message via: Table Browser Email

Preview Rule



Quick Tip – If Email is selected, a new selection box appears called “Grouping”. This will group the alerts and send one email per the selected timeframe.

Message Information

* Send message via: **Preview Rule**

Table Browser Email Grouping: **None**

* Message Recipient:

Buyer User Supplier User Quality User Purchase User Supplier Contact

Every 1 Hour
Every 2 Hour(s)
Every 4 Hour(s)
Every 8 Hour(s)
Every 12 Hour(s)
Every 24 Hour(s)

Make a decision on whom to “Send” this too. By default the “Buyer User” and “Supplier” user are selected. The “Users” listed are the “Users Assigned to the Item”

* Message Recipient:

Buyer User Supplier User Quality User Purchase User Supplier Contact

For a better understanding of “Users Assigned to the Item” below is a screen shot of the “Users” Assigned during the “Item Set UP”.

Coordinator Information

* Item: ? ?

NCR Owner: ? Additional Quality User: x ?

* Supplier User: ?

Additional Contacts: ?

Add additional users names if needed. **Click in the box below** and **enter the first letter** of the “User’s Name” and a drop down list will appear. **Click on the “User”** to select.

* Message Recipient:

Buyer User Supplier User Quality User Purchase User Supplier Contact



Quick Tip –

“Insert Field” - input existing information into the subject

“Clear Field” – clear the data in the field

“Verify Syntax” – verify that the rule is set up correctly

“Default Subject” – predefined subjects that are will automatically populate into the rule

• Message Subject: Insert Field Clear Value Verify Syntax Default Subject

In the “**Message Subject**” field, **click** on the “**Default Subject**” The predefined **information** appears.

The “*Default Subject (message) is going to state, “Card is Released For Item No.”*”



Important – Do not change any data inside the brackets. These are “Predefined Message Subjects” and are tied to a database.

Rule Wizard: Message Information How do I?

Select Rule Template Message Information Repeat Information

Message Information

• Send message via: Preview Rule

Table Browser Email

• Message Recipient:

Buyer User Supplier User Quality User Purchase User Supplier Contact

Imcneely x makil x

• Message Subject: Insert Field Clear Value Verify Syntax Default Subject

Card [KC:BPFL_GID] is Released for Item: [ITM:ItemNo]



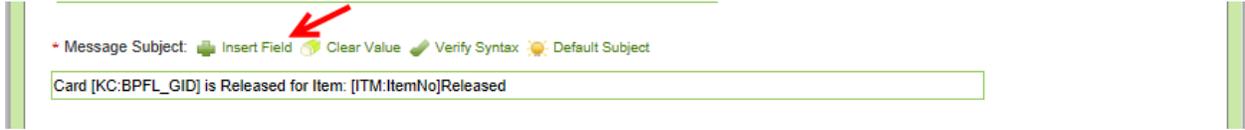
Quick Tip – Additional information can be added to the message subject. For the example below, we will add the “Released Date”.

To “**Add**” to the “**Message Subject**” the “**Released**” date, **click** in the “**Message Subject**” field next to the text in the brackets **[ITM ItemNo]**. Type in “**Released**”.

• Message Subject: Insert Field Clear Value Verify Syntax Default Subject

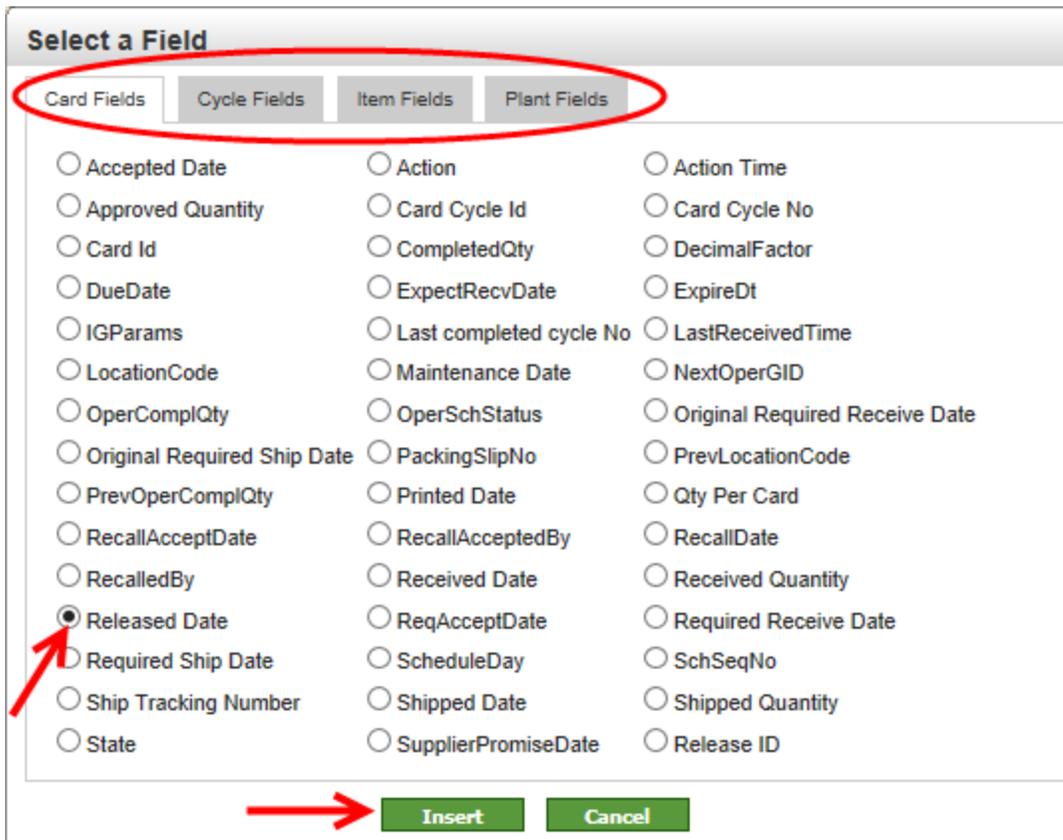
Card [KC:BPFL_GID] is Released for Item: [ITM:ItemNo]Released

Click on “Insert Field”



A “Pop Up” box appears. Specific “Fields” can be chosen at this time. (If applicable) Click on the “Tabs” below to view the options. For this example we want “Released Date” added to our Message Subject.

With the “Cards” tab selected, click in the circle to select “Released Date”. Click on the “Insert” button.



The **Released Date** will now be “**Added**” to the “**Message Subject**”.



Message Subject:  Insert Field  Clear Value  Verify Syntax  Default Subject

Card [KC:BPFL_GID] is Released for Item: [ITM:ItemNo]Released[KC:ReleaseDate]

Message Body



Quick Tip – The “Default Body” (if selected) will automatically populate values predefined by Ultriva.

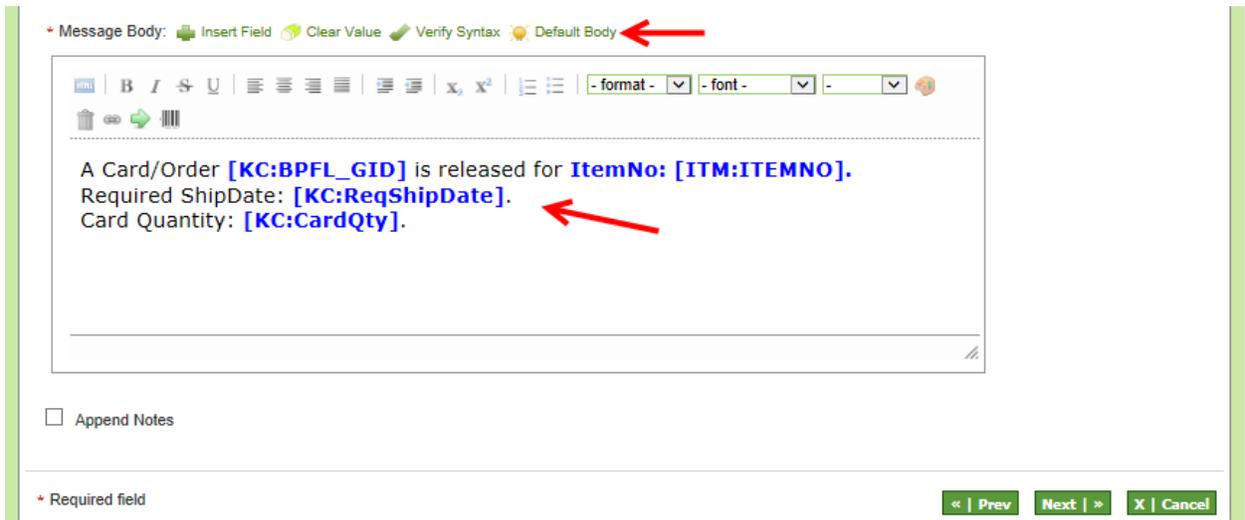
For this example we will use the “Default Body”

Click on “Default Body”, the information appears.

This is stating- “The card, is released for this item, the required ship date and card quantity”



Important – Do not change any data inside the brackets. These are “Predefined Message Bodies” and are tied to a database.



Message Body:  Insert Field  Clear Value  Verify Syntax  Default Body



A Card/Order [KC:BPFL_GID] is released for ItemNo: [ITM:ITEMNO].
Required ShipDate: [KC:ReqShipDate].
Card Qty: [KC:CardQty].

Append Notes

* Required field



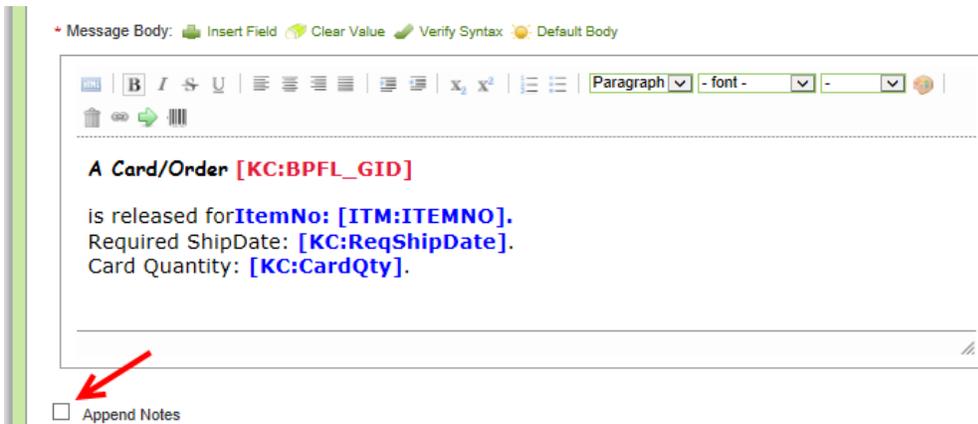
Quick Tip – The “Message Body” can be modified to your liking. This is similar to modifying a document. Bold font, spaces, extra lines and such can be added to make the “Alert” look different than the original one currently set.

To “Modify” the “Message Body” all “Actions” are in the “Red” box. You can change font color, change font style, drop a line down as you would in a document. These are just a few of the many modification options below.

 Links can also be imbedded into the rule with the icons to the left.



If “Append Notes” is “check marked”, if a note is attached to an “Order Released”, the note will be appended to the “Message Body”. For this example, we will not select it.



Click on the “Preview Rule” button to preview the “Alert” that will be sent.

Rule Wizard: Message Information How do I?

Select Rule Template Message Information Repeat Information

Message Information

* Send message via: **Preview Rule**

Table Browser Email Grouping:

* Message Recipient:

Buyer User Supplier User Quality User Purchase User Supplier Contact

* Message Subject:

* Message Body:

A Card/Order [KC:BPFL_GID]

is released for **ItemNo: [ITM:ITEMNO]**.
Required ShipDate: **[KC:ReqShipDate]**.
Card Quantity: **[KC:CardQty]**.

The “Alert” appears. Click on the “Close” button to return to the “Message Information” screen.

Preview Rule: Orders Released

From: Ultriva Lean Suite

To:

Subject:

A Card/Order KCD4NENCNABB

is released for **ItemNo: SampleItem**.
Required ShipDate: **1899-01-01 00:00:00**.
Card Quantity: **0.0000**.



Click on the “Next” button.

* Message Body: Insert Field Clear Value Verify Syntax Default Body

A Card/Order [KC:BPFL_GID]
is released for ItemNo: [ITM:ITEMNO].
Required ShipDate: [KC:ReqShipDate].
Card Quantity: [KC:CardQty].

Append Notes

* Required field

< | Prev **Next** | > X | Cancel



Quick Tip – The “Repeat Information” dictates how many times the “Alert” will sent and how often to send it. This is a great tool when setting up a supplier rule for late shipments. An alert would be sent until the supplier ships the goods or the Alert expires.

The “Repeat Information” screen appears. Make your selection and click on the “Finish” button

Rule Wizard: Repeat Information How do I?

Select Rule Template Message Information Repeat Information

Repeat Information

Repeat: Times (0 = no repeat)

Every: Days

* Required field

< | Prev **Finish** | > X | Cancel

The “Orders Released Rule Added Successfully”

The screenshot shows the 'Rule List' interface. At the top, a blue notification box states 'Rule Orders Released added Successfully' with a red arrow pointing to it. Below this, the 'Rule Type' is set to 'KanbanCard'. A search bar and filter controls are visible. A pie chart on the right indicates that 80.0% of rules are Enabled (green) and 20.0% are Disabled (red). Below the controls, there are tabs for 'System Rules' and 'Local Rules'. A table lists the rules:

| Rule Type | Rule Title | Rule Description | NotifyTo | Business Name | Browser? | Email? | Table? |
|--------------|------------------------|---|--|---------------|----------|--------|--------|
| ✗ KanbanCard | Blanket Order Quantity | Notify users When Blanket Qty is below 3 days of UsagePerDay. Apply this rule to Items: KITM27KVCNA76 and Suppliers: BSU238WCNAMB | Buyer User,Supplier User,makil | TBJ | ✓ | | |
| ✓ KanbanCard | Buyer Reschedule | Notify users when reschedule is requested by buyer. Apply this rule to Items: all Items and Suppliers: all suppliers | Buyer User,Purchase User,Supplier User,Supplier Contacts | TBJ | ✓ | ✓ | |
| ✓ KanbanCard | Late Shipment | Notify users when goods are due. Fire this alert immediately after Required shipment date expires. Apply this rule to Items: all Items and Suppliers: all Suppliers | Buyer User,Supplier User,bdority | TBJ | ✓ | ✓ | |
| ✗ KanbanCard | Order Released | Send an Alert to Supplier when a new order/card is released. Apply this rule to Items: all Items and Suppliers: all suppliers | Buyer User,Purchase User,Supplier User,Supplier Contacts,lmconeely | TBJ | ✓ | | |
| ✓ KanbanCard | Orders Released | Send an Alert to Supplier when a new order/card is released. Apply this rule to Items: all Items and Suppliers: all suppliers | Buyer User,Supplier User,bdority,lmconeely | TBJ | | | |

The “**Preview Rule**” can be accessed from this screen also.

This screenshot is identical to the one above, but with a red arrow pointing to the 'Preview Rule' button in the control bar below the table.

Preview Rule: Orders Released

From: Ultriva Lean Suite

To:

Subject: Card KCD4NEVCNALT is Released for Item: SampleItemReleased1899-01-01 00:00:00

A Card/Order KCD4NEVCNALT

is released for **ItemNo: SampleItem.**
Required ShipDate: **1899-01-01 00:00:00.**
Card Quantity: **0.0000.**

The “Alert” will now populate from the “Home” screen in Ultriva. **Click** on the **icon** to view the “Alert”

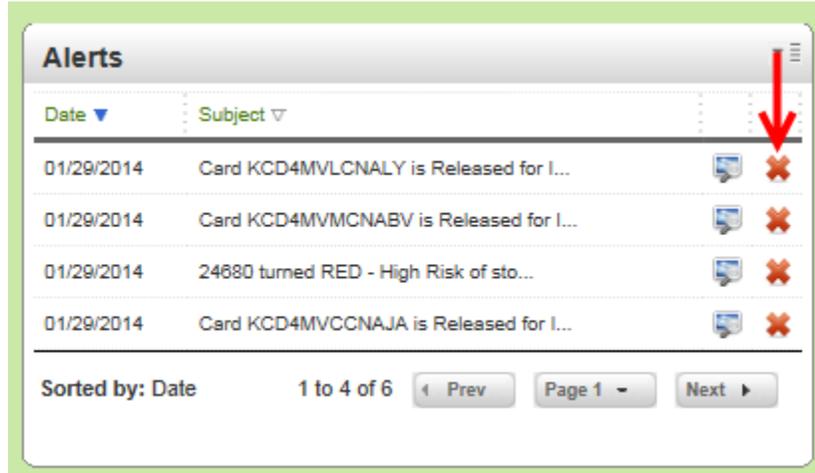
| Date ▾ | Subject ▾ | | |
|------------|--|--|--|
| 01/29/2014 | Card KCD4MVLNALLY is Released for I... | | |
| 01/29/2014 | Card KCD4MVMCNABV is Released for I... | | |
| 01/29/2014 | 24680 turned RED - High Risk of sto... | | |
| 01/29/2014 | Card KCD4MVCCNAJA is Released for I... | | |

Sorted by: Date 1 to 4 of 6 Prev Page 1 Next

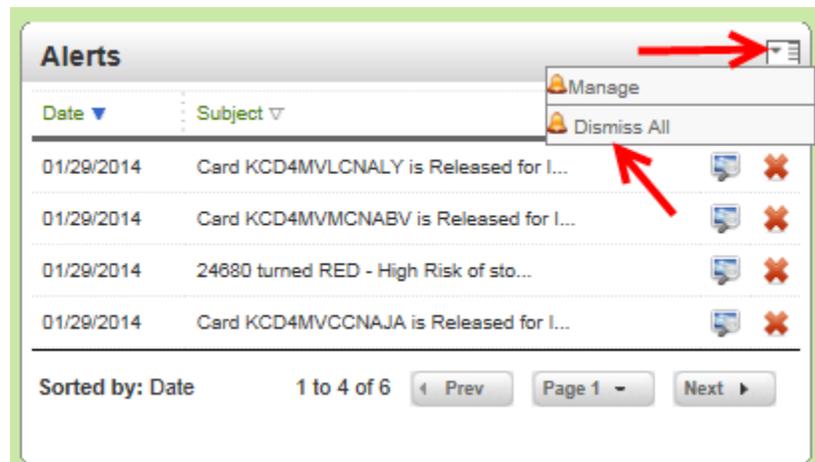
A Card/Order KCD4MYMCNARC

is released for **ItemNo: 24687.**
Required ShipDate: **2014-01-30 08:31:18.**
Card Quantity: **50.0000.**

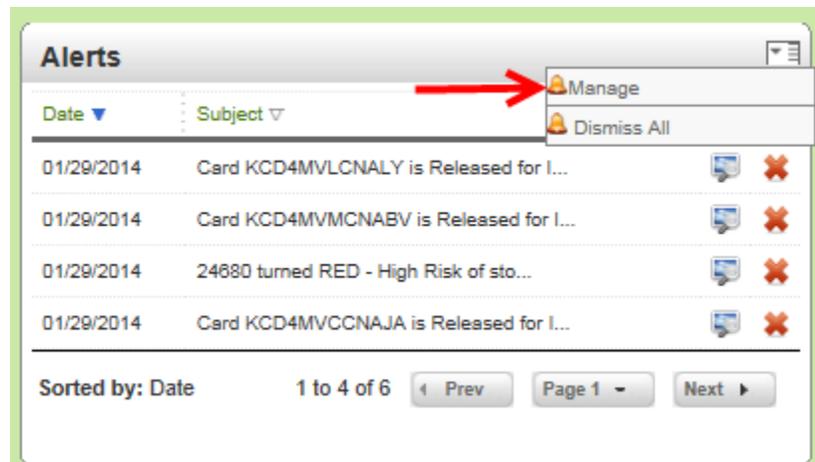
To delete and “Alert”, click on the “Red X”



To delete “All Alerts” click on the drop down arrow in the upper right hand corner. Select “Dismiss All”



To manage the “Alerts” click on “Manage”



This allows the user to view and /or dismiss (delete) the “Alerts”

The screenshot shows a web interface titled "Alerts List" with a search and filter section at the top. Two red arrows point to the "Filter By" and "Select Operator" dropdown menus. Below the search section are navigation buttons: "Prev", "Next", "Dismiss", "Dismiss All", and "Back". The main area contains a table of alerts with columns for "Date", "Subject", and "SourceID". The first row is highlighted in green. To the right of the table is a text area labeled "Alert Message" containing the text "Card Released". At the bottom, there is a sorting section with "Sorted by: Date", "1 to 10 of 18", and "Page 1" navigation buttons.

| <input type="checkbox"/> | Date ▾ | Subject ▾ | SourceID ▾ |
|--------------------------|------------|--|--------------|
| <input type="checkbox"/> | 01/29/2014 | KCD4MZ9CNAZK-003-8 | KCD4MZ9CNAZK |
| <input type="checkbox"/> | 01/29/2014 | Card KCD4MZ9CNAZK is Released for I... | KCD4MZ9CNAZK |
| <input type="checkbox"/> | 01/29/2014 | 24688 turned RED - High Risk of sto... | KCD4MZ9CNAZK |
| <input type="checkbox"/> | 01/29/2014 | KCD4MZACNAW4-003-5 | KCD4MZACNAW4 |
| <input type="checkbox"/> | 01/29/2014 | Card KCD4MZACNAW4 is Released for I... | KCD4MZACNAW4 |
| <input type="checkbox"/> | 01/29/2014 | 24688 turned RED - High Risk of sto... | KCD4MZACNAW4 |
| <input type="checkbox"/> | 01/29/2014 | KCD4MZBCNA5E-003-2 | KCD4MZBCNA5E |
| <input type="checkbox"/> | 01/29/2014 | Card KCD4MZBCNA5E is Released for I... | KCD4MZBCNA5E |
| <input type="checkbox"/> | 01/29/2014 | KCD4MZMCNA3U-003-9 | KCD4MZMCNA3U |
| <input type="checkbox"/> | 01/29/2014 | Card KCD4MZMCNA3U is Released for I... | KCD4MZMCNA3U |

Edit a Rule

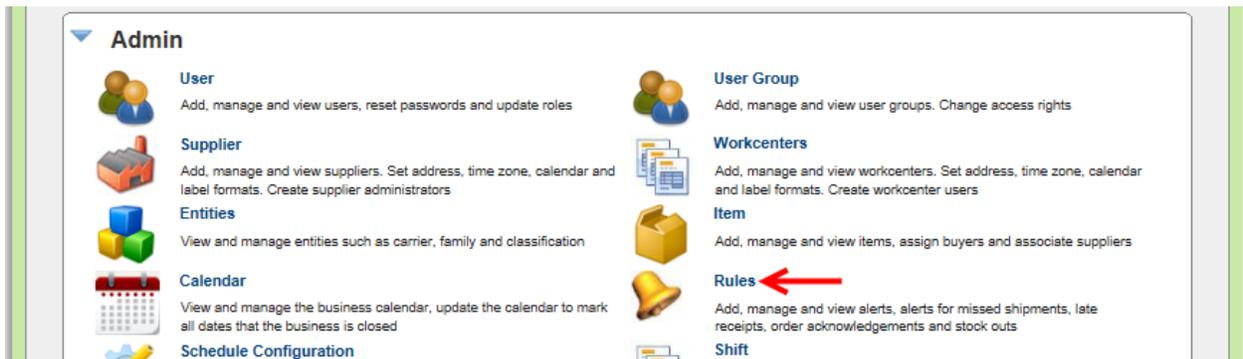


Quick Tip – A “Rule” can be edited if additional information needs to be added or if information would need to be deleted.

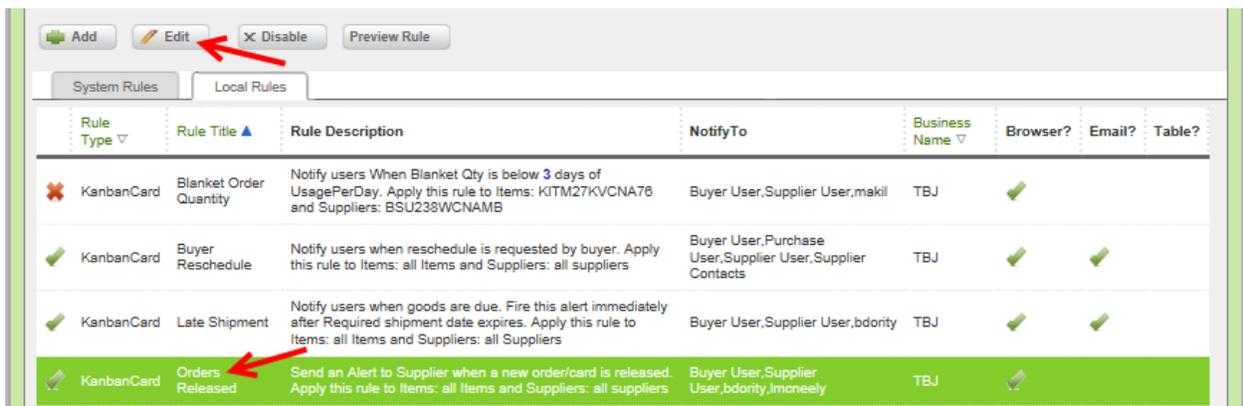
To navigate to “Edit a Rule”, click on “Admin”



Click on “Rules”



Click on the rule to edit and the line will highlight. Click on the “Edit” button.





Important – When “Editing” a “Rule” you must click on the “Finish” button on the “Repeat Information” screen for the changes to take effect.

The “Rule” can now be “Edited”. When the **editing** is **completed** on this page, **click** on the “Next” button

Rule Wizard: Select Rule Template Last modified on [01/29/2014] by [Laura Maki] How do I?

Select Rule Template Message Information Repeat Information

Rule Information

* What is the Title of the Rule?
Orders Released

* Notify the Users
Card/Order Released to Supplier

* Rule Description
Send an Alert to Supplier when a new order/card is released. Apply this rule to Items: [all Items](#) and Suppliers: [all suppliers](#)

* Required field

Next > X | Cancel

When the **editing** is **completed** on this page, **click** on the “**Next**” button

Rule Wizard: Message Information Last modified on [01/29/2014] by [Laura Maki] How do I?

Select Rule Template Message Information Repeat Information

Message Information

Send message via: Table Browser Email Preview Rule

Message Recipient: Buyer User Supplier User Quality User Purchase User Supplier Contact

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Message Subject: Card [KC:BPFL_GID] is Released for Item: [ITM:ItemNo]Released[KC:ReleaseDate]

Message Body:

A Card/Order [KC:BPFL_GID] is released for ItemNo: [ITM:ITEMNO]. Required ShipDate: [KC:ReqShipDate]. Card Quantity: [KC:CardQty].

Append Notes

* Required field << | Prev Next | >> X | Cancel

When the **editing** is **completed** on this page, **click** on the “**Finish**” button for the changes to take effect.

Rule Wizard: Repeat Information Last modified on [01/29/2014] by [Laura Maki] How do I?

Select Rule Template Message Information Repeat Information

Repeat Information

Repeat: 0 Times (0 = no repeat)

Every: 0 Days

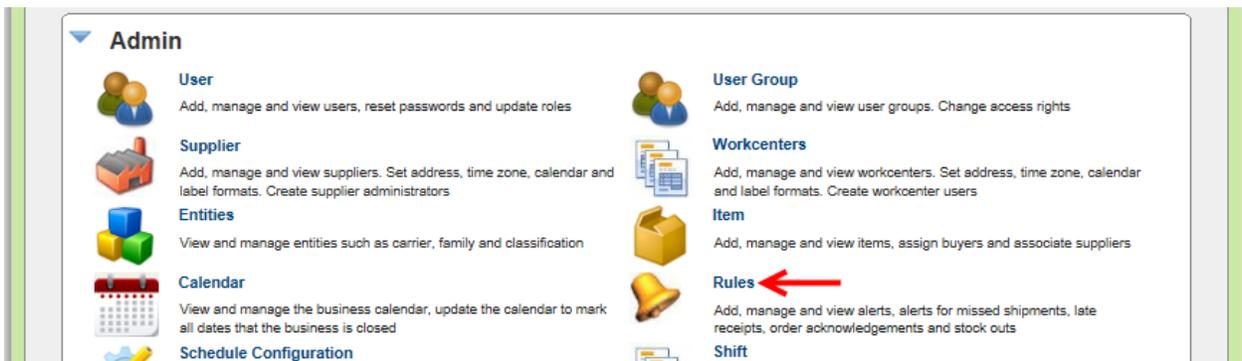
* Required field << | Prev Finish | >> X | Cancel

Disable/Delete a Rule

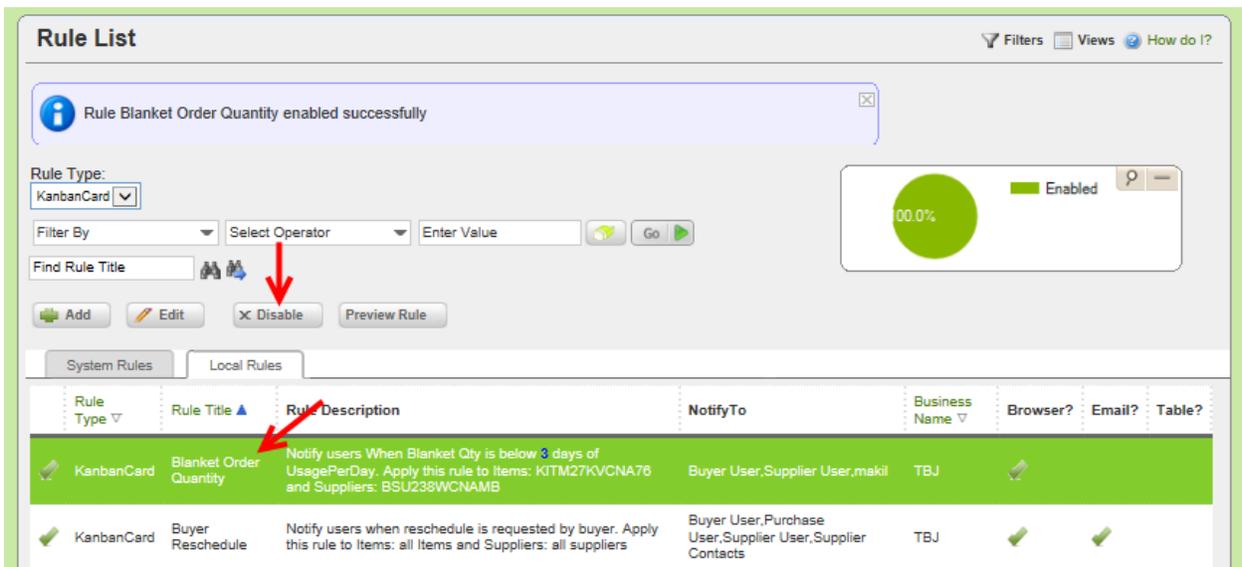
To navigate to “Disable a Rule”, click on “Admin”



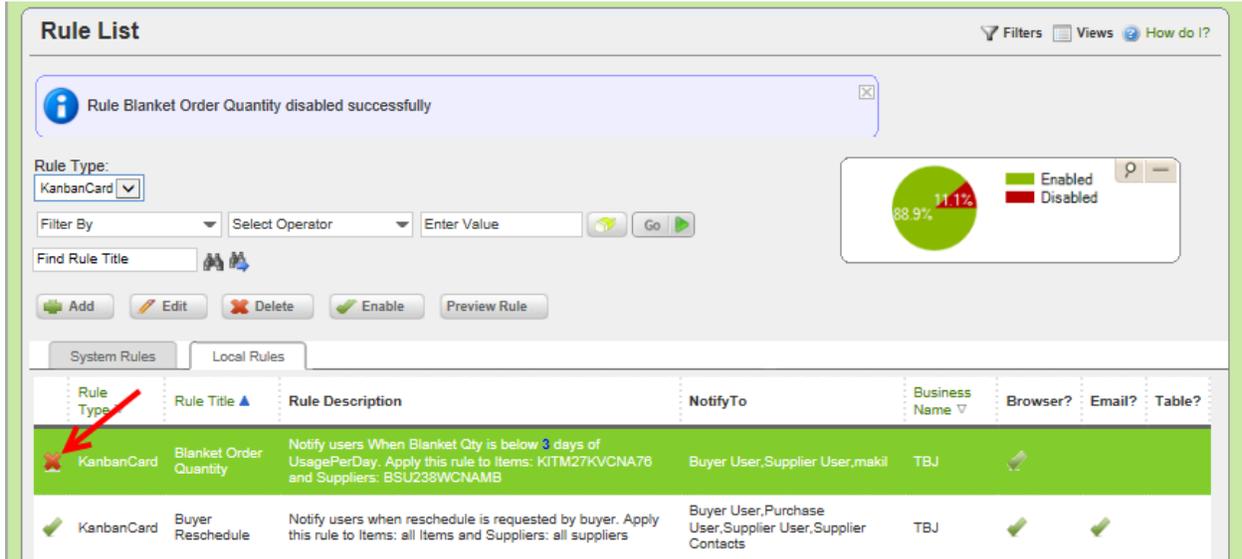
Click on “Rules”



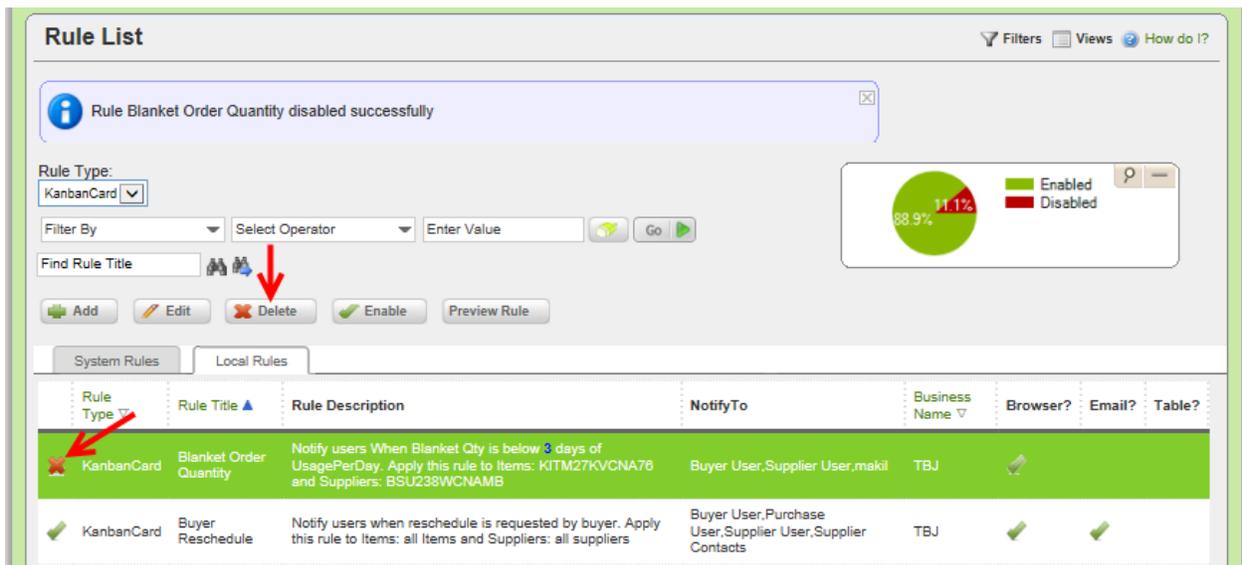
Click on the rule to **disable** and the **line will highlight**. Click on the “Disable” button.



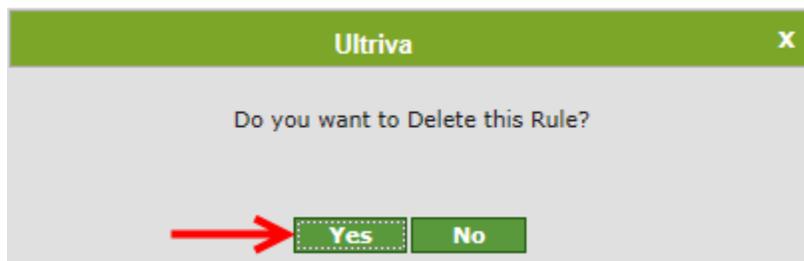
A “**RED X**” appears. The “**Rule**” is “**Disabled**”



The “**Rule**” can now be “**Deleted**”. With the “**Disabled**” rule highlighted, click on the “**Delete**” button.



Click on the “**Yes**” button.



The “Rule” has been “Deleted” and removed from the list.

The screenshot displays the 'Rule List' interface. At the top, a success message reads 'Rule Blanket Order Quantity Deleted successfully' with a red arrow pointing to it. Below this, there are controls for 'Rule Type' (set to 'KanbanCard'), 'Filter By', 'Select Operator', and 'Enter Value'. A progress indicator shows '00.0%' and 'Enabled'. Action buttons include 'Add', 'Edit', 'Disable', and 'Preview Rule'. The main area shows a table with two rules under the 'Local Rules' tab. A red arrow points to the 'Rule Description' column header.

| Rule Type | Rule Title | Rule Description | Notify To | Business Name | Browser? | Email? | Table? |
|------------|------------------|---|--|---------------|----------|--------|--------|
| KanbanCard | Buyer Reschedule | Notify users when reschedule is requested by buyer. Apply this rule to Items: all Items and Suppliers: all suppliers | Buyer User,Purchase User,Supplier User,Supplier Contacts | TBJ | | | |
| KanbanCard | Late Shipment | Notify users when goods are due. Fire this alert immediately after Required shipment date expires. Apply this rule to Items: all Items and Suppliers: all Suppliers | Buyer User,Supplier User,bdorty | TBJ | | | |