



**Ultriva 8.0 and Above
Supplier Inventory Upload
Reference Guide**

Table of Contents

(Click to follow link)

<i>Get a Sample File and General Spreadsheet Set-up.....</i>	<i>2</i>
<i>Inventory Upload Instructions</i>	<i>8</i>
<i>Inventory Upload Filtering Instructions.....</i>	<i>12</i>
<i>Supplier Queue – View your On Hand Inventory</i>	<i>14</i>

Get a Sample File and General Spreadsheet Set-up



Important – The “User” must be a Supplier Administrator to perform these functions!



Quick Tip - You must have your Excel Spreadsheet Set-up and Saved as a Tab Delimited file prior to the upload. These instructions will guide you through getting the sample file and saving it in the proper format.

To navigate to the **Inventory Upload** screen, **click** on “**Admin**”

The screenshot shows the Ultriva Home dashboard. The top navigation bar includes the Ultriva logo, 'Ultriva Demo', search, heart, and help icons, and the user 'ultriva user'. The main content area is divided into several sections: 'Inventory Health (Items - Stock Out Risk)' with three cards for High (2 Items), Medium (2 Items), and Low (2 Items); 'Alerts' showing 'You have no new alerts'; 'Order Tracking' with four cards: 'Orders Not yet Acknowledged' (19), 'Orders past due for Shipping' (0), 'Expected by customer today (includes past due)' (0), and 'Orders to be shipped in next 7 days' (10); and 'MRP Forecasts Gross Requirements' with three cards: 'Past + 7 Days' (0), 'Next 7 Days' (0), and 'Future' (0). The left sidebar contains navigation icons, and the 'Admin' button at the bottom is highlighted with a red arrow.

Click on “**Business Unit**”

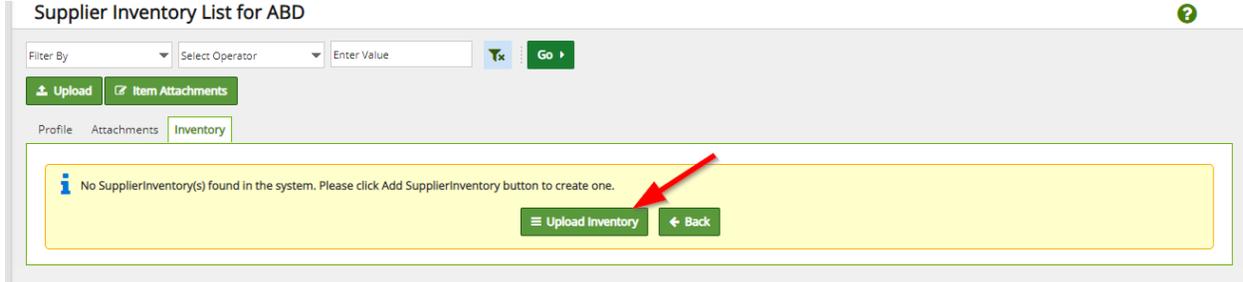
The screenshot shows the 'Admin' menu. The 'Admin' dropdown is expanded, showing several options: 'User' (Add, manage and view users, reset passwords and update roles), 'Calendar' (View and manage the business calendar, update the calendar to mark all dates that the business is closed), 'Business Unit' (View and update business unit details such as name, location and address), 'Manage Tolerance Percentage' (Set/Update tolerance percentage for items in this business unit), 'Entities' (View and manage entities such as carrier, family and classification), and 'Supplier Item' (Add, manage and view supplier items). The 'Business Unit' option is highlighted with a red arrow.

Click on the “**Inventory Tab**”

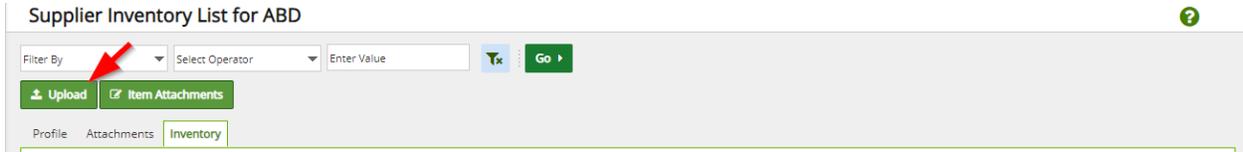
The screenshot shows the 'View Supplier AAA Inc' page. The 'Profile' tab is selected, and the 'Inventory' sub-tab is highlighted with a red arrow. Below the tabs, the 'Supplier Information' section is visible.

Click on the “Upload Inventory” button (Screenshot #1) if this is your first upload. Click on the “Upload” Button (Screenshot #2) if you have uploaded data before. (If you have uploaded data prior to this, you will not see screenshot #1).

Screenshot #1

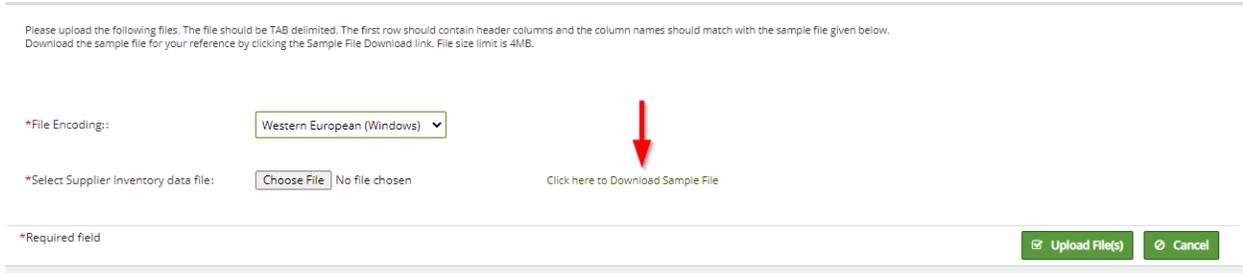


Screenshot #2

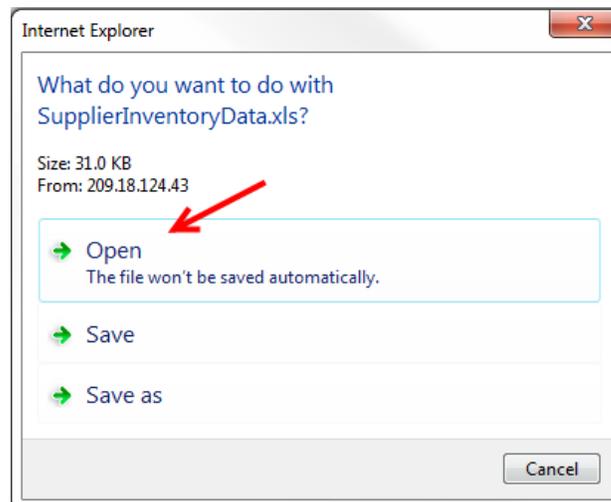


Click on the “Click here to Download Sample file” link.

Load Supplier Inventory Data



Click on “Open”



The sample spreadsheet opens. Leave the “Column Headings” and Delete the other information.

A	B	C	D
SupplierItemCode	SupplierItemDesc	OnHandQty	ListPricePerUOM
0017-00006-0274	0017-00006-0274	5	10.34
0017-00006-0276	0017-00006-0276	200	100
0017-00006-0283	0017-00006-0283	300	22.25
0017-00006-0285	0017-00006-0285	400	22.56



Important – You must use the Supplier Item Number that is in Ultriva and the column headings must match exactly as defined in the sample file that you downloaded.

Enter the information to upload.



Quick Tip - The ListPricePerUOM can be entered as a Zero as that value will not be changed.

SupplierItemCode	SupplierItemDesc	OnHandQty	ListPricePerUOM
24699	SHAFT	250	10.1
24689	MACHINE PART	1200	3.144
24688	BEARING	200	11.11

Click on the “Windows Office” button. (Or if you do not have that option, select “File” from the menu.)

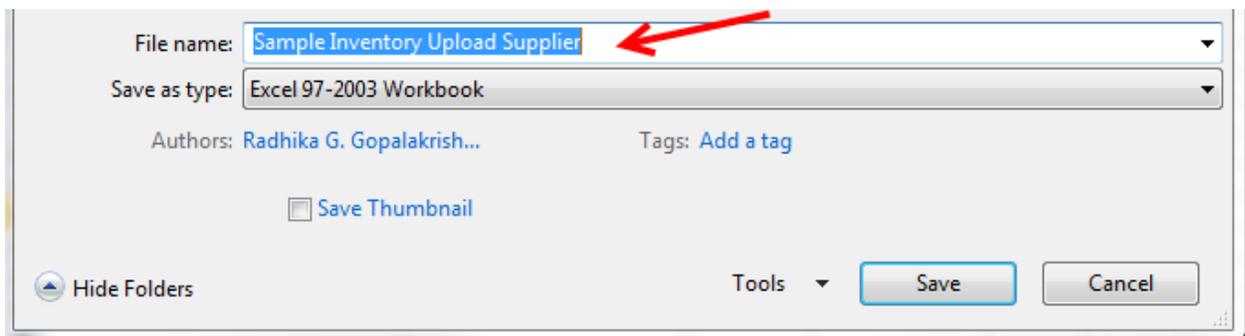
The screenshot shows the Microsoft Excel interface. The ribbon is set to 'Home', and the 'Clipboard' group is active. Below the ribbon, the spreadsheet data is visible, matching the table in the previous block. The active cell is A12.

	A	B	C	D
1	SupplierItemCode	SupplierItemDesc	OnHandQty	ListPricePerUOM
2	24699	SHAFT	250	10.1
3	24689	MACHINE PART	1200	3.144
4	24688	BEARING	200	11.11

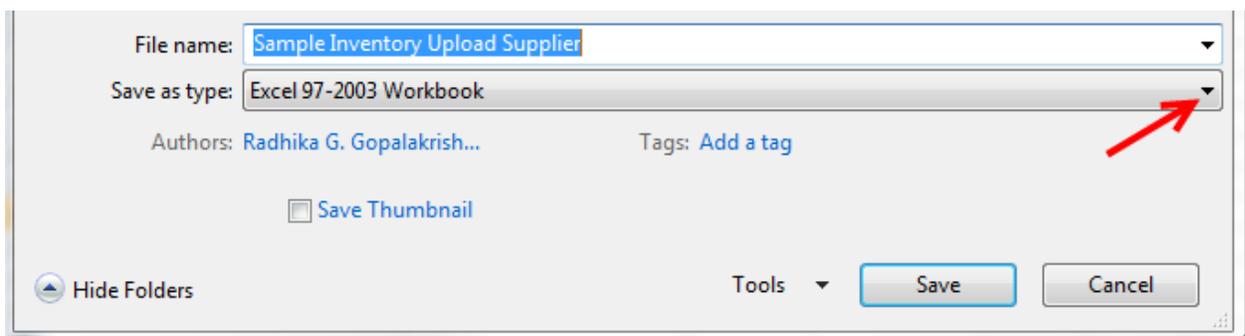
Click on “Save As”



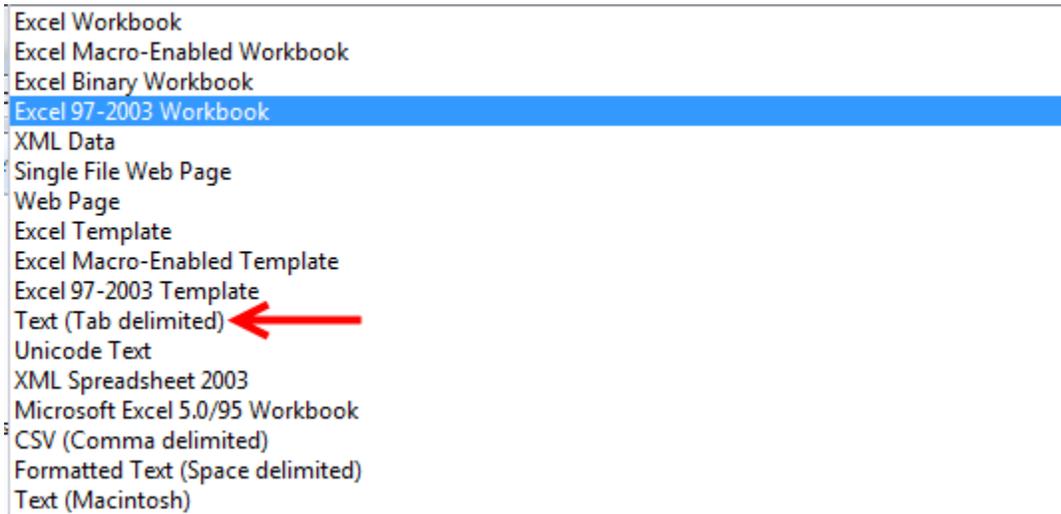
Enter the “File Name”



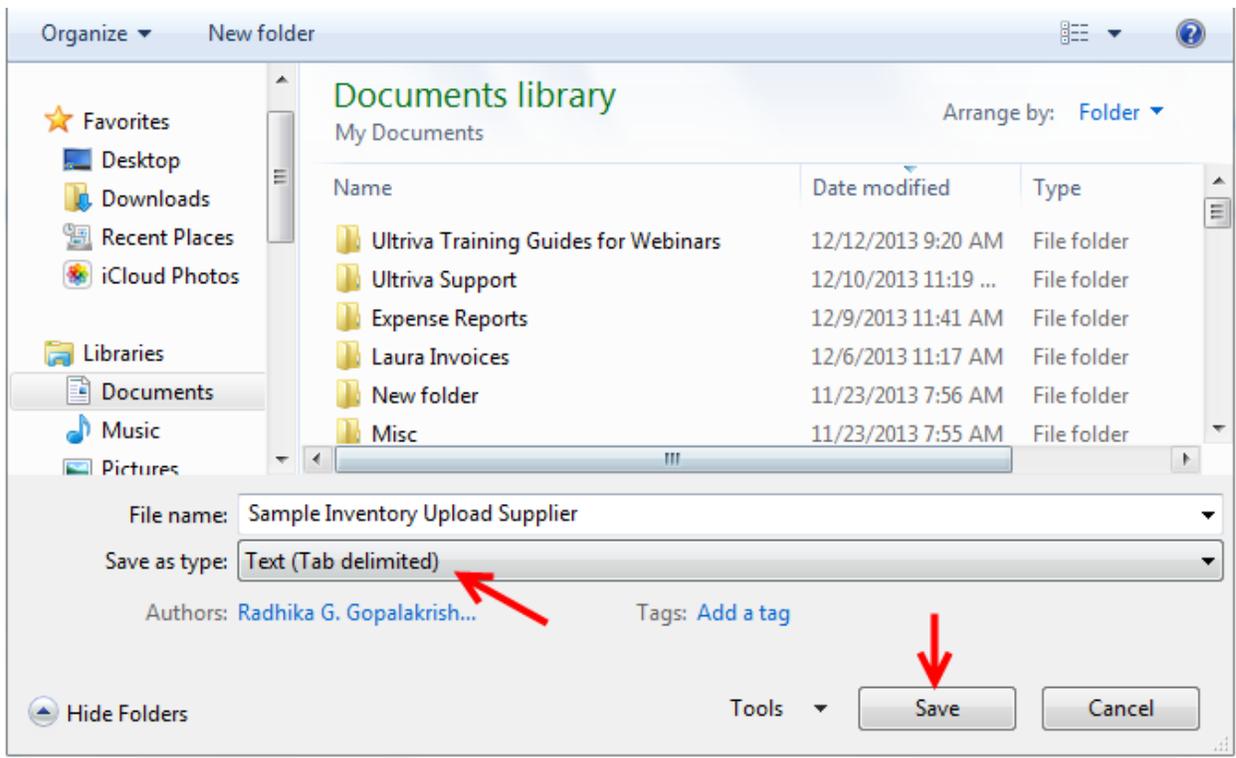
Click on the **drop down arrow** in the “Save as type:” field.



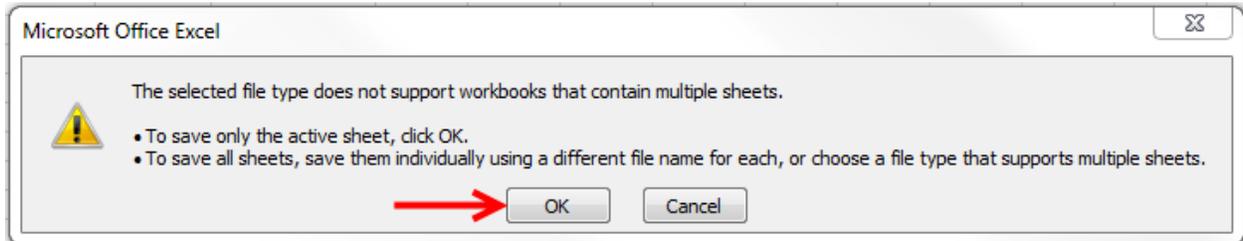
Click on “Text (Tab Delimited)”



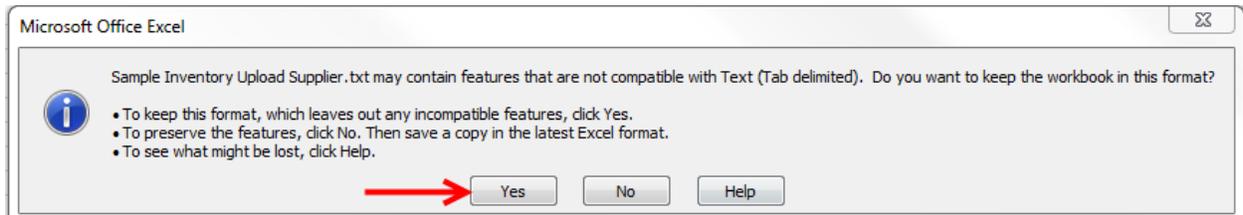
With the “Text (Tab Delimited)” selected, click on the “Save” button



Click on the “OK” button.



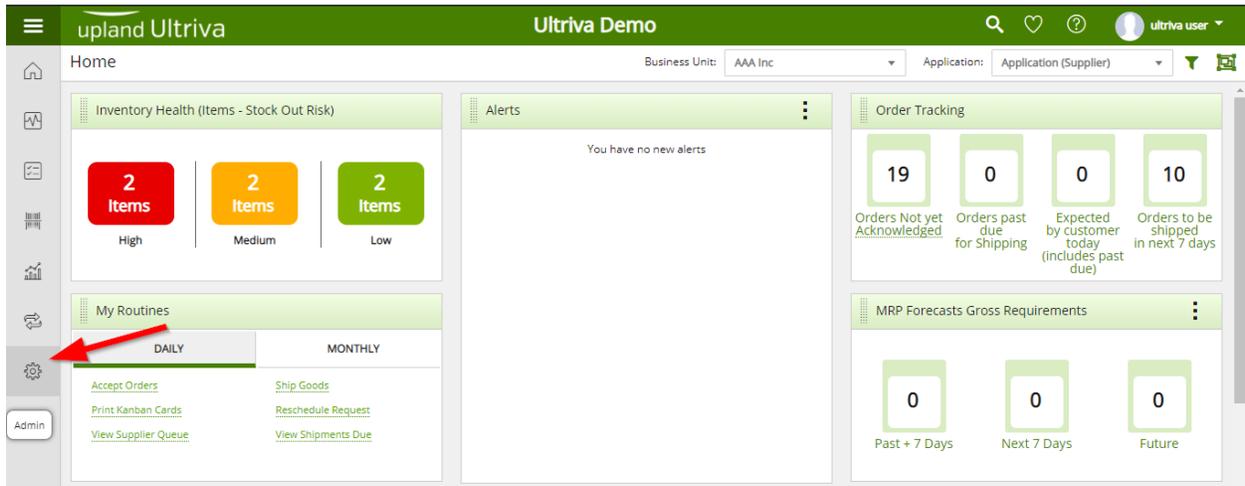
Click on the “Yes” button.



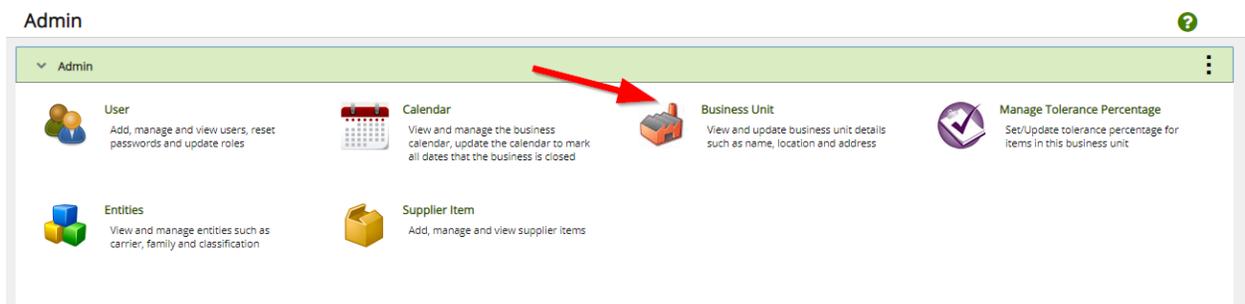
Your spreadsheet is now ready for the upload.

Inventory Upload Instructions

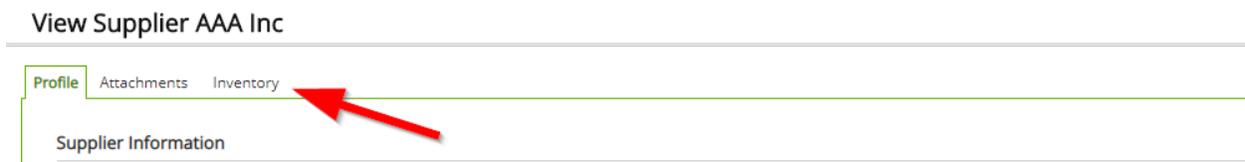
To navigate to the **Inventory Upload** screen, **click** on “**Admin**”



Click on “**Business Unit**”



Click on the “**Inventory Tab**”



Click on the “**Upload Inventory**” button (**Screenshot #1**) if this is your **first upload**. Click on the “**Upload**” button, (**Screenshot #2**), if you have **uploaded the data before**.

(If you have uploaded data prior to this, you will not see screenshot #1).

Screenshot #1

Supplier Inventory List for ABD ?

Filter By Select Operator Enter Value

Profile Attachments **Inventory**

i No SupplierInventory(s) found in the system. Please click Add SupplierInventory button to create one.

Screenshot #2

Supplier Inventory List for ABD ?

Filter By Select Operator Enter Value

Profile Attachments **Inventory**

Click on the “Choose File” button

Load Supplier Inventory Data ?

Please upload the following files. The file should be TAB delimited. The first row should contain header columns and the column names should match with the sample file given below. Download the sample file for your reference by clicking the Sample File Download link. File size limit is 4MB.

*File Encoding:

*Select Supplier Inventory data file: No file chosen [Click here to Download Sample File](#)

*Required field

Select the File and click on the “Upload Files” button

Load Supplier Inventory Data ?

Please upload the following files. The file should be TAB delimited. The first row should contain header columns and the column names should match with the sample file given below. Download the sample file for your reference by clicking the Sample File Download link. File size limit is 4MB.

*File Encoding:

*Select Supplier Inventory data file: SupplierInventoryData (2).xls [Click here to Download Sample File](#)

*Required field



Important – The file must be a Tab Delimited Text file. Click on the link below for detailed instructions on setting up your spreadsheet and saving as a tab delimited.

Sample File and General Spreadsheet Set-up

Here is a **Preview** of the **Source Data** in the Upload Wizard section. **Click** the “**Next**” button if this is correct.



Important – If your data is not correct, select “**Cancel**” and check the data in your spreadsheet for the error and make the necessary adjustments.

Upload Wizard: Preview Source Data ?

Preview Source Data ⌵

Import Data ○

Prepare & Save ○

Please review your input data given below. You can change the date format and decimal separator as per your data file.

File Data Format

*Date Format:

*Field Delimiter:

*Decimal Separator:

JOBERSUPPLIERINVENTORYDATA data file

Total Lines3
Error Lines0
Empty Lines0

Line #	A	B	C	D	Status
1	SupplierItemCode	SupplierItemDesc	OnHandQty	ListPricePerUOM	
2	ULT-001-0456-00	Quest Main Bearing	5	10.34	
3	ULT-001-0456-01	Quest Main Bearing	200	100	

*Required field

Review the information, click on the “**Finish**” button. *This is the data that is being imported.*

Upload Wizard: Import Data ?

Preview Source Data ⊘

Import Data ⌵

Prepare & Save ○

JOBERSUPPLIERINVENTORYDATA Data has been imported successfully.

Top 2 of 2 imported records

BJ ID	EBJ BATCHGID	EBJ LINENUM	EBJ STATUS CODE	EBJ STATUS CHGTIME	EBJ STATUS MSG	EBJ LAST UPDATE	EBJ BUSGID	EBJ BUSCODE	EBJ ITEMNO	EBJ RESERVED1	EBJ RESERVED2	EBJ RESERVED3	EBJ RTPARAMS	Supplier GID	Supplier Item Code	Supplier Item Desc	On Date	On Hand Qty	List Price Per UOM
		0		1899-12-30 00:00:00		1899-12-30 00:00:00					0.00000	1899-12-30 00:00:00		ULT-001-0456-00	Quest Main Bearing	1899-12-30 00:00:00	5.00000	10.34000	
		0		1899-12-30 00:00:00		1899-12-30 00:00:00					0.00000	1899-12-30 00:00:00		ULT-001-0456-01	Quest Main Bearing	1899-12-30 00:00:00	200.00000	100.00000	

The **data** has been **uploaded**. *The list will include part numbers from prior uploads.*

If you would like to only view items from this run, go to the next page for the “**Filtering Instructions**”.

Supplier Inventory List for ABD 

Print  Export  

Filter By Select Operator Enter Value 

Find Supplier Item No.  

Profile Attachments **Inventory**

Sorted by: Supplier Item No. 1 to 2 of 2

Supplier Item No. ↑	Description ↑	Supplier On Hand Qty ↑	Unit Description ↑	List Price Per UOM ↑	On Date ↑	Last Uploaded Date ↑	Uploaded By ↑
ULT-001-0456-00	Quest Main Bearing	5	EA	10.34	09/29/2020	09/29/2020	ultriva user
ULT-001-0456-01	Quest Main Bearing	200	EA	100.00	09/29/2020	09/29/2020	ultriva user



Inventory Upload Filtering Instructions



Quick Tip - Once the upload of the data is complete, “Filter” options are available when looking for specific information. The “Filter” options are, “Supplier Item No., Description, Supplier On-Hand Quantity and On Date”. Our example below is “On Date” (the date we ran the upload)

Click on the **drop down arrow** in the “Filter By” field.

Supplier Inventory List for ABD Print Export ?

Filter By Select Operator Enter Value

Find Supplier Item No.

Profile Attachments **Inventory**

Select “On Date”

Supplier Inventory List for ABD Print Export ?

Filter By Select Operator Enter Value

Supplier Item No.
Description
Supplier On Hand Qty
On Date

Profile Attachments **Inventory**

Click on the **drop down arrow** in the “Select Operator” field.

Supplier Inventory List for ABD Print Export ?

Filter By Select Operator Enter Value

Find Supplier Item No.

Select “Equal To”

Supplier Inventory List for ABD Print Export ?

Filter By Select Operator Enter Value

Find Supplier Item No.

Profile Attachments **Inventory**

Sorted by: Supplier Item

Supplier On Hand Qty	Unit Description	List Price Per UOM	On Date	Last Uploaded Date	Uploaded By
5	EA	10.34	09/29/2020	09/29/2020	ultriva user
200	EA	100.00	09/29/2020	09/29/2020	ultriva user

Click in the “Enter Value” field and a calendar appears. Click on the” Date” of the last upload to select it and the date will appear. Click on the “Go” button.

Supplier Inventory List for ABD Print Export ?

On Date: [v] Equal To: [v] 09/29/2020 [Tx] **Go**

Find Supplier Item No. [icon] [icon]

The data from your selected date has now been populated into the Supplier Inventory List.

Supplier Inventory List for ABD Print Export ?

On Date: [v] Equal To: [v] 09/29/2020 [Tx] **Go**

Find Supplier Item No. [icon] [icon]

Upload **Item Attachments**

Profile Attachments **Inventory**

Sorted by: Supplier Item No. 1 to 2 of 2

Supplier Item No. ↑	Description ↑	Supplier On Hand Qty ↑	Unit Description ↑	List Price Per UOM ↑	On Date ↑	Last Uploaded Date ↑	Uploaded By ↑
ULT-001-0456-00	Quest Main Bearing	5	EA	10.34	09/29/2020	09/29/2020	ultriva user
ULT-001-0456-01	Quest Main Bearing	200	EA	100.00	09/29/2020	09/29/2020	ultriva user

Supplier Queue – View your On Hand Inventory

To navigate to the “Supplier Queue”, click on “Actions”

The screenshot shows the Ultriva Demo dashboard. The top navigation bar includes 'upland Ultriva', 'Ultriva Demo', and user information. The main content area is divided into several sections: 'Inventory Health (Items - Stock Out Risk)' with three cards for High (1), Medium (0), and Low (0) risk; 'Alerts' showing no new alerts; 'Order Tracking' with four cards for 'Orders Not yet Acknowledged' (1), 'Orders past due for Shipping' (49), 'Expected by customer today' (49), and 'Orders to be shipped in next 7 days' (49); and 'MRP Forecasts Gross Requirements' with three cards for 'Past + 7 Days' (0), 'Next 7 Days' (0), and 'Future' (0). On the left sidebar, the 'Actions' menu item is highlighted with a red arrow.

Click on “Supplier Queue”

The screenshot shows the 'Actions' menu. The 'Supplier Actions' section is expanded, displaying various actions with icons and descriptions. A red arrow points to the 'Supplier Queue' action, which is described as 'Shows distribution of Card States for each Item'. Other actions include 'Accept', 'Ship', 'Consolidator Ship', 'Recall', 'Reschedule Request', 'Set Tracking/Packing Slip Numbers', 'Set WorkOrder No.', 'Master Label', 'Print PO', 'Supply Planning', 'Invoice Creation', and 'Request Quality Approval'.

The “On-Hand Quantity” can now be viewed in the “Supplier Queue”

The screenshot shows the 'Supplier Queue Items List' table. The table has a header row with columns for 'On Hand', 'Released', 'In Process', 'At Ship Hub', 'In Transit', 'Received At Dock', 'Put Away', 'Others', 'Total Cards', and 'On Hand At Supplier'. The 'On Hand At Supplier' column is highlighted with a red arrow. The table contains one data row for item 'ULT-001-0456-01' with a quantity of 2 in the 'On Hand At Supplier' column.

RYG	Supplier Item No.	Description	Plant Item No.	Min Order Cards	On Hand		Released		In Process		At Ship Hub		In Transit		Received At Dock		Put Away		Others		Total Cards	On Hand At Supplier		
					Cards	Qty	Cards	Qty	Cards	Qty	Cards	Qty	Cards	Qty	Cards	Qty	Cards	Qty	Cards	Qty		Cards	Qty	
	ULT-001-0456-01	Quest Main Bearing	ULT-001-0456-01	0	0	0	1	160	49	7,840	0	0	0	0	0	0	0	0	0	0	0	50	2	200