# upland Ultriva

## Ultriva 8.0 and Above Ship Using Certification Control

### **Reference Guide**

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#### **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.

*Important – The certification must be attached when shipping the cards. If the document was attached at a different time, it must be attached again on the Ship Cards List screen.* 

To navigate to the "Ship" screen, click on "Actions"



#### Click on "Ship"



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."

	Ship Items List 🔻				T Filters	· ▼ ● Views ▼	🖶 Print 📝 Export ( 🔗
	Plant Plant One X	Cards Show All V Items List	Category All	Product Line Commodity Code	e RYG		
	Filter By 💌 Select Operator	<ul> <li>Enter Value</li> </ul>	<b>▼</b> ★ 1 Go →	-			
F	nd Supplier Item No. 🙀 🛝 📥	-					E Show Cards

Click on the line for the item to ship and the line will highlight. Click on the "Show Cards" button.

5	Shi	ip Items List 👅			▼ Filters ▼		🔒 Print	C Export	*
P	Plant Plan	ret One X	Show Category Product Line Items List V All All V Te Go V	Commodity Code RYG					ī
15-1	6164	16/021-0165-00 🏘 🔥							Show Cards
Sor	rted	by: Supplier Item No							1 to 7 of 7
RYG	î î	Supplier Item No 1	Description 1	Plant Item No 📋	Total Cards 1	Total Qt	y T Plant		
		15-61636/021-0166-00	dog leash	ULT-021-0166-00	6		30 Plant	One	
		15-61646/021-0165-00	Dog collar for large dogs	ULT-021-0165-00	2		6 Plant	One	
		458962	Test	458962	9		45 Plant	One	
		UM-555	Lori Test Item 555	LJM-555	1		25 Plant	One	

Quick Tip – Ultriva will not allow a supplier to ship without the certification information if it is required from the supplier.

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

Ship (	Card	ls List	T										🔒 Print 🛛 🖓 Exp	port 🕜
Find Card ID			約 約								🗈 Ship 🗔 /	Attach Notes	+ Back To Items	≓ Change Filter
Tracking No.			Carrier ETD	Manufacture date 09/28/2020	Expiration date 09/28/2020	Packin 11223	g Slip No 3							
Sorted by:	Supplie	er Item N	No., Researchip, Card ID											1 to 2 of 2
			Card ID 1	Supplier Item No. 1	Release Date	Reqd Ship 1	Reqd Receive	Manufacture Date	Expiration Date	Card ( Qty	Ship Qty	Packing Slip No	î PO# î	PO Line #
	ø	<b>Z</b>	KCD3GCACNAWT	13-61617/021-0164-00	09/28/2020	10/09/2020	10/13/2020			3402	3402	112233	203346	0
	9	2	KCD3PTUCNAR2	13-61617/021-0164-00	09/28/2020	10/09/2020	10/13/2020			3402	3402	112233	203346	0
											🕒 Ship 🔲 🗸	Attach Notes	← Back To Items	≓ Change Filter

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 (	Card	ds Lis	t <b>T</b>												🔒 Print 🛛 🖓 Exp	port 🕜
Find Card ID Tracking No.			A A Carrier ETD	Manufacture date 09/28/2020 อา	Expiration date 09/28/2020	Packing 11223	g Slip No 3 il						🗈 Ship 🗆 A	Attach Notes	Back To Items	≓ Change Filter
Sorted by:	Suppl	ier Item	No., Reqd Ship, Card ID													1 to 2 of 2
			Card ID 1	Supplier Item No. †	Release Date	Reqd Ship 1	Reqd Receive	Manufactur	e Date	Expiration D	ate	Card 1 Qty	Ship Qty	Packing Slip No	PO# 1	PO Line #
	9	2	KCD3GCACNAWT	13-61617/021-0164-00	09/28/2020	10/09/2020	10/13/2020					3402	3402	112233	203346	0
	8	2	KCD3PTUCNAR2	13-61617/021-0164-00	09/28/2020	10/09/2020	10/13/2020					3402	3402	112233	203346	0
													🖸 Ship 🔲 🗸	Attach Notes	+ Back To Items	≓ Change Filter

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



*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.* 

Ship C	ard	s Lis	t <b>T</b>												🔒 Print 🛛 🖸 Exp	ort 🕜
Find Card ID Tracking No.			Carrier ETD	Manufacture date 09/28/2020 อา	Expiration date 09/28/2020	Packin 회 11223	g Slip t					G	9 Ship 🛛 A	ttach Notes	← Back To Items	≓ Change Filter
Sorted by: S	upplie	r Item I	No., Reqd Ship, Card ID											+		1 to 2 of 2
			Card ID 1	Supplier Item No. 1	Release Date	Reqd Ship 1	Reqd Receive	Manufacture D	Date	Expiration Dat	te Car Qi	d î	Ship Qty	Packing Slip No	PO # 1	PO Line # 🗍
	9	<b>~</b>	KCD3GCACNAWT	13-61617/021-0164-00	09/28/2020	10/09/2020	10/13/2020				3	402	3402	112233	203346	0
	ø	~	KCD3PTUCNAR2	13-61617/021-0164-00	09/28/2020	10/09/2020	10/13/2020				3	402	3402	112233	203346	0
												C	3 Ship 🛛 A	ttach Notes	+ Back To Items	≓ Change Filter

Click on the "Attach Notes" button

Ship Card	ds Lis	st T													● Views ▼		🕑 Expo	ort 🕜
Find Card ID Tracking No.		A A Carrier		Manufacture date		Expiration date		Packin	g Slip No					🛛 Ship 🗖	Attach Notes	+ Back To	Items	≓ Change Filter
		ETD	~	09/28/2020	ē1	09/28/2020	Ð	11223	3	đ								
Sorted by: Suppli	ier Item	No., Regd Ship, Card ID	0															1 to 2 of 2
		Card ID 1	Su	pplier Item No. T		Release Date	Reqd Shi	pt	Reqd Receive		Manufacture Date	Expiration Date	Card Qty	Ship Qtj	Packing Slip No	t a	PO#	PO Line #

#### In the Attach Notes field, click on "Attach/Remove"

Priority:
Notes: Select Notes  Attach files:
Select Notes  Attach files:
Attach files:
Attach files:
Attach/Remove
Apply this notes and priority to all selected Cards
G Apply Notes 🖒 Ship Ø Cancel

Enter a "Description" for the document in the "Title" section

Attach file(s) for Card: KCD3GCACNAWT	
To attach a file, type the path of the file in the field below of the on button to locate it in your computer.	the <b>Browse</b>
*Title: Certification for part 13-61617	
*Attachment: Choose File No file chosen	1
Click on the <b>Upload File</b> Title button. Wait till your file appears in the Repeat the process to attach another file.	box below.
Upload File     Attachments	
Title	Action
Click on the Done button after uploading the file(s)	
S Done Ø Cancel	

Click on the "Chose File" button and select the file

To attach a file, type the path of the file in the field below o	r click on the Browse
button to locate it in your computer.	
*Title: Certification for part 3-61617	
*Attachment: Choose File No file chosen	8
Click on the <b>Upload File</b> Title button. Wait till your file appe Repeat the process to attach another file.	ars in the box below.
ᆂ Upload File	
Attachments	
Title	Action
Click on the <b>Done</b> button after uploading the file(s)	

Select the document and click on the "Upload File" button

To attach a fi button to loc	le, type the path of the file in the field below or click or ate it in your computer.	n the Browse
*Title:	Certification for part 13-61617	
*Attachment	Choose File TermsConditions - Container.txt	1
Click on the I Repeat the p	<b>Jpload File</b> Title button. Wait till your file appears in th rocess to attach another file.	e box below.
Attachments	1 Upload File	
Title		Action



Attachments	
Title	Action
Certification for part 13-61617	Remove

*The file appears*. **Click** on the "**Done**" button **after uploading** the file(s)

Attach file(s) for Card: KCD3GCACNAWT									
To attach a file, type the path of the file in the field below or click on the <b>Browse</b> button to locate it in your computer.									
*Title:									
*Attachment: Choose File TermsConditions - Container.txt	8								
Click on the <b>Upload File</b> Title button. Wait till your file appears in the box below. Repeat the process to attach another file.									
1. Upload File									
Attachments									
Title	Action								
Certification for part 13-61617	Remove								
Click on the Down button after uploading the file(s)									
Image: State of the state of booking the methy       Image: State of the state of booking the methy       Image: State of the state of booking the methy       Image: State of the sta									

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 notes for Card:KCD3GCACNAWT	
Priority:	
Notes:	
Select Notes 🗸	
Attach files:	
Certification for part 13-6161	
Apply this notes and priority to all select functions and select functio	

The certificate attachment appears on the cards shipped. Click on the "Print Cards" button

	2 Cardis) have been shipped without printing. Please immediately print the Cardis) by clicking Print Cards button							
					NO. Of Coples:  Use Plant To Supplier Setting  Use Plant Setting  Use Input Value	🕀 Print Cards		
	•		Card ID	Supplier Item No.	Description	Printed		
1	<b>S</b>	<b>~</b>	KCD3GCACNAWT	13-61617/021-0164-00	Card successfully shipped and not printed.	No		
	1	<b>2</b>	KCD3PTUCNAR2	13-61617/021-0164-00	Card successfully shipped and not printed.	No		

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

#### **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.

and the	A4 A4					11				🗈 Ship 🛛 Atta	ich Notes 🗲 Back Tr	o Items 🗧 🛱	± Change Filt
ing No.	Carrier	Manufacture d	ate Expira	ition date	Packing Slip f	No Suppl	ier Lot/Serial #						
-	ETD	✔ 09/28/2020	<b>1</b> 09/28	/2020		5 <sup>1</sup>	đ						
ed by: Supplier Ite	em do., Reqd Ship, Ca	rd ID											1 to 2 (
	Card ID 1	Supplier Item No. 1	Release Date	Regd Ship 1	Regd Receive	Manufacture Date	Expiration Date	Card	Ship Qty	Supplier Lot/Serial #	Packing Slip No	PO # 1	PO Line
								QUY					
					10/06/2020			3	3	1233			
	KCDPYXECNAYG	15-61646/021-0165-00	09/25/2020	10/02/2020	10/00/2020					1422		346472	
<b>@</b>	KCDPYXECNAYG	15-61646/021-0165-00	09/25/2020	10/02/2020	10/00/2020				Serial No.	1235		346472	
90	KCDPYXECNAYG	15-61646/021-0165-00	09/25/2020	10/02/2020	10/00/2020			-	Serial No.	1235 1234 1244		346472	

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

Ship Ca	rds	s Li	st 🔻									۲	Views 👻 🖨 Print	C Export	0
Find Card ID			A4 44									Ship Attach	Notes 🗲 Back To I	tems =	<sup>±</sup> Change Filter
Tracking No.			Carrier ETD	Manufacture da     09/28/2020	Expirat	ion date 2020	Packing Slip No 123344	Supplier	Lot/Serial #				,		
Sorted by: Su	pplier	r Iten	n No., Reqd Ship, Card	d ID									- <b>4</b>		1 to 2 of 2
			Card ID 1	Supplier Item No. 1	Release Date	Reqd Ship 1	Reqd Receive	Manufacture Date	Expiration Date	Card T	Ship Qty	Supplier Lot/Serial #	Packing Slip No	PO # 1	PO Line # 🗍
8	3	<b>~</b>	KCDPYXECNAYG	15-61646/021-0165-00	09/25/2020	10/02/2020	10/06/2020			3	3 Serial No.	1233 1235 1234	123344	346472	0
8	9	2	KCDPYXFCNA32	15-61646/021-0165-00	09/25/2020	10/02/2020	10/06/2020			3	3 Serial No.	1244 1245 1246	123344	346472	0
												Ship Attach	Notes 🗲 Back To I	items	t Change Filter

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

