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Footprint WMS

Customer Portal User Manual

Table of Contents

Table of Contents	2
Footprint Customer Portal	4
Orders Guide	5
Create and submit a Receiving order	23
Create and submit a shipping order	29
Import Orders	36
Discussions	41
Create a Dock Appointment	44
Add Attachments	46
Exporting grid data	48
Portal Project guide	50
Create and manage shipping contacts	58
Portal Reports hub guide	63
Subscribe to a report	73
Preview and export a report	81
Create auto-email rules	83
Manage auto-email rules	89
View and resend auto-emails	97
Portal inventory hub guide	102
Edit lot information	115
Change lot status	117
Edit serial information	122
Portal Materials hub guide	126
Create a Material	141
Edit a material	148

Invoices guide 154

Portal Transaction hub guide 158

Footprint Customer Portal

The Footprint Customer Portal provides advanced access to information about your inventory, as well as an interface for submitting orders. The Footprint Customer Portal is accessible from anywhere with internet access.

Orders Guide

Sections

- [Overview](#)
- [Orders hub](#)
- [Shipping Order](#)
- [Receiving Order](#)

Overview

From the **Orders hub**, users can create and manage orders and contacts. Shipping Orders specify which materials are being sent out, where they're being sent, and how they're getting to their destination. Receiving Orders bring materials into the warehouse through shipments.

The **Orders hub** on the Footprint Portal predominantly focuses on the creation, submission, and monitoring of orders.

Orders Hub

The **Orders hub** allows you to create and perform limited management of your Shipping and Receiving orders. All active orders you have access to are listed, defaulting to the most recent orders at the top.

Icons along the top of the **Order hub** allows users to create new Shipping and Receiving orders. For more details, please jump to our [Create an Outbound Order](#) section below. Users can also [Manage Contacts](#) and [Import orders](#) from the **Orders hub**.

Search and filter options are available to quickly locate orders for review and management. Users can filter by Owner, Project, Material, Warehouse, Status, Reference, and Create Date ranges.

Orders hub tabs

The order tabs are divided between **Shipping orders** and **Receiving orders**. Each tab on the Order Hub displays its own set of information and options for managing related data. Expand the sections below for more details about each tab.

Shipping orders

The **Shipping orders** tab lists all outbound orders, with the most recent at the top. The view can be switched between **Shipping orders** and **Tracking numbers**.

Shipping orders Receiving orders													
Viewing: Shipping orders 4 items													
Update Refresh Cancel Delete Export Filter													
☐	Order	Vendor reference	Owner reference	Status	State	Order class	Project	Total items	Created	Requested delivery	Shipped date	Warehouse	Carrier
	8241	VREF-082725	OREF0082725	Created	Created	SO	SPatric	5	8/27/2025, 2:36 PM	8/27/2025, 12:00 AM		Sara-Demo Warehouse	Bay Carriers NextDay
	8238	VREF-082525	REF00250825	Created	Created	SO	SPatric	25	8/25/2025, 2:06 PM	8/29/2025, 12:00 PM		Sara-Demo Warehouse	FedEx FedEx Ground
	8017			Processing	Ready to cancel	SO	SPatric	0 of 115	5/29/2025, 2:09 PM			Sara-Demo Warehouse	
	7752	REF000001	PO0403250001	Processing	Ready to cancel	SO	SPatric	0 of 15	4/3/2025, 10:27 AM			Sara-Demo Warehouse	

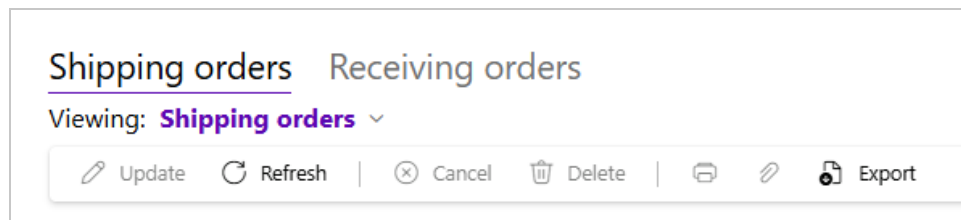
Shipping order information

Order:	The lookup number for the order.
Vendor reference:	The reference number given to the vendor for the vendor's reference.
Owner reference:	The reference number given to the order for the owner's reference.
Status:	The current status of the order.
State:	The current state of the order.
Order class:	The order class the order has been assigned to.
Project:	The name of the project associated with the order.
Total items:	The number of items picked out of the total items expected.
Created:	The date and time the order was created.
Requested delivery:	The date the delivery was requested by, if specified in the order's creation.

Shipped date:	The date the order was shipped.
Warehouse:	The warehouse where the order was created.
Carrier:	The carrier for the order.
Tracking:	The tracking ID for the order.
Ship to:	The ship to contact for the order.
Notes:	Any notes for the order.

Shipping orders tab toolbar

The **Orders** tab toolbar provides options to manage selected Shipping orders, such as **Cancel**, **Delete**, **Add Attachments**, and more.



Update:	The Update button opens a window to input the Expected date , Tracking number , Carrier , and Carrier service of the selected order.
Refresh:	The Refresh option refreshes the grid of orders.
Cancel:	The Cancel option stops selected order once it's been started.
Delete:	The Delete icon removes selected order from the system entirely.
Print:	The Print icon opens a drop-down list of all files available for the selected order that can be opened and printed. If only one relevant printable exists, it will open automatically when clicking the icon.
Attachments:	The Attachments paperclip icon opens the Attachments window for the selected Order.
Export List:	The Export option exports the details of the Order in an Excel file (where available).

Receiving orders

The **Receiving orders** tab lists all inbound orders, with the most recent at the top.

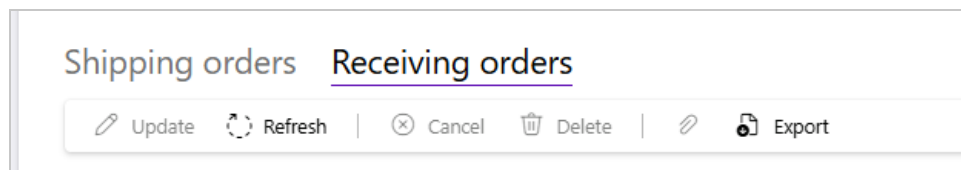
Order	Vendor reference	Owner reference	Status	Order class	Project	Total items	Created	Expected	Warehouse	Carrier	Ship from
8255			Created	PO	SPatric	50	8/28/2025, 3:28 PM		Sara-Demo Warehouse		
8252			Created	PO	SPatric	360	8/28/2025, 3:08 PM		Sara-Demo Warehouse		
8250			Created	PO	SPatric	360	8/28/2025, 3:07 PM		Sara-Demo Warehouse		
8239	VCREP-082625	CREF-082625	Wait	PO	SPatric		8/26/2025, 5:12 PM	8/30/2025, 12:00 AM	Sara-Demo Warehouse	FedEx	

Receiving order information

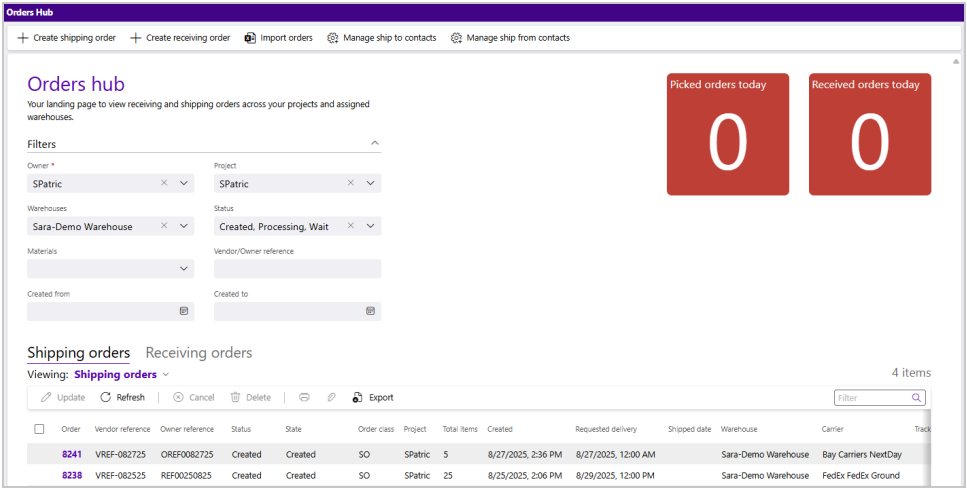
Order:	The lookup number for the order.
Vendor reference:	The reference number given to the vendor for the vendor's reference.
Owner reference:	The reference number given to the order for the owner's reference.
Status:	The current status of the order.
Order class:	The order class the order has been assigned to.
Project:	The name of the project associated with the order.
Total items:	The number of items picked out of the total items expected.
Created:	The date and time the order was created.
Expected:	The date the delivery is expected by, if specified in the order's creation.
Warehouse:	The warehouse where the order was created.
Carrier:	The carrier for the order.
Ship from:	The ship to contact for the order.
Notes:	Any notes for the order.

Receiving orders tab toolbar

The **Orders** tab toolbar provides options to manage selected Shipping orders, such as **Cancel**, **Delete**, **Add Attachments**, and more.



Update:	The Update button opens a window to input the Expected date , Carrier , and Reference number of the selected order.
Refresh:	The Refresh option refreshes the grid of orders.
Cancel:	The Cancel option stops the selected order once it's been started.
Delete:	The Delete icon removes the selected order from the system entirely.
Attachments:	The Attachments paperclip icon opens the Attachments window for the selected order.
Export List:	The Export option exports the details of the Order in an Excel file (where available).



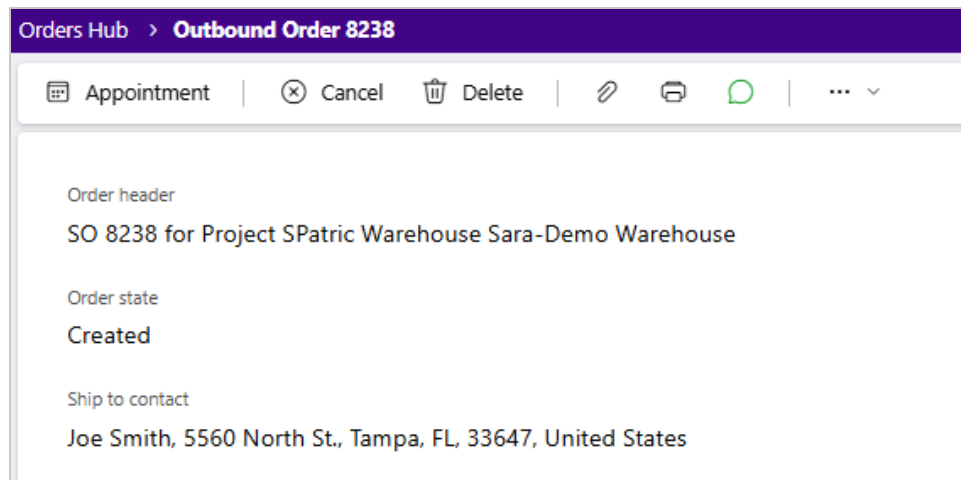
Shipping order

The Shipping order can be opened for further review and management by clicking the Order number.

The shipping order's basic information will be displayed, including the **Order number**, **Order Class**, **Project**, **Warehouse**, **Order Status**, and **Order State**. The **Details** section can be opened for more information about the Order.

Icons along the top of the shipping order provide options to manage the order. For more details, please visit the [Shipping order toolbar](#) section below.

Shipping order details



Order header: The short name of the Order class assigned to the order, the system-generated Order lookup, followed by the Project associated with the order and the warehouse to order will arrive at.

Order state: The current status of the order in the outbound handling process.

Ship from contact: This is the address associated with the order. Only visible when a Contact has been added or selected.

Details

Owner reference

REF00250825

Vendor reference

VREF-082525

Expected date

08/29/2025, 12:00 PM

Container identifier

Carrier

FedEx

Service

FedEx Ground

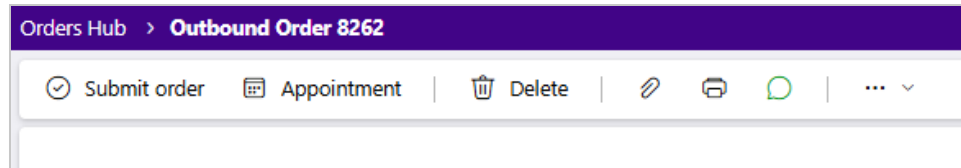
Notes

Additional notification needed after leaving warehouse.

Owner reference:	The reference number given to the Order for the Owner's reference.
Vendor reference:	The reference number given to the vendor for the Vendor's reference.
Expected date:	The date the delivery is expected by, if specified in the order's creation.
Container identifier:	The Container ID specified for the order.
Carrier:	The Carrier specified for the order. (Can only select those Carriers assigned to the Owner)
Service:	The Service specified for the order.
Notes:	Any Notes for the order.

Shipping order toolbar

The Shipping order toolbar provides functions needed to manage the shipping order. Icons in the toolbar vary depending upon the Status of the order.



Submit order: The button to **Submit an order** in **Wait** status to Footprint WMS for further processing.

Appointment: The **Appointment** button opens the Dock Appointment window for creation.

Cancel: The **Cancel** button stops the order once it's been started.

Delete: The **Delete** button deletes the Order.

Attachments: The **Attachments** paperclip button opens the Attachments window for the selected order.

Print: The **Print** icon opens a drop-down list of all files available for the order that can be opened and printed. If only one relevant printable exists, it will open automatically when clicking the icon.

Discussions: The speech bubble button will open the **Discussions** flyout to add and review comments.

Options... Dropdown: The Shipping order ... dropdown button opens to provides the ability to **review the history of auto-emailed reports** and associate a Ship to address to the order.

Shipping order tabs

The Shipping order's **Shipping lines**, **Contacts**, **Instructions**, **Picked**, and **Activity** are listed in the tabs along the bottom. Each tab on the Shipping order displays its own set of information and options for managing that information. Expand the sections below for more details about each tab.

Shipping lines

The **Shipping lines** tab displays the associated order lines, along with options to **Add** and **Delete** lines depending on the state of the order.

The screenshot shows the 'Shipping lines' tab selected in the 'Shipping order' interface. The tab is highlighted with a green box. Below the tab, there is a table with 3 items. The table has columns for ID, Status, Material, Packaging, Quantity, and Available. The data is as follows:

ID	Status	Material	Packaging	Quantity	Available
1	Created	SPAT03-LOT	EA	5	Packaging: 50 B...
2	Created	SPAT01-LOT	EA	25	Packaging: 75 B...
3	Created	SPAT03-LOT	Box	3	Packaging: 33 B...

Shipping line information

#:	The Shipping line number.
Status:	The Status of the shipping line.
Material:	The material in the shipping line.
Packaging:	The Packaging UOM of the material in the shipping line.
Picked:	The quantity picked out of the total quantity for the shipping line.
Available:	The quantity of material available for the shipping line.
Lot:	The Lot assigned to the material in the shipping line.
Vendor lot:	The Vendor Lot assigned to the material in the shipping line.
License plate:	The License Plate ID for the shipping line.
Serial number:	The serial number of the material in the shipping line.
Line notes:	Any notes for the shipping line.

Contacts

The **Contacts** tab displays the Order's Contacts, along with options to **Add** or **Delete** Contacts.

Type *	First name *	Last name	Line 1 *	Line 2	City	State	Postal code	Country	Attention of	Phone	Email	Notes
Shipping	Bob	Bobson	Bobbit Lane		Bob Town	TX	2034965	United States				

Contacts information

Type:	The Type of contact for the order.
First Name:	The first name of the contact.
Last Name:	The last name of the contact.
Line 1:	The contact's address line 1.
Line 2:	The contact's address line 2.
City:	The city of the contact's address.
State:	The state of the contact's address.
Postal Code:	The postal code of the contact's address.
Country:	The country of the contact's address.
Attention of:	The 'Attention of' for the contact, when applicable.
Phone:	The phone number of the contact.
Email:	The email address of the contact.
Notes:	Any notes for the contact.

Instructions

The **Instructions** tab displays the order's Instructions for the warehouse regarding certain parts of the process, along with options to **Add** and **Delete** Instructions.

Shipping lines

Contacts

Instructions

1 item

Delete

Filter

Type

Instructions

URL

Enabled

Created by

Created on

Modified by

Modified on

Pack

Updated promotional paper to be added

spatric@datexcorp.com

08/28/2025

spatric@datexcorp.com

08/28/2025

Add row

Instructions Information

- Type: The Type of instruction.
- Instructions: The instructions themselves.
- URL: The instructions URL.
- Enabled: Indicates whether or not the instruction is enabled.
- Created By: The logged in user who created the instruction.
- Created On: The date the instruction was created.
- Modified By: The logged in user who modified the instruction.
- Modified On: The date the instruction was modified.

Picked

The **Picked** tab displays information on completed pick tasks for the shipping order.

Shipping linesContactsInstructionsPickedActivity

1 item

Filter

Line #	Material	Lot	Vendor lot	Pallet	Total expected	Actual
1	SPAT01-LOT	3861	041725	8238	25 EA	25 EA

Picked information

- Line #: The Order Line Number for the Pick Task.
- Material: The material in the Pick Task.
- Lot: The lot assigned to the material in the task.
- Vendor Lot: The Vendor Lot assigned to the material in the task.
- Pallet: The pallet to which the materials are moved for shipping.
- Total expected: The expected quantity of the material and UOM to be picked for the Pick Task.

Actual: The quantity of material and UOM actually picked for the task.

Activity

The **Activity** tab displays the order's task history in the warehouse, including details such as material, user, completed date and more.

ID	Warehouse	Operation code	Status	Material	Lot	Serial number	Actual	Actual target pallet	Expected	Created date	Completed date	Notes
981054	Sara-Demo Warehouse	Picking	Completed	SPAT01-LOT	3861		25 EA	8238	25 EA	08/28/2025, 8:03 PM	08/28/2025, 8:18 PM	

Activity Information

ID:	A system-generated field containing the system's unique ID for this particular Activity.
Warehouse:	A system-generated field containing the warehouse where the Activity for the order took place.
Operation code:	The Activity's Operation code identifying what kind of activity this is.
Status:	The status of the Activity.
Material:	The LookUp Code of the material in the Activity.
Lot:	The lot assigned to the material in the Activity.
Serial number:	The serial number of the material in the Activity, when applicable.
Actual:	The actual amount and UOM of the material for the Activity.
Actual target pallet:	The actual pallet inventory ended on for the Activity.
Expected:	The expected amount and UOM of the material for the Activity.
Created date:	The date and time the Activity was created.
Completed date:	The date and time the Activity was completed.
Notes:	Any notes added to the Activity when it was performed.

Orders Hub > Outbound Order 8238

1819 @ 08/30/2025, 2:00 PM | Cancel | Delete | | | | |

Order header

SO 8238 for Project SPatric Warehouse Sara-Demo Warehouse

Order state

Ready to pick (Wave 2560 released)

Ship to contact

Joe Smith, 5560 North St., Tampa, FL 33647, United States

Clear

Details

Notes

Additional notification needed after leaving warehouse.

Total amount

25

Total picked

0

Total gross picked

0

Shipping lines

Contacts

Instructions

Activity

1 item

Delete

Filter

#	Status	Material *	Packaging *	Picked *	Available	Lot	Vendor lot	Licenseplate	Serial number	Line notes
1	Working	SPAT01-LOT	EA	0 / 25	Packaging: 75 B...					

Receiving order

The Receiving order can be opened for further review and management by clicking the **Order** number.

The Receiving order's basic information will be displayed, including the **Order number**, **Order class**, **Project**, **Warehouse**, and **Order status**. The **Details** section can be opened for more information about the order.

Icons along the top of the receiving order provide options to manage the order. For more details, please visit the [Receiving order toolbar](#) section below.

Receiving order details

Orders Hub > Receiving Order 8209

Appointment | Cancel | Delete | [Edit] [Print] [Share] [More]

Order header
PO 8209 for Project SPatric Warehouse Sara-Demo Warehouse

Order state
Created

Ship from contact
Larry Mater, 1256 North Ave., Santa Fe, NM, 55665, United States

Order header: The short name of the Order Class assigned to the order, the system-generated Order Lookup, followed by the Project associated with the order and the Warehouse to order will arrive at.

Order state: The current status of the order dependent on where in the inbound handling process the order is at.

Ship from contact: This is the address associated with the order. Only visible when a Contact has been added or selected.

Details

Owner reference

OREF082225

Vendor reference

VREF082925

Expected date

08/29/2025, 12:00 AM

Carrier

FedEx Freight

Trailer number

IL034401

Seal number

900921333

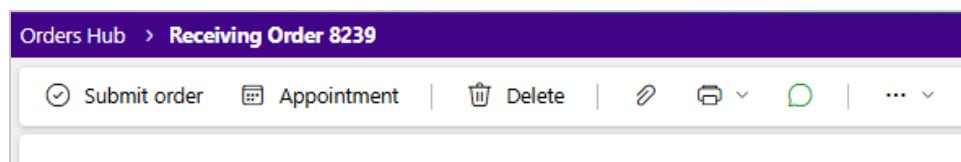
Notes

Please verify additional documentation is with shipment paperwork.

- Owner reference:** The Reference Number given to the Order for the Owner's Reference.
- Vendor reference:** The Reference Number given to the Vendor for the Vendor's Reference.
- Expected date:** The Date the Delivery is Expected by, if specified in the Order's creation.
- Carrier:** The Carrier specified for the Order.
- Trailer number:** The Trailer Number for the Order.
- Seal number:** The Seal Number for the Order.
- Notes:** Any Notes for the Order.

Receiving order toolbar

The receiving order toolbar provides functions needed to manage the receiving order. Icons in the toolbar vary depending upon the status of the order.



Submit order: The button to **Submit the order** in **Wait** status to the warehouse for further processing.

Appointment: The **Appointment** button opens the Dock Appointment window for

creation.

- Cancel:** The **Cancel** button stops the order once it's been started.
- Delete:** The **Delete** button deletes the order.
- Attachments:** The **Attachments** paperclip button opens the Attachments window for the selected order.
- Print:** The **Print** icon opens a drop-down list of all files available for the order that can be opened and printed. If only one relevant printable exists, it will open automatically when clicking the icon.
- Discussions:** The speech bubble button will open the **Discussions** flyout to add and review comments.
- Options... Dropdown:** The Shipping order ... dropdown button opens to provides the ability to **review the history of auto-emailed reports**, and associate a Ship to address to the order.

Receiving orders tabs

The receiving order's **Receiving lines**, **Contacts**, **Received**, and **Activity** are listed in the tabs along the bottom. Each tab on the receiving order displays its own set of information and options for managing that information. Expand the sections below for more details about each tab.

Receiving lines

The **Receiving lines** tab displays the order's order lines, along with options to **Add** and **Delete** lines depending on the state of the order.

Error	#	Status	Material *	Packaging *	Expected *	Lot	Vendor lot	Line notes
	1	Working	SPAT03-LOT	Box	50 of 50	04032025	05032025	

Shipping line information

- #:** The Receiving Line Number.
- Status:** The Status of the receiving line.
- Material:** The Material in the receiving line.
- Packaging:** The Packaging UOM of the material in the receiving line.
- Expected:** The quantity picked out of the total expected quantity for the receiving line.

Lot: The Lot assigned to the material in the shipping line.
Vendor lot: The Vendor Lot assigned to the material in the shipping line.
Line notes: Any notes for the shipping line.

Contacts

The **Contacts** tab displays the Order's Contacts, along with options to **Add** or **Delete** Contacts.

Receiving lines

Contacts

Received

Activity

1 item

Delete

Filter

Type *

First name *

Last name

Line 1 *

Line 2

City

State

Postal code

Country

Attention of

Phone

Email

Notes

Shipping

Larry

Mater

1256 North Ave.

Santa Fe

NM

55665

United States

Add row

Contacts information

Type: The Type of contact for the order.
First Name: The first name of the contact.
Last Name: The last name of the contact.
Line 1: The contact's address line 1.
Line 2: The contact's address line 2.
City: The city of the contact's address.
State: The state of the contact's address.
Postal Code: The postal code of the contact's address.
Country: The country of the contact's address.
Attention of: The 'Attention of' for the contact, when applicable.
Phone: The phone number of the contact.
Email: The email address of the contact.
Notes: Any notes for the contact.

Received

The **Received** tab displays information on completed receiving tasks for the order.

Receiving lines

Contacts

Received

Activity

1 item

Filter

Line #	Material	Lot	Vendor Lot	Pallet	Expected	Actual
1	SPAT03-LOT	04032025	05032025	LPSP082825_001	50 Box	50 Box

Received information

Line #:	The Order Line Number for the Receive task.
Material:	The Material in the Receive task.
Lot:	The lot assigned to the material in the task.
Vendor Lot:	The Vendor Lot assigned to the material in the task.
Pallet:	The pallet to which the materials are received to.
Expected:	The expected quantity of the material and UOM to be expected for the Receive task.
Actual:	The quantity of material and UOM actually received for the task.

Activity

The **Activity** tab displays the order's task history in the warehouse, including details such as material, user, completed date and more.

Receiving lines Contacts Received **Activity** 1 item

Filter

Q

ID	Warehouse	Operation code	Status	Material	Lot	Serial number	Expected	Actual	Created date	Completed date	Actual source pallet
981061	Sara-Demo Warehouse	Receiving	Completed	SPAT03-LOT	04032025	50 Box	50 Box	50 Box	08/28/2025, 9:15 PM	08/28/2025, 9:15 PM	LPSP082825_001

Activity Information

ID:	A system-generated field containing the system's unique ID for this particular Activity.
Warehouse:	A system-generated field containing the warehouse where the Activity for the order took place.
Operation Code:	The Activity's Operation Code identifying what kind of activity this is.
Status:	The status of the Activity.
Material:	The LookUp Code of the material in the Activity.
Lot:	The lot assigned to the material in the Activity.
Serial number:	The serial number of the material in the Activity, when applicable.
Expected:	The expected amount and UOM of the material for the Activity.
Actual:	The actual amount and UOM of the material for the Activity.
Created date:	The date and time the Activity was created.
Completed date:	The date and time the Activity was completed.
Actual source pallet:	The actual pallet inventory began on for the Activity.

- Actual target pallet:

The actual pallet inventory ended on for the Activity.
- Notes:

Any notes added to the Activity when it was performed.

Orders Hub > Receiving Order 8209

Appointment

Cancel

Order header

PO 8209 for Project SPatric Warehouse Sara-Demo Warehouse

Total amount

50

Total received

750

Total gross received

40.8

Order state

Ready to complete

Ship from contact

Larry Mater, 1256 North Ave., Santa Fe, NM, 55665, United States

Clear

Details

Notes

Please verify additional documentation is with shipment paperwork.

Receiving lines

Contacts

Received

Activity

1 item

Delete 8209

Import

Export

Filter

Error

#

Status

Material *

Packaging *

Expected *

Lot

Vendor lot

Line notes

1

Working

SPAT03-LOT

Box

50 of 50

04032025

05032025

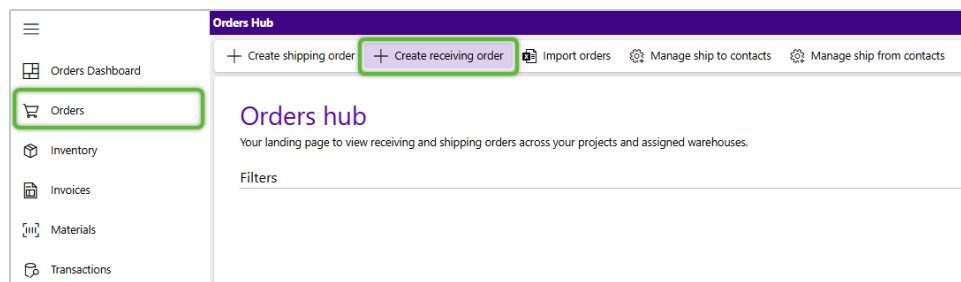
Add row

Create and submit a Receiving order

Receiving orders, or Purchase orders, are the beginning of the process to get inventory into the Warehouse. The Receiving Order specifies what, how much, where it's coming from, and how you are going to get it. Once created, the Order must be submitted for the Warehouse to see it. Limited management can be handled from the Orders Hub. Orders can also be **imported**.

Create a new Receiving order

1. From the **Orders Hub**, click the option to **+ Create receiving order**.



The **Owner**, **Project** and **Warehouse** will populate automatically, however they can be updated if other options are available. The **Order class** defaults to a set value and cannot be changed.

2. (Optional): Input an **Owner reference**.
3. Click **Save** to proceed with the selected options and open the new order.

The screenshot shows the 'Create Receiving Order' form in the Orders Hub. The form has a purple header bar with 'Orders Hub > Create Receiving Order'. Below the header, there are two buttons: 'Save' (highlighted with a green box) and 'Discard'. The form contains several fields:

- Owner ***: A dropdown menu with 'SPatric' selected.
- Project ***: A dropdown menu with 'SPatric' selected.
- Warehouse ***: A dropdown menu with 'Sara-Demo Warehouse' selected.
- Order class ***: A text field with 'PO' entered.
- Owner reference**: A text field with 'OREF082225' entered.

4. (Optional): Enter additional information on shipping, carriers, and vendor under the **Details** section that can be opened by clicking the down pointing arrow.

Receiving order details

Orders Hub > Receiving Order 8209

Appointment

Cancel

Delete

Order header

PO 8209 for Project SPatric Warehouse Sara-Demo Warehouse

Order state

Created

Ship from contact

Larry Mater, 1256 North Ave., Santa Fe, NM, 55665, United States

Order header: The short name of the Order Class assigned to the order, the system-generated Order Lookup, followed by the Project associated with the order and the Warehouse to order will arrive at.

Order state: The current status of the order dependent on where in the inbound handling process the order is at.

Ship from contact: This is the address associated with the order. Only visible when a Contact has been added or selected.

Details

Owner reference

OREF082225

Vendor reference

VREF082925

Expected date

08/29/2025, 12:00 AM

Carrier

FedEx Freight

Trailer number

IL034401

Seal number

900921333

Notes

Please verify additional documentation is with shipment paperwork.

Owner reference: The Reference Number given to the Order for the Owner's Reference.

Vendor reference: The Reference Number given to the Vendor for the Vendor's Reference.

Expected date: The Date the Delivery is Expected by, if specified in the Order's creation.

Carrier: The Carrier specified for the Order.

Trailer number: The Trailer Number for the Order.

Seal number: The Seal Number for the Order.

Notes: Any Notes for the Order.

5. Click the green **+ Add Row** option at the bottom of the **Receiving lines** tab to begin specifying the incoming inventory.
 6. Select a **Material** from the list available to the Project.
 7. Select the correct **Packaging** and enter the required **Quantity**.
 8. Click the green checkmark at the end of the row.
- Repeat steps 5-8 to add more order Lines.

Orders Hub > Receiving Order 8209

Submit order Appointment Delete

Order header
PO 8209 for Project SPatric Warehouse Sara-Demo Warehouse

Order state
Wait

Details

Notes

Receiving lines Contacts Activity

Delete Import Export

0 items

Error	Status	Material *	Packaging *	Quantity *	Lot	Vendor lot	Line notes
		SPRAT03-LOT - SPRAT03-LOT	Box	50	04032025	05032025	

No results found

Add row

Total amount
No data to display

9. (Optional): Click the **Contacts** tab to add one-off address types.

The screenshot shows the 'Receiving Order 8209' interface. The 'Order header' section displays 'PO 8209 for Project SPatric Warehouse Sara-Demo Warehouse' and 'Order state: Wait'. A 'Total amount' box shows '50'. The 'Details' section is collapsed, and the 'Notes' section is expanded, showing a message: 'Please verify additional documentation is with shipment paperwork.' Below this, the 'Receiving lines' section has tabs for 'Contacts' and 'Activity'. The 'Contacts' tab is active, showing a table with columns: Type, First name, Last name, Line 1, Line 2, City, State, Postal code, Country, Attention of, Phone, Email, and Notes. A single row is visible with the following data: Shipping, Larry, Mater, 1256 N..., Sa..., NM, 55665, United..., and a green checkmark in the Notes column. A 'Delete' button is located above the table. A 'Filter' input field is on the right. At the bottom, there is an 'Add row' button and a message 'No results found'.

10. (Optional): If you have any addresses stored in your contact book, you can select one by using the Ship from contact book button under the additional options menu.

The screenshot shows the 'Receiving Order 8209' interface. The 'Order header' section displays 'PO 8209 for Project SPatric Warehouse Sara-Demo Warehouse' and 'Order state: Wait'. A dropdown menu is open, showing two options: 'Email requests' and 'Ship from contact book'. The 'Ship from contact book' option is highlighted.

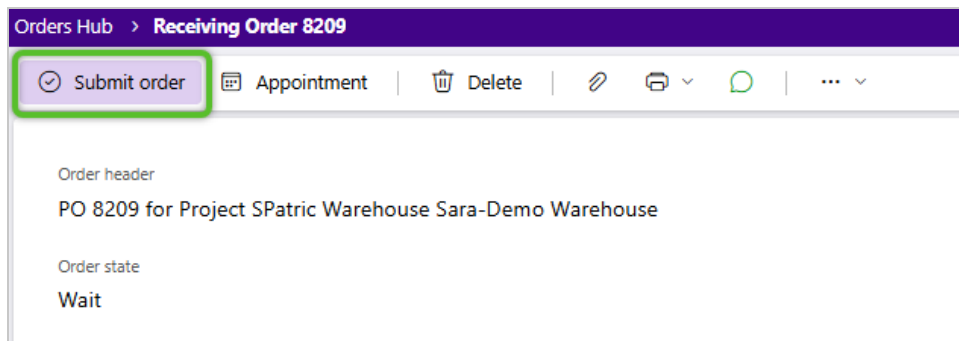
11. (Optional): Use the Order toolbar options to **Add a Dock Appointment**, **Add attachments**, or **use the Discussion tool** to leave a comment for the warehouse when the order is submitted.

The screenshot shows the 'Receiving Order 8209' interface. The 'Order header' section displays 'PO 8209 for Project SPatric Warehouse Sara-Demo Warehouse' and 'Order state: Wait'. The 'Details' section is expanded. The toolbar at the top contains several buttons: 'Submit order', 'Appointment', 'Delete', a pencil icon, a document icon, a speech bubble icon, and a three-dot menu. The 'Appointment' button is highlighted with a green box.

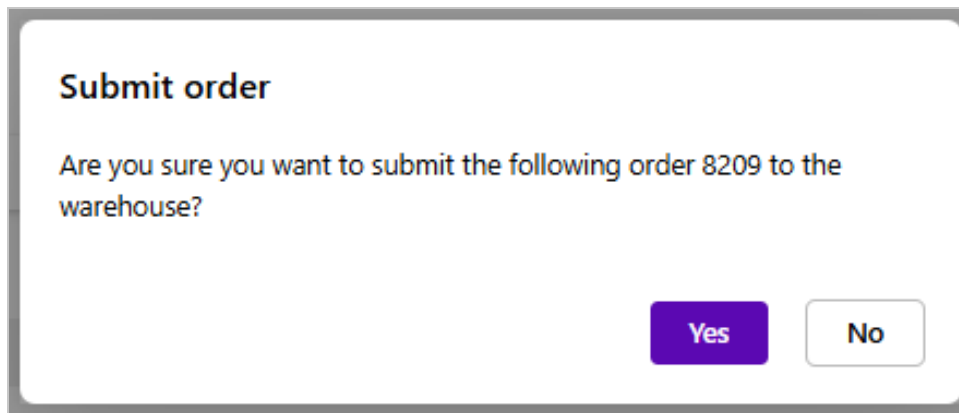
12. Finally, when the order is ready and you want to send it to the warehouse's Footprint WMS to manage, click the **Submit order** button.

Note

The Footprint WMS can't see the order until it is submitted and in **Created** status.



12. In the confirmation pop-up, click **Yes**.



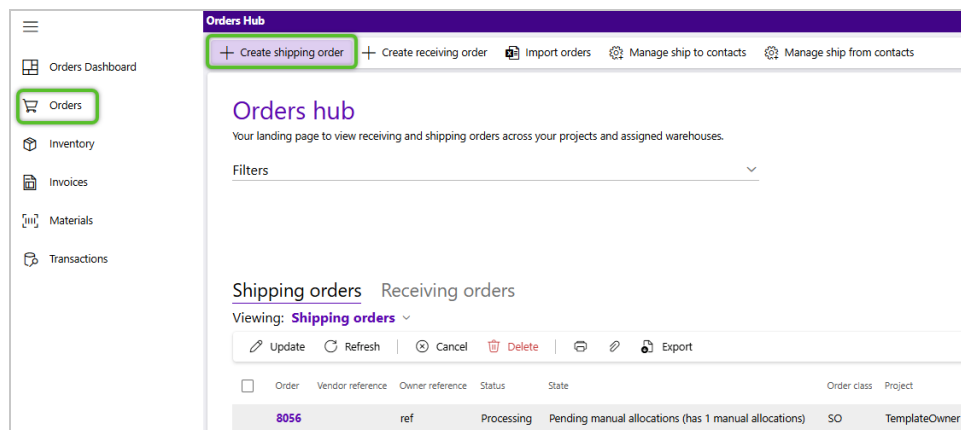
Now that you've created and submitted the order it will be visible to the warehouse's Footprint WMS to begin managing. You can find it in **Created** status on the **Receiving orders** tab of the **Orders hub** and the **Orders Dashboard**.

Create and submit a shipping order

Shipping orders identify outgoing inventory. Once created, the order can be managed from the Orders hub. Shipping orders can also be **imported**.

Create a new Shipping Order

1. From the **Orders hub**, click the option to **+ Create shipping order**.



The **Owner**, **Project** and **Warehouse** will populate automatically, however they can be updated if other options are available. The **Order class** defaults to a set value and cannot be changed.

2. (Optional): Input a reference number for the Order.
3. Click **Save** to proceed with the selected options and open the new order.

The screenshot shows the 'Create Shipping Order' form in the Orders Hub. The form has a purple header bar with the text 'Orders Hub > Create Shipping Order'. Below the header, there are two buttons: 'Save' (highlighted with a green box) and 'Discard'. The form contains several input fields:

- Owner ***: A dropdown menu with 'SPatric' selected.
- Project ***: A dropdown menu with 'SPatric' selected.
- Warehouse ***: A dropdown menu with 'Sara-Demo Warehouse' selected.
- Order class ***: A text field with 'SO' entered.
- Owner reference**: A text field with 'REF00250825' entered.

4. (Optional): Enter additional information on shipping, carriers, and vendor under the **Details** section that can be opened by clicking the down pointing arrow.

Shipping order details

The screenshot displays the 'Outbound Order 8238' details page. At the top, there is a purple header bar with the text 'Orders Hub > Outbound Order 8238'. Below this is a toolbar with icons for Appointment, Cancel, Delete, and other actions. The main content area is divided into sections: 'Order header' with the text 'SO 8238 for Project SPatric Warehouse Sara-Demo Warehouse', 'Order state' with the text 'Created', and 'Ship to contact' with the text 'Joe Smith, 5560 North St., Tampa, FL, 33647, United States'.

Order header: The short name of the Order class assigned to the order, the system-generated Order lookup, followed by the Project associated with the order and the warehouse to order will arrive at.

Order state: The current status of the order in the outbound handling process.

Ship from contact: This is the address associated with the order. Only visible when a Contact has been added or selected.

Details

Owner reference

REF00250825

Vendor reference

VREF-082525

Expected date

08/29/2025, 12:00 PM

Container identifier

Carrier

FedEx

Service

FedEx Ground

Notes

Additional notification needed after leaving warehouse.

- Owner reference:

The reference number given to the Order for the Owner's reference.
- Vendor reference:

The reference number given to the vendor for the Vendor's reference.
- Expected date:

The date the delivery is expected by, if specified in the order's creation.
- Container identifier:

The Container ID specified for the order.
- Carrier:

The Carrier specified for the order. (Can only select those Carriers assigned to the Owner)
- Service:

The Service specified for the order.
- Notes:

Any Notes for the order.

5. Click the green **+ Add Row** option at the bottom of the **Lines** tab to begin specifying the inventory to be shipped out.

6. Select a **Material** from the list available to the Project.
7. Select the correct **Packaging** and enter the required **Quantity**.

Note

If a Lot is not selected for a Line, the default is the Material 's Allocation Strategy.

8. Click the checkmark at the end of the row.
- Repeat steps 5-8 to add more order Lines.

The screenshot shows the 'Shipping lines' tab with a table containing one row. The row has columns for Status, Material, Packaging, Quantity, Available, Lot, and Vendor set. The values are: Status (empty), Material (SPAT01-LOT - SPAT01-LOT), Packaging (EA), Quantity (25), Available (empty), Lot (empty), and Vendor set (empty). A green checkmark is visible at the end of the row. Below the table is an 'Add row' button.

Status	Material *	Packaging *	Quantity *	Available	Lot	Vendor set
	SPAT01-LOT - SPAT01-LOT	EA	25			

Add row

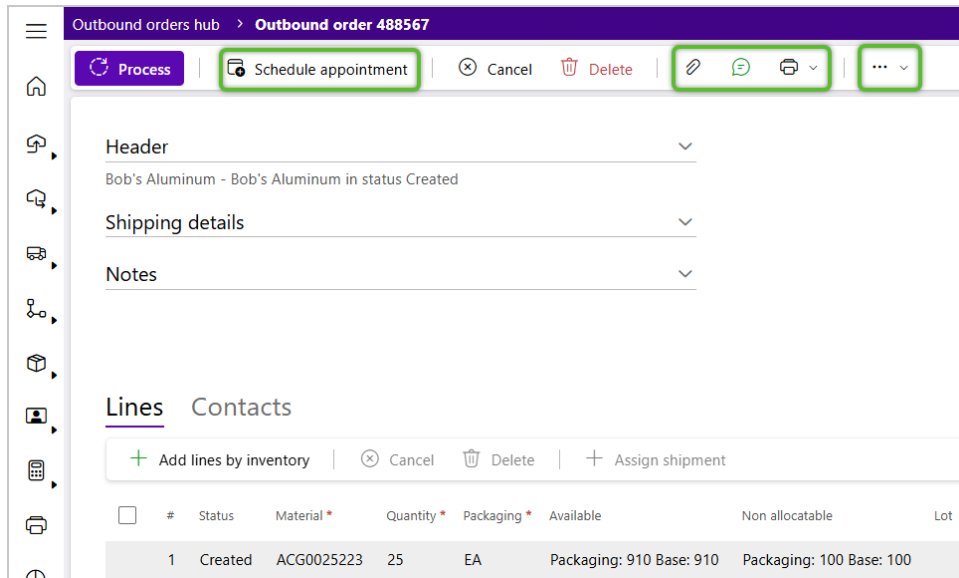
9. (Optional): Click the **Contacts** tab to add contacts and/or the **Instructions** tab to add Instructions.

The screenshot shows the 'Instructions' tab with a table containing one row. The row has columns for Type, Instructions, URL, Enabled, Created by, Created on, Modified by, and Modified on. The values are: Type (Pack), Instructions (Include updated info ins.), URL (empty), Enabled (checked), Created by (empty), Created on (empty), Modified by (empty), and Modified on (empty). A green checkmark is visible at the end of the row. Below the table is an 'Add row' button.

Type *	Instructions *	URL	Enabled *	Created by	Created on	Modified by	Modified on
Pack	Include updated info ins.		☒				

Add row

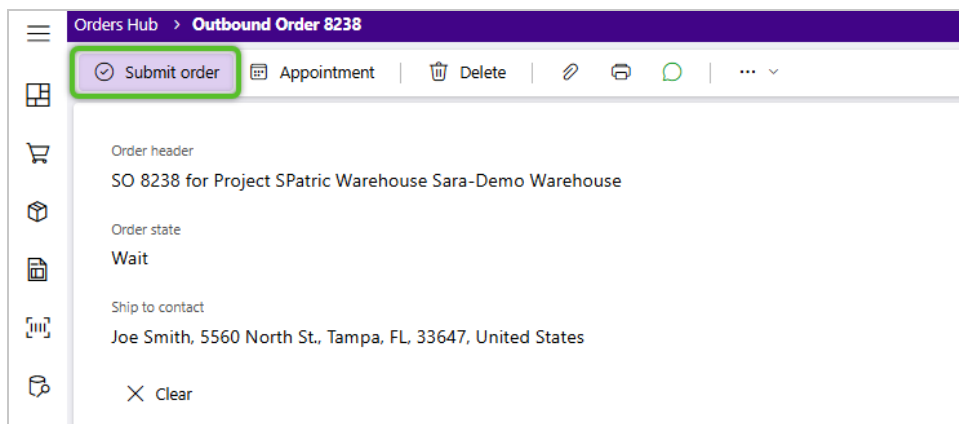
10. (Optional): Use the Order toolbar options to **Add a Dock Appointment**, **Add attachments**, or **use the Discussion tool** to leave a comment for the warehouse when the order is submitted.



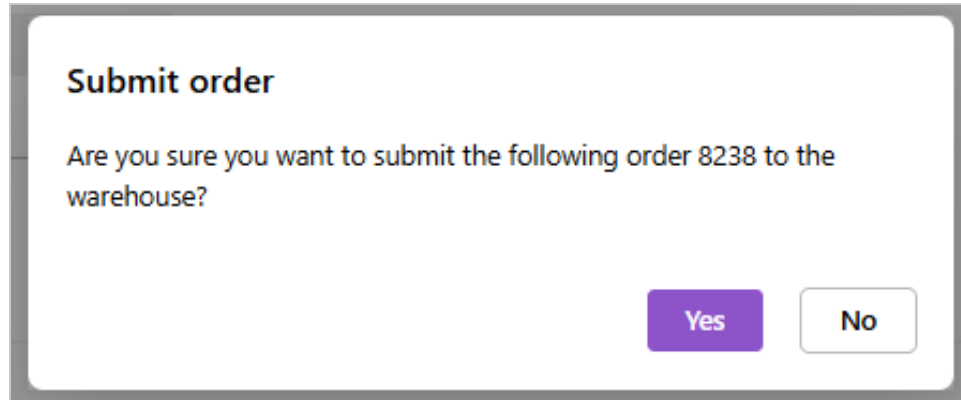
12. Finally, when the order is ready and you want to send it to the Footprint WMS to manage, click the **Submit order** button.

Note

The warehouse can't see the order until it is submitted and in **Created** status.



12. In the confirmation pop-up, click **Yes**.



Now that you've created and submitted the order it will be visible to the warehouse's Footprint WMS to begin managing. You can find it in **Created** status on the **Shipping orders** tab of the **Orders hub** and the **Orders Dashboard**.

Import Orders

Imported orders will appear alongside other orders in **Created** status for review and management purposes.

Please Note

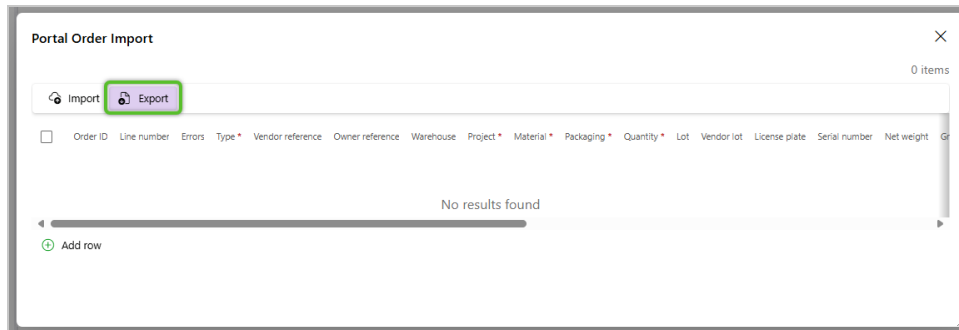
- For the most comprehensive import, we recommend downloading the latest template file with up-to-date features and fields.
- The import process is intended for creating new records. Enter as many details as possible when importing, as attempting to update existing records will result in an error.
- All date values must follow the MM/DD/YYYY format. If the spreadsheet contains dates, please double-check they are formatted accordingly before proceeding with the import process.
- Imports are limited to 5000 lines. Please break down larger imports into files with no more than 5000 lines.

1. From the **Orders hub**, click the **Import orders** button.

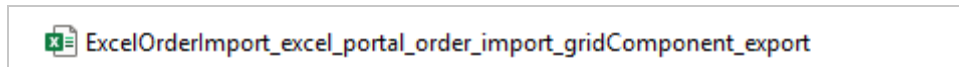
The screenshot shows the 'Orders Hub' interface. On the left is a sidebar with a menu containing 'Orders Dashboard', 'Orders' (highlighted with a green box), 'Inventory', 'Invoices', 'Materials', and 'Transactions'. The main content area has a header bar with 'Orders Hub' and 'Receiving Order 8209'. Below this is a navigation bar with buttons: '+ Create shipping order', '+ Create receiving order', 'Import orders' (highlighted with a green box), 'Manage ship to contacts', and 'Manage ship from contacts'. The main area is titled 'Orders hub' and contains a 'Filters' dropdown. Below this are tabs for 'Shipping orders' and 'Receiving orders'. Under the 'Receiving orders' tab, there are action buttons: 'Update', 'Refresh', 'Cancel', 'Delete', and 'Export'. At the bottom is a table with columns: Order, Vendor reference, Owner reference, Status, Order class, Project, Total items, Created, and Expected. The table contains one row with the following data: 8209, VREF082925, OREF082225, Wait, PO, SPatric, 750, 8/18/2025, 2:03 PM, 8/29/2025, 12:00 AM.

Order	Vendor reference	Owner reference	Status	Order class	Project	Total items	Created	Expected
8209	VREF082925	OREF082225	Wait	PO	SPatric	750	8/18/2025, 2:03 PM	8/29/2025, 12:00 AM

2. In the **Portal Order Import** window, click the **Export** button to download the template.



3. Locate the file named 'ExcelOrderImport_excel_portal_order_import_gridComponent_export' and double click on it to open it.



Important

To avoid errors when importing, do not make changes to the name of any column. This will cause the automated import process to fail.

4. Column A is required. It is the column to indicate if the order is either **Shipping** for an outbound Shipping order or **Receiving** for an incoming Receiving order.

	A	B	C	D	E	F	G	H	I	J
1	Type	VendorReference	OwnerReference	Warehouse	ProjectLookupCode	MaterialLookupCode	Packaging	Quantity	LotLookupCode	VendorLotLookupCode
2	Receiving			Sara-Demo Warehouse	SPatric	SPAT03-LOT	EA	50		
3	Receiving			Sara-Demo Warehouse	SPatric	SPAT03-LOT	EA	25		
4	Receiving			Sara-Demo Warehouse	SPatric	SPAT01-LOT	Case	5		
5	Receiving			Sara-Demo Warehouse	SPatric	SPAT01-LOT	EA	35		
6										

5. Do not change the values populated in columns D, and E, indicating the **Warehouse** and **ProjectLookupCode**. Only copy them to additional rows as needed. Input **MaterialLookupCode**(s) in column F. This is the lookup code for the item being either received or shipped out. Only one should be input per row.

	A	B	C	D	E	F	G	H	I	J
1	Type	VendorReference	OwnerReference	Warehouse	ProjectLookupCode	MaterialLookupCode	Packaging	Quantity	LotLookupCode	VendorLotLookupCode
2	Receiving			Sara-Demo Warehouse	SPatric	SPAT03-LOT	EA	50		
3	Receiving			Sara-Demo Warehouse	SPatric	SPAT03-LOT	EA	25		
4	Receiving			Sara-Demo Warehouse	SPatric	SPAT01-LOT	Case	5		
5	Receiving			Sara-Demo Warehouse	SPatric	SPAT01-LOT	EA	35		
6										
7										
8										
9										

Important

When adding data to the import file, all capitalization, spelling, and spacing-- including spaces at the beginning or end that may not be easily seen, must match exactly with the **Warehouse**, **ProjectLookupCode**, and **MaterialLookupCode** values as they appear in the application or an error will occur when importing.

6. Column G is required. Select the specific type of **Packaging** for each material.

	A	B	C	D	E	F	G	H	I	J
1	Type	VendorReference	OwnerReference	Warehouse	ProjectLookupCode	MaterialLookupCode	Packaging	Quantity	LotLookupCode	VendorLotLookupCode
2	Receiving			Sara-Demo Warehouse	SPatric	SPAT03-LOT	EA	50		
3	Receiving			Sara-Demo Warehouse	SPatric	SPAT03-LOT	EA	25		
4	Receiving			Sara-Demo Warehouse	SPatric	SPAT01-LOT	Case	5		
5	Receiving			Sara-Demo Warehouse	SPatric	SPAT01-LOT	EA	35		
6										
7										
8										
9										

Important

To avoid errors when importing, the **Packaging** data added in column H of the import file must be an available packaging type as it appears in the application for the material (**MaterialLookupCode**) listed in column G.

7. Column H, is required. Here you enter the **Quantity** of each material listed.

	A	B	C	D	E	F	G	H	I	J
1	Type	VendorReference	OwnerReference	Warehouse	ProjectLookupCode	MaterialLookupCode	Packaging	Quantity	LotLookupCode	VendorLotLookupCode
2	Receiving			Sara-Demo Warehouse	SPatric	SPAT03-LOT	EA	50		
3	Receiving			Sara-Demo Warehouse	SPatric	SPAT03-LOT	EA	25		
4	Receiving			Sara-Demo Warehouse	SPatric	SPAT01-LOT	Case	5		
5	Receiving			Sara-Demo Warehouse	SPatric	SPAT01-LOT	EA	35		
6										
7										
8										
9										

8. When applicable, enter the optional details for each order, keeping in mind that the import process is not intended for future data updates.

	A	B	C	D	E	F	G	H	I	J
1	Type	VendorReference	OwnerReference	Warehouse	ProjectLookupCode	MaterialLookupCode	Packaging	Quantity	LotLookupCode	VendorLotLookupCode
2	Receiving			Sara-Demo Warehouse	SPatric	SPAT03-LOT	EA	50		
3	Receiving			Sara-Demo Warehouse	SPatric	SPAT03-LOT	EA	25		
4	Receiving			Sara-Demo Warehouse	SPatric	SPAT01-LOT	Case	5		
5	Receiving			Sara-Demo Warehouse	SPatric	SPAT01-LOT	EA	35		
6										
7										
8										
9										

9. Save and close the spreadsheet. Click **Import** button in the Portal Import Order window to select the file for upload.

Portal Order Import

0 items

Import

Export

☐ Order ID Line number Errors Type * Vendor reference Owner reference Warehouse Project * Material * Packaging * Quantity *

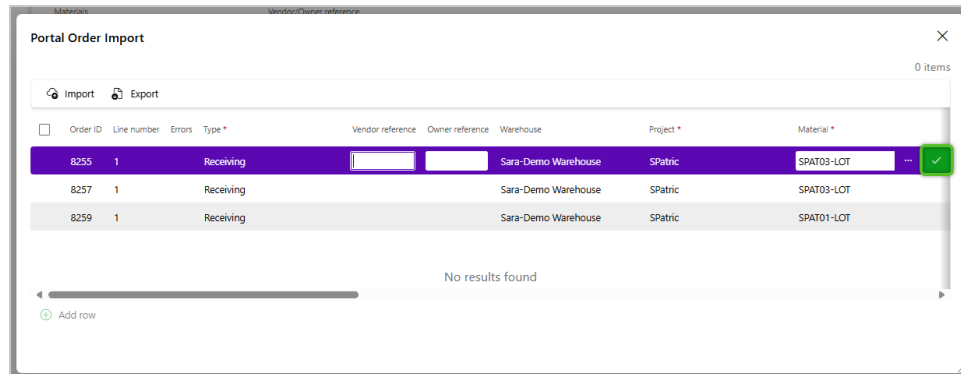
No results found

+

 Add row

The order details will display for review and edits.

Click into a row to make changes to an order, then click the green checkmark on the right to update the order details.



Portal Order Import

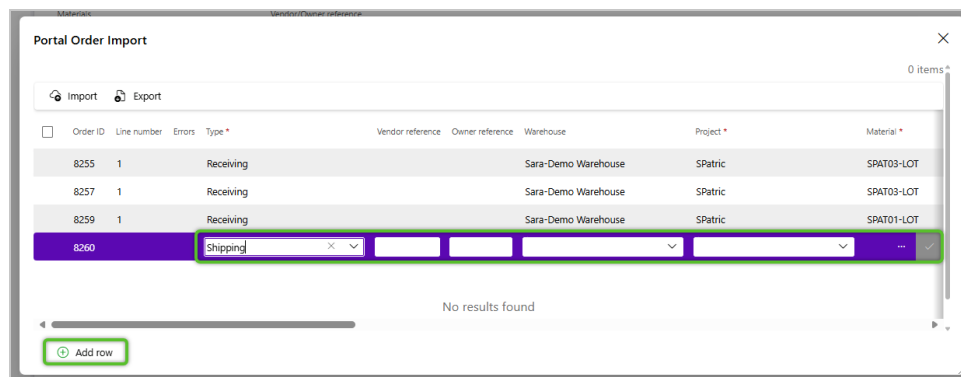
Import Export

Order ID	Line number	Errors	Type *	Vendor reference	Owner reference	Warehouse	Project *	Material *
8255	1		Receiving			Sara-Demo Warehouse	SPatric	SPAT03-LOT
8257	1		Receiving			Sara-Demo Warehouse	SPatric	SPAT03-LOT
8259	1		Receiving			Sara-Demo Warehouse	SPatric	SPAT01-LOT

No results found

+ Add row

10. To add rows, click the + **Add Row** button at the bottom of the order list.



Portal Order Import

Import Export

Order ID	Line number	Errors	Type *	Vendor reference	Owner reference	Warehouse	Project *	Material *
8255	1		Receiving			Sara-Demo Warehouse	SPatric	SPAT03-LOT
8257	1		Receiving			Sara-Demo Warehouse	SPatric	SPAT03-LOT
8259	1		Receiving			Sara-Demo Warehouse	SPatric	SPAT01-LOT
8260			Shipping					

No results found

+ Add row

The newly imported orders will display alongside other orders in the **Orders hub**.

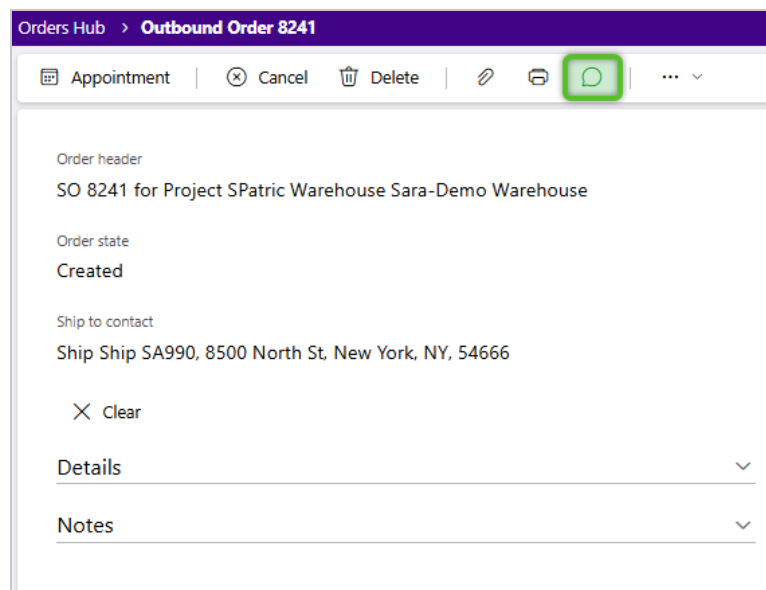
Discussions

Discussions can be started by adding Comments to Orders, Invoices, and other entities. These comments are seen not just here on Footprint Portal, but also on the warehouse's Footprint WMS. This allows for comments left to be reviewed and even responded to in either application.

⚠Prerequisites

- The Discussion feature must be enabled in both the WMS and the Portal

1. In the order, invoice, or other entity, locate the **Discussion** button - it looks like a speech bubble and in some places may be under the additional options dropdown (...)



Any previous Comments will be listed for review and response.

2. In the **Discussion** window, add a new comment or respond to an existing one by typing in the **New discussion** card, then click the **Save** button.

Discussions

2 items

Filter

New discussion

Add a comment. @ to mention a person.

Lot is 081225-001

Save

Cancel

spatric@datexcorp.com commented

8/12/2025, 2:49:03 PM

Please provide lot prior to processing

Read

Delete

3. To mark an existing comment as read, click the **Read** button in the comment card.

The color and appearance of the Discussions button will change depending on whether there are read or unread messages:



No comments have been made



There are unread comments

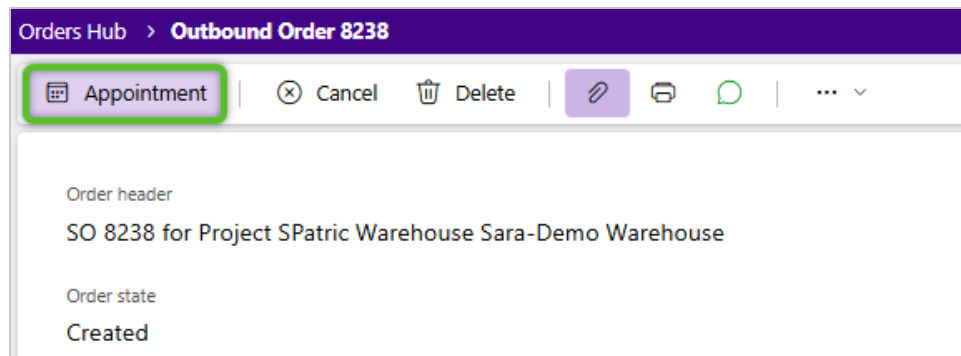


There are comments and they have all been read

Create a Dock Appointment

Dock Appointments allow you to associate an estimated shipment arrival time and carrier information to an order, allowing the warehouse to reserve a dock door for the anticipated arrival time. They are created from within an order and are automatically associated with it.

1. Click the **Appointment** button in the Order toolbar.



In the **Create Dock Appointment** window, the **Appointment Code**, **Type**, and **Status** will be populated.

2. Set a **Planned arrival**.
3. If necessary or known, select a **Carrier**, **Reference number** and **Notes**.
4. Once all fields have been set to desired values, click the **Save** button in the top left corner.

The Dock Appointment will display in the Order toolbar as the **Appointment code** with the **Planned arrival time**, replacing the **Appointment** button.

Create Dock Appointment

Save

Cancel

Appointment code *

1819

Type *

Outbound

Planned arrival *

08/30/2025, 2:00 PM

Status

Open

Carrier

FedEx

Reference number

REF083025

Notes

Will call with trailer numeber.

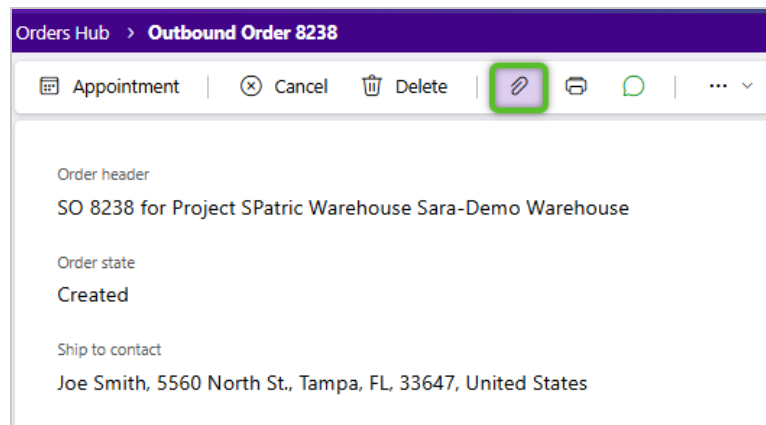
Add Attachments

Attachments can be added to many entities in Footprint Portal, allowing them to be opened and viewed as needed.

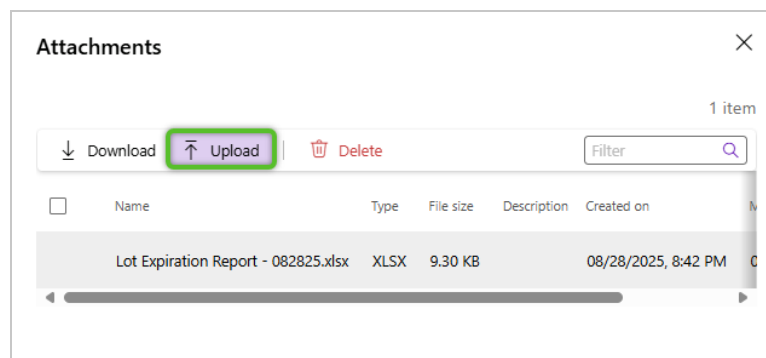
✂Prerequisites

- Any entity capable of storing an Attachment

1. Click the **Attachments** paperclip icon to open the Attachments flyout.



2. Click the **Upload** option to locate and select the file to attach.



The attachment will be added to the entity and can be viewed, downloaded, or deleted as needed.

Exporting grid data

Most grids in Footprint Portal contain data that you can filter and, once it is set to your liking, export as an Excel file. If there's a grid with data in Footprint Portal, more often than not it has an **Export** button. While the data being exported may change, the process remains consistent regardless of the grid.

1. To configure the data in the grid to your liking, regardless of the hub, click the down arrow to the right of the **Filters** header to open the section and review the parameters. As you make selections the data in the grid will update to reflect your choices. Additional filter options may be available in the grid depending on the hub.

Inventory Transactions Hub

Inventory transactions hub
Your landing page to view inbound and outbound order transactions and their related actions.

Filters

Owner * ▼ Project ▼
 Materials ▼ Warehouse ▼
 Created from ▼ Created to ▼
 Operation codes ▼
 Create Inventory, Inventory ... ▼

Transactions 10 items

Export

Order	Material	Operation code	Description	Created	Completed	Project	Owner reference	PO	Qty	Lot	Vendor ref	Rec date	Source	Target	Warehouse
8174	SPAT03-LOT	Receiving	SPAT03-LOT	08/11/2025	08/11/2025	SPatric			25	04033025	05033025	04/03/2025	SCWR-01		Sara Demo Warehouse
8174	SPAT03-LOT	Receiving	SPAT03-LOT	08/11/2025	08/11/2025	SPatric			25	04033025	05033025	04/03/2025	SCWR-01		Sara Demo Warehouse
8175	SPAT01-LOT	Receiving	SPAT01-LOT	08/11/2025	08/11/2025	SPatric			25	8861	041725	04/17/2025	SCWR-01		Sara Demo Warehouse
8175	SPAT01-LOT	Receiving	SPAT01-LOT	08/11/2025	08/11/2025	SPatric			25	8861	041725	04/17/2025	SCWR-01		Sara Demo Warehouse
8238	SPAT01-LOT	Picking	SPAT01-LOT	08/28/2025	08/28/2025	SPatric	REF00250825	VREF-082525	25	8861	041725	04/17/2025	F201	SCWS-01	Sara Demo Warehouse

2. Click the **Export** button in the grid toolbar.

Inventory Transactions Hub

Inventory transactions hub
Your landing page to view inbound and outbound order transactions and their related actions.

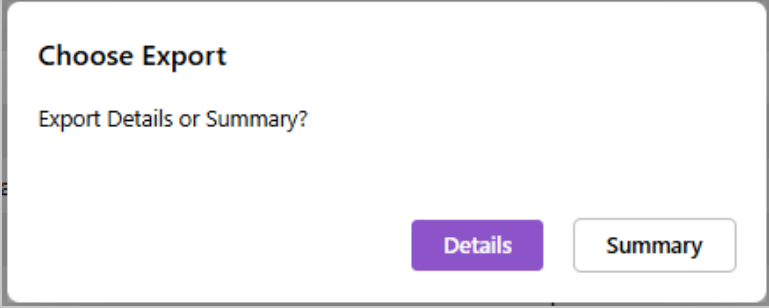
Filters ▼

Transactions

Export

Order	Material	Operation code	Description	Created	Completed	Project	Owner reference	PO	Qty
8174	SPAT03-LOT	Receiving	SPAT03-LOT	08/11/2025	08/11/2025	SPatric			25
8174	SPAT03-LOT	Receiving	SPAT03-LOT	08/11/2025	08/11/2025	SPatric			25
8175	SPAT01-LOT	Receiving	SPAT01-LOT	08/11/2025	08/11/2025	SPatric			25
8175	SPAT01-LOT	Receiving	SPAT01-LOT	08/11/2025	08/11/2025	SPatric			25
8238	SPAT01-LOT	Picking	SPAT01-LOT	08/28/2025	08/28/2025	SPatric	REF00250825	VREF-082525	25

3. For some grids, such as **Shipping orders** and **Receiving orders** you'll be offered the option to export with details or as a summary. In such cases you must select one to proceed. If no option is presented, it will automatically start the export and generate the Excel file.

A screenshot of a web application dialog box titled "Choose Export". The dialog box has a light gray border and a white background. Inside, the text "Export Details or Summary?" is displayed. At the bottom right, there are two buttons: a purple button labeled "Details" and a white button with a gray border labeled "Summary".

Choose Export

Export Details or Summary?

Details **Summary**

Portal Project guide

Sections

- [Overview](#)
- [Project records](#)
- [Shipping contacts](#)

Overview

Project records are effectively a high-level view of all your products and inventory on one page along with their activity history. You can also create materials, manage your shipping contacts and create and update your automated email rules.

Project records

The project record gives you the ability to create new materials, review your existing inventory, and perform some limited management activities.

Buttons along the top of the project record allow you to **create a new material** and setup and manage automated email rules.

Inventory can be displayed by Pallet, by Lot, or by Material using the **Inventory type** buttons.

Shipping contacts from both customers and suppliers can be managed via the **Ship to contacts** and **Ship from contacts** buttons.

Inventory details and quantities are listed in the **Inventory** tab, material details and information can be reviewed on the Materials tab, and inventory activity history displays in the **Activity** tab. Each tab on the **Inventory hub** displays its own set of information and options, if any, for managing that information. Data displayed can be **exported**. Expand the sections below for more details about each tab.

Inventory tab

The **Inventory tab** lists all current and incoming inventory (any inventory shipped out is not displayed) associated with your project. The **Inventory** tab toolbar also provides the option to export the inventory data displayed in the tab.

Inventory

Materials

Activity

Export

Filter

26 items

☐	Material	Lot	Pallet	Material name	Material description	Total amount	Available amount	Packaging	Warehouse	Project	Gross weight	Weight uOM	Receiving order	Vendor lot	Expiration date	Manufacture date	Received date
☐	SPAT03 LOT	04032025	LP041725 006	SPAT03 LOT	SPAT03 LOT	235	235	EA	Datex Dry	SPatric	106.594207	kg		05032025	05/03/2025	04/03/2025	04/03/2025
☐	SPAT01 LOT	3861	SPLP052925 001	SPAT01 LOT	SPAT01 LOT	20	20	EA	Sara-Demo Warehouse	SPatric	9.071847	kg		041725	05/31/2025	05/31/2025	04/17/2025
☐	SPAT03 LOT	04032025	SP040325 001	SPAT03 LOT	SPAT03 LOT	100	0	EA	Sara-Demo Warehouse	SPatric	45.359237	kg		05032025	05/03/2025	04/03/2025	04/03/2025
☐	SPAT03 LOT	04032025	SP040325 001	SPAT03 LOT	SPAT03 LOT	15	0	Box	Sara-Demo Warehouse	SPatric	12.246994	kg		05032025	05/03/2025	04/03/2025	04/03/2025

Inventory tab details - by pallet

Material:	The common lookup code for the material or product.
Lot:	The Lot ID of the inventory.
Pallet:	The lookup code of the pallet that inventory is located on.
Material name:	The alternative identifier for the material or product.
Material description:	The description of the material or product.
Total Amount:	The total amount of inventory for the material in the warehouse regardless of status.
Available amount:	The amount of inventory for the material that is available for allocation.
Packaging:	The packaging UOM of the material inventory.
Warehouse:	The warehouse in which the inventory is located.
Project:	The name of the project associated with the material inventory.

Gross weight:	The total weight of the material, including the packaging weight in the warehouse.
Weight UOM:	Unit of measurement for weight. Options include kilogram, gram, pound, ounce, ton, troy ounce, and metric ton.
Receiving order:	Incoming order the lot first came in on.
Vendor lot:	The vendor lot ID of the inventory.
Expiration Date:	The expiration date of the lot inventory.
Manufacture Date:	The manufacture date of the lot inventory.
Received Date:	The date the lot inventory was received.

Inventory tab details - by lot

Material:	The common lookup code for the material or product.
Lot:	The lot ID of the inventory.
Material name:	The alternative identifier for the material or product.
Material description:	The description of the material or product.
Total amount:	The total amount of inventory for the material in the warehouse regardless of status.
Available amount:	The amount of inventory for the material that is available for allocation.
Packaging:	The packaging UOM of the material inventory.
Warehouse:	The warehouse in which the inventory is located.
Project:	The name of the project associated with the material inventory.
Vendor lot:	The vendor lot ID of the inventory.
Gross weight:	The total weight of the inventory for the lot, including the packaging, in the warehouse.
Weight UOM:	Unit of measurement for weight. Options include kilogram, gram, pound, ounce, ton, troy ounce, and metric ton.
Receiving order:	Incoming order the lot first came in on.
Expiration Date:	The expiration date of the lot's inventory.
Manufacture Date:	The manufacture date of the lot's inventory.

Received Date: The date the lot inventory was received.

Inventory tab details - by material

Material: The common lookup code for the material or product.

Material name: The alternative identifier for the material or product.

Material description: The description of the material or product.

Total amount: The total amount of inventory for the material in the warehouse regardless of status.

Available amount: The amount of inventory for the material that is available for allocation.

Incoming amount: The amount of inventory that is on order, but not yet received.

Packaging: The packaging UOM of the material inventory.

Warehouse: The warehouse in which the inventory is located.

Project: The name of the project associated with the material inventory.

Gross weight: The total weight of the material, including the packaging, in the warehouse.

Weight UOM: Unit of measurement for weight. Options include kilogram, gram, pound, ounce, ton, troy ounce, and metric ton.

Materials tab

The **Materials** tab lists all your project's materials, in ascending alpha-numeric order. Basic information about the materials is displayed. If a material has multiple levels of packaging, such as "boxes" and "cases" each level will be a separate line in the grid. Selecting a **material record** will open it so you can review and manage its details.

Inventory **Materials** Activity 6 items

Export

<

Materials tab details

Material: The name of the material.

UPC: The Universal Product Code, for the level of packaging detailed in

	the line.
Packaging:	The packaging level for the material inventory displayed in the line.
Sub-packaging:	The sub-packaging of the line's packaging, if any.
Sub-packaging quantity:	The amount of the sub-packaging inside the line's packaging, if any.
Status:	The current status of the material.
Length:	The length of the material in the line's level of packaging. Only applicable if the material has Fixed dimensions .
Width:	The width of the material in the line's level of packaging. Only applicable if the material has Fixed dimensions .
Height:	The height of the material in the line's level of packaging. Only applicable if the material has Fixed dimensions .
Shipping weight:	Weight of the items in line's package, combined with the weight of the package itself (tare weight). Only applicable if the material is Fixed weight .
Volume:	The volume of the line's level of packaging. Only applicable when the material is Fixed volume .
Shipping volume:	Volume of the line's packaging if it varies when shipping. Only applicable when the material is Fixed volume .
Pallet high:	The number of this units of this level of packaging that can be stacked atop each other.
Pallet tie:	The number of this units of this level of packaging to be placed per level on a pallet before you begin stacking atop them.
Group:	The grouping of similar materials the material is assigned to.
Allocation strategy:	The criteria by which inventory for this material is selected for a shipping order.
Lot controlled:	Indicates whether or not the Material is Lot Tracked, or Controlled.
Serial controlled:	Indicates whether or not the Material is Serial Tracked, or Controlled.
Fixed weight:	Indicates whether or not the Material Weight is always fixed.
Fixed volume:	Indicates whether or not the Material Volume is always fixed.
Fixed dimensions:	Indicates whether or not the Material Dimensions are always fixed.
Shelf Life:	The number of days the Material should be kept in the warehouse for. For a Lot Controlled Material, the Shelf Life is added to the Manufacture Date, and an Expiration Date is automatically created.
Description:	A short description of what the Material is.
Owner:	The material's owner.
Project:	The project under which this material is classified.

Materials tab toolbar

Export: Allows users to **export data** displayed in the grid.

Activity tab

The **Activity** tab displays the inventory's activity history.

Inventory Materials <u>Activity</u>												
49 items												
ID	Warehouse	Operation code	Status	Material	Lot	Project	Serial number	Expected	Actual	Created date	Completed date	Actual source pallet
983032	Sara-Demo Warehouse	Inventory Adjustment	Completed	SPAT01 LOT	3881	SPhatic		24 EA	-4 EA	08/25/2025	08/25/2025	SPLP090425_001
982993	Sara-Demo Warehouse	Picking	Completed	SPAT01 LOT	3881	SPhatic		1 EA	1 EA	08/24/2025	08/24/2025	SPLP090425_001
981559	Sara-Demo Warehouse	Receiving	Completed	SPAT01 LOT	04032025	SPhatic		25 EA	25 EA	08/04/2025	08/04/2025	SPLP090425_002
981556	Sara-Demo Warehouse	Receiving	Completed	SPAT01 LOT	04032025	SPhatic		50 EA	25 EA	08/04/2025	08/04/2025	SPLP090425_001
981001	Sara-Demo Warehouse	Receiving	Completed	SPAT01 LOT	04032025	SPhatic		50 Box	50 Box	08/26/2025	08/26/2025	LSP090625_001

Activity tab details

- ID:** A system-generated field containing the system's unique ID for this particular activity.
- Warehouse:** A system-generated field containing the warehouse where the activity for the inventory took place.
- Operation code:** The activity's operation code identifying what kind of activity this is.
- Status:** The status of the activity.
- Material:** The lookup code of the inventory's material in the activity.
- Lot:** The lot assigned to the material inventory in the activity.
- Project:** The name of the project associated with the material inventory involved in the activity.
- Serial number:** If applicable, the serial number associated with the inventory involved in the activity.
- Expected:** The expected amount of inventory and packaging associated with the activity's task.
- Actual:** The actual amount of inventory and packaging associated with the activity's task.
- Created date:** The date and time the activity was created, likely, but not always, when it started.
- Completed date:** The date and time the activity was finished.
- Actual source pallet:** The actual pallet inventory began on for the activity.
- Actual target pallet:** The actual pallet inventory ended on for the activity.

Notes: Any notes entered for the inventory activity.

Materials Hub > Project SPatric

+ Create material

Email rules

Project SPatric - Status Active

Inventory type

By Pallet

By Lot

By Material

Ship to contacts

Ship from contacts

Total materials

4

Total quantity

2.6K

Total weight

1.2K

Inventory

Materials

Activity

9 items

Export

Filter

Material	Material name	Material description	Total amount	Available amount	Incoming amount	Packaging	Warehouse	Project	Gross weight	Weight UOM
SPAT01-LOT	SPAT01-LOT	SPAT01-LOT	740	420	0	EA	Datex Dry	SPatric	335.658354	kg
SPAT01-LOT	SPAT01-LOT	SPAT01-LOT	5	5	0	Case	Datex Cold	SPatric	2.267962	kg
SPAT01-LOT	SPAT01-LOT	SPAT01-LOT	96	70	0	EA	Sara-Demo Warehouse	SPatric	43.544868	kg
SPAT02	SPAT02	SPAT02	250	250	0	EA	Datex Dry	SPatric	113.398093	kg
SPAT02	SPAT02	SPAT02	500	450	0	EA	Datex Cold	SPatric	226.796185	kg
SPAT03-LOT	SPAT03-LOT	SPAT03-LOT	740	470	0	EA	Datex Dry	SPatric	335.658354	kg
SPAT03-LOT	SPAT03-LOT	SPAT03-LOT	200	100	0	EA	Sara-Demo Warehouse	SPatric	90.718474	kg
SPAT03-LOT	SPAT03-LOT	SPAT03-LOT	96	83	0	Box	Sara-Demo Warehouse	SPatric	80.013694	kg
SPKIT	SPKIT	SP Kit	15	0	0	EA	Datex Dry	SPatric	6.803886	kg

Shipping Contacts

Shipping contacts are stored at the project level and divided between Ship to contacts (customers) and Ship from contacts (vendors). They can be selected during order creation instead of needing to enter the address every time. From the **Project hub**, you can create, import, export, and manage contacts that will directly associate with your project.

Address window

When opening either the Ship from or the Ship to contacts an Addresses window will open with same fields and options for **creating and editing contacts**.

Address details

Type:	The nature of the contact, for example shipping and billing contacts.
Account:	If the contact is part of a larger organization, its lookup code can be input here
Account name:	If the contact is part of a larger organization, its name can be input here
Reference code:	A lookup code for the contact itself.
First name:	The contact's first name.
Last name:	The contact's last name.
Line 1:	The first address line for the contact.
Line 2:	The second additional line for the contact's address.
City:	The city of the contact's address.
State:	The state of the contact's address.
Postal code:	The zip code for the contact's address.
Country:	The country of the contact's address.
Attention of:	If there is a specific individual that should be items sent to this address other than the contact, they'll be identified here.
Phone:	The contact's phone number.
Email:	The contact's email address.
Notes:	Any notes on the contact.
Errors:	If the contact is imported any errors that occur during the import will be visible here.

***Those in red are required fields.**

Address toolbar button

Delete:	Delete the contact if it isn't associated with an order.
Import:	Import contacts using the Footprint Portal template.
Export:	Download the Footprint Portal contact template.

Delete

Import

Export

Filter

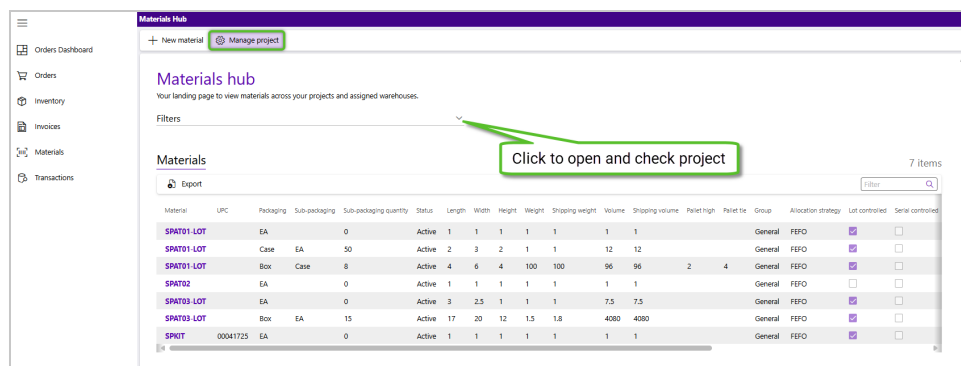
☐	Type *	Account	Account name	Reference code	First name *	Last name *	Line 1 *	Line 2	City	State	Postal code	Country	Attention of	Phone	Email	Notes	Error
	Commercial	AC9901	V0001		Jane	Prentis	900 Spider Lane		Milwa	WI	99001	United States					

Create and manage shipping contacts

Shipping contact addresses can be stored for use in orders in virtual contact books for repeat use in orders. They are divided between **Ship From** (Vendors) and **Ship To** (Customer) Contacts. On the **Projects hub** you can create, edit and delete these contacts.

Access your project record

1. From the **Materials hub**, click the down arrow to the right of the **Filters** header to open the section and ensure the **Project** is set to the project you wish to manage contacts for. Then click the **Manage project** button.



The screenshot shows the 'Materials hub' interface. At the top, there is a '+ New material' button and a 'Manage project' button. Below this is the 'Materials hub' header and a sub-header 'Your landing page to view materials across your projects and assigned warehouses.' A 'Filters' section is visible with a dropdown arrow. A callout box points to this arrow with the text 'Click to open and check project'. Below the filters is a table of materials. The table has columns for Material, UPC, Packaging, Sub-packaging, Sub-packaging quantity, Status, Length, Width, Height, Weight, Shipping weight, Volume, Shipping volume, Pallet high, Pallet tie, Group, Allocation strategy, Lot controlled, and Serial controlled. The table contains 7 items.

Material	UPC	Packaging	Sub-packaging	Sub-packaging quantity	Status	Length	Width	Height	Weight	Shipping weight	Volume	Shipping volume	Pallet high	Pallet tie	Group	Allocation strategy	Lot controlled	Serial controlled
SPAT01 LOT		EA		0	Active	1	1	1	1	1	1	1			General	FEFO	☒	☐
SPAT01 LOT		Case	EA	50	Active	2	3	2	1	1	12	12			General	FEFO	☒	☐
SPAT01 LOT		Box	Case	8	Active	4	6	4	100	100	96	96	2	4	General	FEFO	☒	☐
SPAT02		EA		0	Active	1	1	1	1	1	1	1			General	FEFO	☐	☐
SPAT03 LOT		EA		0	Active	3	2.5	1	1	1	7.5	7.5			General	FEFO	☒	☐
SPAT03 LOT		Box	EA	15	Active	17	20	12	1.5	1.8	4080	4080			General	FEFO	☒	☐
SPAT07	00041725	EA		0	Active	1	1	1	1	1	1	1			General	FEFO	☒	☐

Add Ship from contact

1. Click the **Ship from contacts** button.

Materials Hub > Project SPatric

+ Create material Email rules

Project SPatric - Status Active

Inventory type

By Pallet By Lot **By Material**

Ship to contacts

Ship from contacts

Inventory Materials Activity

Export

Material	Material name	Material description	Total amount	Available amount	Incoming amount
SPAT01-LOT	SPAT01-LOT	SPAT01-LOT	740	420	0
SPAT01-LOT	SPAT01-LOT	SPAT01-LOT	5	5	0
SPAT01-LOT	SPAT01-LOT	SPAT01-LOT	96	70	0
SPAT02	SPAT02	SPAT02	250	250	0
SPAT02	SPAT02	SPAT02	500	450	0

2. In the Addresses window, click the **+ Add row** button.
3. Enter the new contact's address details, (**Type**, **First name**, **Last name**, and **Line 1** are the only required fields), then click the check mark at the end of the row to save.

Addresses

Delete Import Export

1 item

Filter

Type *	Account	Account name	Reference code	First name *	Last name *	Line 1 *	Line 2	City	State	Postal code	Country	Attention of	Phone	Email	Notes	Error
Commercial	AC9901	V-Vendor		Jane	Prentis	900 Spider Lane		Milwaukee	WI	99001	United States					
Shipping	SA990	Ship Ship		Norman	Baily	8500										

+ Add row

The address will now be associated with your project and can be selected when creating receiving orders.

Repeat the process to add as many Ship from contacts as needed.

Add Ship to contact

1. Click the **Ship to contacts** button in the hub toolbar.

Materials Hub > Project SPatric

+ Create material Email rules

Project SPatric - Status Active

Inventory type

By Pallet By Lot **By Material**

Ship to contacts

Ship from contacts

Inventory Materials Activity

Export

Material	Material name	Material description	Total amount	Available amount	Incoming amount
SPAT01-LOT	SPAT01-LOT	SPAT01-LOT	740	420	0
SPAT01-LOT	SPAT01-LOT	SPAT01-LOT	5	5	0
SPAT01-LOT	SPAT01-LOT	SPAT01-LOT	96	70	0

2. In the Addresses window, click the **+ Add row** button.
3. Enter the new contact's address details, (**Type**, **First name**, **Last name**, and **Line 1** are the only required fields), then click the check mark at the end of the row to save.

Addresses

Delete Import Export

1 item

Filter

Type *	Account	Account name	Reference code	First name *	Last name *	Line 1 *	Line 2	City	State	Postal code	Country	Attention of	Phone	Email	Notes	Error
Commercial	AC9901	V-Vendor		Jane	Prentis	900 Spider Lane		Milwa	WI	99001	United States					
Shipping	SA990	Ship Ship		Norman	Baily	8500										

Add row

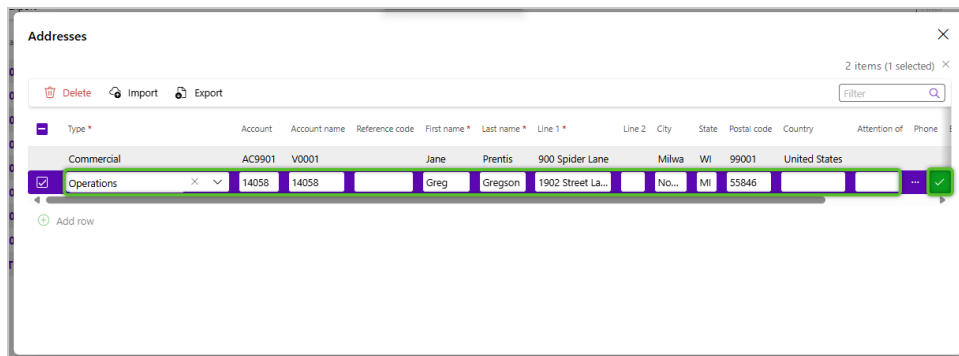
The address will now be associated with your project and can be selected when creating shipping orders.

Repeat the process to add as many Ship to contacts as needed.

Edit a contact

1. To edit a contact, open the Addresses window by clicking either the **Ship to contacts** or **Ship from contacts** button in the project record (depending on the contact to be edited).

2. Locate the contact's row and click the field to be edited. After clicking in the field the contents of the field should be editable and you can make updates.



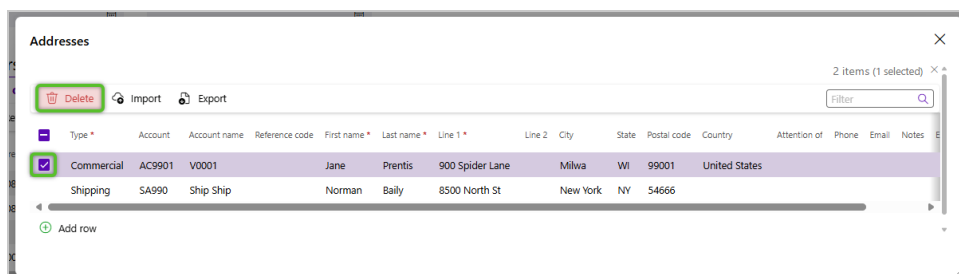
3. Once you have completed all your edits, make sure to confirm the change by clicking the check mark at the end of the row.

Repeat the process for any additional edits needed in other rows. Once all edits are done, close the address window by clicking the "X" button.

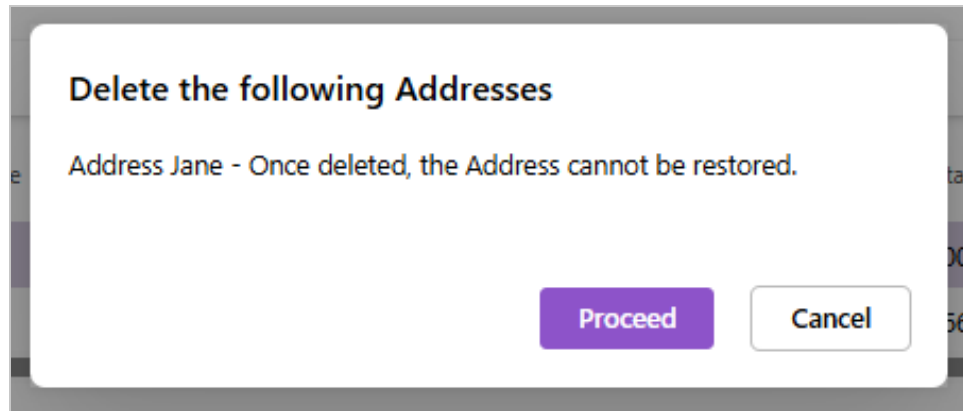
Delete a contact

1. To remove a contact, open the Addresses window by clicking either the **Ship to contacts** or **Ship from contacts** button in the project record (depending on the contact to be deleted). It may not be possible to delete the contact if it's been used in an order.

2. Check the box for the contact row, then click the **Delete** option.



3. Verify you want to proceed with deleting the contact by clicking **Proceed**. Remember, this is not a reversible action.



Portal Reports hub guide

Sections

- [Overview](#)
- [Reports hub](#)
- [Auto-email rules](#)

Overview

The **Reports hub** is where you can review reports, manage subscriptions and access auto-email rules. While auto-email rules can be configured elsewhere on the Footprint Portal, the **Reports hub** offers a chance to see all your rules together and review their history.

Please note, with Footprint Portal there may be additional options available for report configuration with different levels of management permissions. This guide will only focus on the baseline functionality without management permissions.

Reports hub

The **Reports hub** provides a listing of all reports available to you on Footprint Portal. Each report available to you has its own card. From a report's card you can open a preview of the report that can be exported or set up a subscription to the report.

There is only one button in the hub toolbar that leads to the **Auto-email rules** hub. For more details on the Auto-email rules hub, please see [Auto-email rules guide](#).

Available reports are divided between six different tabs, **Inbound**, **Outbound**, **Billing**, **Inventory**, **Operations**, and **Labor**. Please note what reports are available to you will vary.

Reports

 Auto-email

Reports

View and manage your reports.

Inbound Outbound Billing Inventory Operations Labor

Load Slip

Load Slip report.

 Subscribe

Pick Slip

Pick Slip Report

 Subscribe

Pick Slip

Pick Slip Report

 Subscribe

Create report subscription details

Clicking on the Subscribe button of a report card will open the **Create a report subscription** flyout.

Create report subscription

Save

Discard

Enabled

Every month on the 1 at 06:00 AM (-05:00) - Eastern Standard Time (EST)

Edit report parameters

Recipients

To *

Demo@datexcorp.com

CC

BCC

Content

Subject *

Monthly Inventory Report

Body

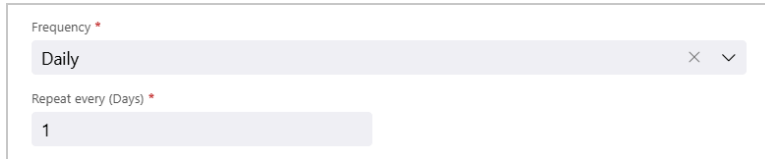
Please see attached for this month's inventory report.

Scheduling details

Report subscriptions run on a set schedule that must be selected during creation. There are three major frequency types - Daily, Weekly, and Monthly.

Daily

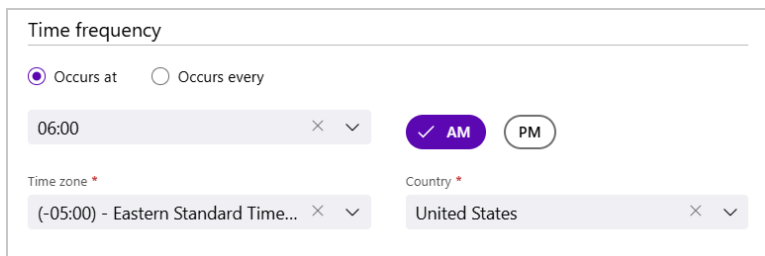
Set the frequency in days a report is sent. For example, a daily report would be set to repeat every "1" days.

A screenshot of a form titled "Frequency". It contains a dropdown menu labeled "Frequency" with "Daily" selected. Below it is a text input field labeled "Repeat every (Days)" with the value "1".

Repeat every (Days): The number of days that will pass before a report subscription will be triggered and sent out.

Choose between the two daily frequency settings - **Occurs at** or **Occurs every**. **Occurs at** will allow you to set a specific time on the triggered day cadence to send out the report (For example every two dates at 0600 AM Eastern Standard Time. **Occurs every** allows you to set up a report to potentially send multiple times a day as it includes additional minute or hour frequencies.

Time frequency: Occurs at settings

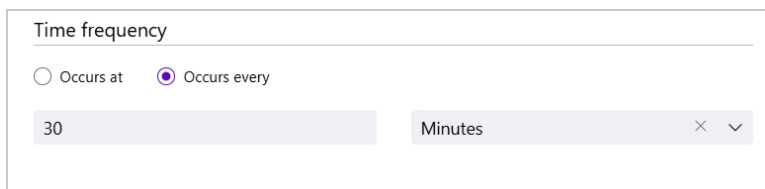
A screenshot of a form titled "Time frequency". It has two radio buttons: "Occurs at" (selected) and "Occurs every". Below the radio buttons is a time input field showing "06:00" and a dropdown for "AM" (selected) and "PM". Below the time field is a "Time zone" dropdown showing "(-05:00) - Eastern Standard Time..." and a "Country" dropdown showing "United States".

Time: The time the report will be triggered to be sent out.

Time zone: The time zone the selected time will be under.

Country: The country that contains the time zone. It is recommended to select this field before setting the time zone to reduce the number of time zone options to just those in the selected country.

Time frequency: Occur every settings

A screenshot of a form titled "Time frequency". It has two radio buttons: "Occurs at" and "Occurs every" (selected). Below the radio buttons is a text input field showing "30" and a dropdown menu showing "Minutes".

Time amount: The amount of time before the report will be triggered and sent out.

Time measure: The time measure, minutes or hours, for the time amount.

measure:

Weekly

You will need to select the specific day(s) of the week the subscription will be sent out. Multiple days can be selected.

The screenshot shows a form for selecting the frequency of reports. The 'Frequency' dropdown is set to 'Weekly'. Below it, the 'Days of week' section has seven buttons: Sunday, Monday, Tuesday, Wednesday, Thursday, Friday (which is selected with a checkmark), and Saturday.

Days of week: The day(s) of the week the report will be triggered and sent out.

Time frequency settings for selected day(s)

The screenshot shows a form for setting time frequency. The 'Time frequency' dropdown is set to '06:00'. Below it, the 'Time zone' dropdown is set to '(-05:00) - Eastern Standard Time...'. To the right, the 'Country' dropdown is set to 'United States'. There are also buttons for 'AM' (selected) and 'PM'.

Time: The time the report will be triggered to be sent out.

Time zone: The time zone the selected time will be under.

Country: The country that contains the time zone. It is recommended to select this field before setting the time zone to reduce the number of time zone options to just those in the selected country.

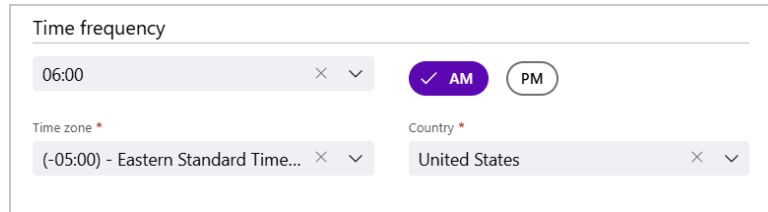
Monthly

You will need to select the specific date(s) of the month the report will trigger on. Multiple days can be selected.

The screenshot shows a form for selecting the frequency of reports. The 'Frequency' dropdown is set to 'Monthly'. Below it, the 'Days of month' dropdown is set to '1'.

Days of month: The date(s) of the month the report will be triggered and sent out.

Time frequency settings for selected date(s)

A screenshot of a web form titled "Time frequency". It contains four input fields: a time field with "06:00" and a dropdown arrow, an AM/PM selector with "AM" selected (indicated by a checkmark), a time zone field with "(-05:00) - Eastern Standard Time..." and a dropdown arrow, and a country field with "United States" and a dropdown arrow. The AM/PM selector has "AM" in a purple circle and "PM" in a white circle. The time zone and country fields have a red asterisk next to their labels.

Time: The time the report will be triggered to be sent out.

Time zone: The time zone the selected time will be under.

Country: The country that contains the time zone. It is recommended to select this field before setting the time zone to reduce the number of time zone options to just those in the selected country.

Parameter details

Report parameters vary from report to report with the exception of the option to select a file type. Additionally, it should be noted some reports will have required parameters that can be identified by the presence of a red asterisk.

File type: The format the report will be emailed in. Current options are **Excel**, **PDF**, **HTML**, and **CSV**.

Recipients details

For all recipient fields multiple email addresses can be entered. Different addresses can be divided by a comma, semi-colon, space, or new line.

To: The email address(es) of the primary individual(s) that will receive the report, this does not have to be the person creating the subscription.

CC: The email address(es) of the individual(s) to be CCed or carbon-copied on the email containing the report. Any address(es) entered here will be visible to all recipients.

BCC: The email address(es) of the individual(s) to be BCCed or blind copied on the email containing the report. Any address(es) entered here will not be visible to all recipients.

***Those in red are required fields.**

Content details

Subject: A system-generated field containing the system's unique ID for this particular activity.

Body: A system-generated field containing the warehouse where the activity for the inventory took place.

***Those in red are required fields.**

Related Tutorials

Tutorials related to auto-email rules are:

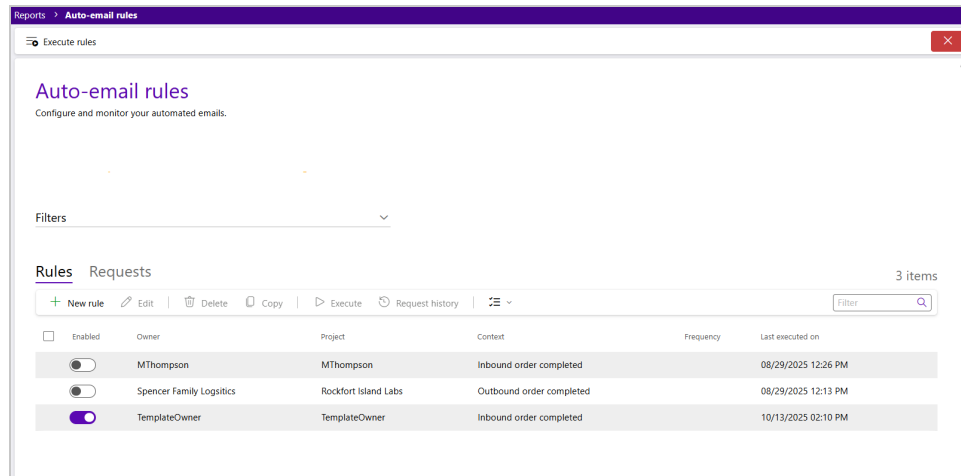
- [How to subscribe to report](#)
- [How to preview and export a report](#)

Auto-email rules

While auto-email rules can be set up and managed at the project level, and the request history at the order level, the **Auto-email rules hub** provides a single view of both, along with some additional management options.

Rules can be filtered by **Owner**, **Project**, and **Context** (rule trigger, for example outbound order completion).

The only button in the Auto-email rules hub is the **Execute rules** button which runs all enabled rules at once regardless of their trigger.



Rules tab

The Rules tab displays all rules available to you, regardless of whether or not they are active, and a variety of ways to manage them.

Rules

Requests

3 items

New rule

Edit

Delete

Copy

Execute

Request history

Filter

☐	Enabled	Owner	Project	Context	Frequency	Last executed on
☐		MThompson	MThompson	Inbound order completed		08/29/2025 12:26 PM
☐		Spencer Family Logistics	Rockfort Island Labs	Outbound order completed		08/29/2025 12:13 PM
☒		TemplateOwner	TemplateOwner	Inbound order completed		10/13/2025 02:10 PM

Rules tab details

Enabled:	This toggle indicates whether or not a rule is currently active and running.
Owner:	The owner the rule applied to.
Project:	The project the rule is applied to.
Context:	The trigger point for the rule, for example, an outbound order completing.
Frequency:	This field only applies to rules with Schedule triggers and shows when and how often the rule occurs.
Last executed on:	The last time the rule was triggered and an email was sent out.

Rules tab buttons

New rule:	Create a new auto-email rule.
Edit:	Edit a selected auto-email rule.
Delete:	Delete a selected auto-email rule.
Copy:	Copy a selected auto-email rule.
Execute:	Run a selected auto-email rule outside of a schedule or trigger.
Request history:	Open the request history for an auto-email rule.

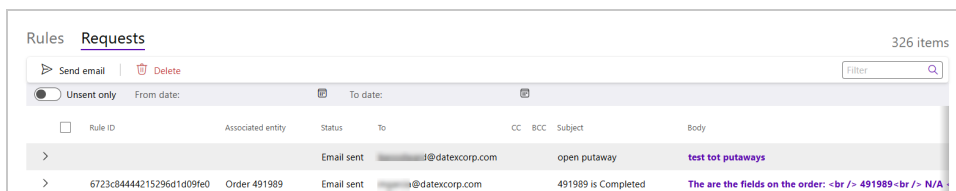
Related Tutorials

Tutorials related to auto-email rules are:

- [How to create an auto-email rule](#)
- [How to manage auto-email rules](#)
- [How to resend a previously sent auto-email](#)

Requests tab

The Rules tab displays all rules available to you, regardless of whether or not they are active, and a variety of ways to manage them.



Request tab details

Right arrow button	Click the right arrow button to open the child row to the current row and review the attached files in the request.
Rule ID:	The system-generated ID for the rule utilized in the request.
Associated entity:	If the request's rule had a trigger dependent on another entity's action, such as an order completing, it will be displayed here.
Status:	The status of the request.
To:	The email address(es) of the recipients the request email was sent to.
CC:	The email address(es) of the recipients copied on the request email.
BCC:	The email address(es) of the recipients blind copied on the request email.
Subject:	The content of the subject line of the request email.
Body:	The content of the body of the request email sent out.

Request tab buttons

Send email:	Resend a previously sent auto-email.
Delete:	Delete a request.

Related Tutorials

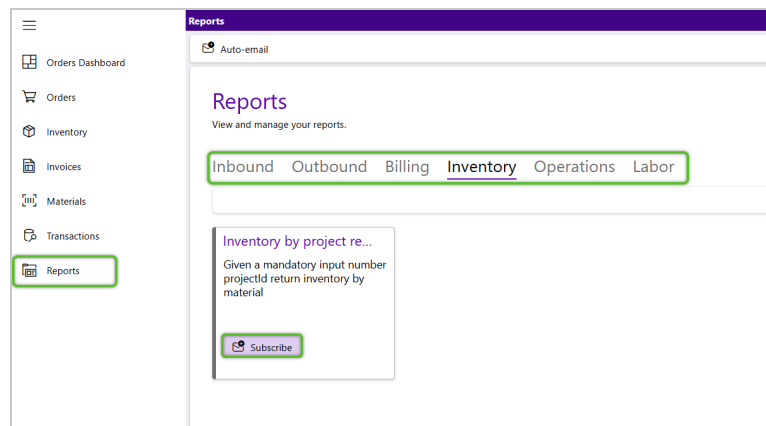
Tutorials related auto-email rule requests are:

- [How to resend a previously sent auto-email](#)

Subscribe to a report

One of the highlights of the Reports hub is the ability to set up a subscription to a report for yourself. You'll be able to control details such as how often the report is sent and its format.

1. Open the **Reports hub** and navigate through the tabs to locate the report you wish to subscribe to.
2. Click the **Subscribe** button to open the subscription flyout for the chosen report.



3. (Optional) If you do not want to use this subscription yet, make sure to toggle off the **Enabled** button. Report subscriptions will default to **Enabled**.

4. Click the **Please enter schedule details** button to open the frequency flyout.

Report subscription: Inventory by project report

Save

Discard

Enabled

Please enter schedule details

Add report parameters

Recipients

To *

Sara Patric

CC

BCC

Content

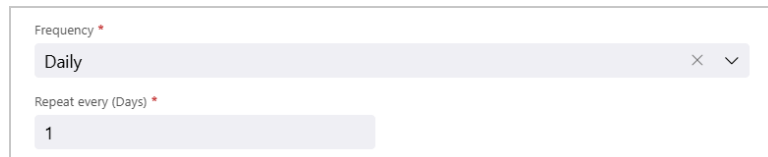
Subject *

Body

5. Select the frequency of the subscription - **Daily**, **Weekly**, or **Monthly** - then configure the specific timing of your choice. For more information on the different frequency options, please reference the [Reports guide](#) or open the relevant drop down below.

Daily

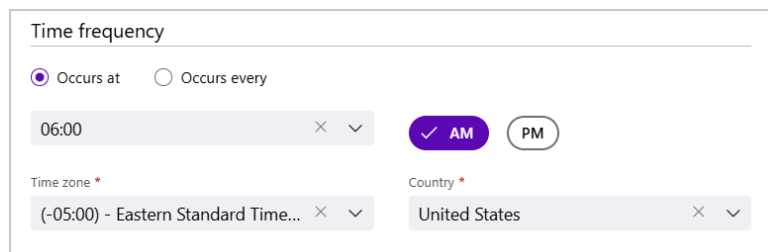
Set the frequency in days a report is sent. For example, a daily report would be set to repeat every "1" days.

A screenshot of a form titled "Frequency". It contains a dropdown menu with "Daily" selected, and a text input field labeled "Repeat every (Days)" with the value "1".

Repeat every (Days): The number of days that will pass before a report subscription will be triggered and sent out.

Choose between the two daily frequency settings - **Occurs at** or **Occurs every**. **Occurs at** will allow you to set a specific time on the triggered day cadence to send out the report (For example every two dates at 0600 AM Eastern Standard Time. **Occurs every** allows you to set up a report to potentially send multiple times a day as it includes additional minute or hour frequencies.

Time frequency: Occurs at settings

A screenshot of a form titled "Time frequency". It has two radio buttons: "Occurs at" (selected) and "Occurs every". Below the radio buttons is a time input field showing "06:00" and a dropdown arrow. To the right of the time field are two buttons: "AM" (selected with a checkmark) and "PM". Below the time field is a "Time zone" dropdown menu showing "(-05:00) - Eastern Standard Time...". To the right of the time zone field is a "Country" dropdown menu showing "United States".

Time: The time the report will be triggered to be sent out.

Time zone: The time zone the selected time will be under.

Country: The country that contains the time zone. It is recommended to select this field before setting the time zone to reduce the number of time zone options to just those in the selected country.

Time frequency: Occur every settings

The screenshot shows a form titled "Time frequency". It has two radio buttons: "Occurs at" (unselected) and "Occurs every" (selected). Below the radio buttons, there is a text input field containing the number "30" and a dropdown menu set to "Minutes".

Time amount: The amount of time before the report will be triggered and sent out.

Time measure: The time measure, minutes or hours, for the time amount.

Weekly

You will need to select the specific day(s) of the week the subscription will be sent out. Multiple days can be selected.

The screenshot shows a form with a "Frequency" dropdown set to "Weekly". Below it, there is a "Days of week" section with seven buttons: "Sunday", "Monday", "Tuesday", "Wednesday", "Thursday", "Friday" (which is selected with a checkmark), and "Saturday".

Days of week: The day(s) of the week the report will be triggered and sent out.

Time frequency settings for selected day(s)

The screenshot shows a form titled "Time frequency". It has a time input field set to "06:00" and a dropdown menu set to "AM". Below this, there is a "Time zone" dropdown set to "(-05:00) - Eastern Standard Time..." and a "Country" dropdown set to "United States".

Time: The time the report will be triggered to be sent out.

Time zone: The time zone the selected time will be under.

Country: The country that contains the time zone. It is recommended to select this field before setting the time zone to reduce the number of time zone options to just those in the selected country.

Monthly

You will need to select the specific date(s) of the month the report will trigger on. Multiple days can be selected.

The screenshot shows two dropdown menus. The first is labeled 'Frequency' with a red asterisk and has 'Monthly' selected. The second is labeled 'Days of month' with a red asterisk and has '1' selected. Both dropdowns have a close button (X) and a dropdown arrow (v).

Days of month: The date(s) of the month the report will be triggered and sent out.

Time frequency settings for selected date(s)

The screenshot shows the 'Time frequency' section. It includes a time dropdown set to '06:00', a radio button selection for 'AM' (which is selected with a checkmark) and 'PM', a 'Time zone' dropdown set to '(-05:00) - Eastern Standard Time...', and a 'Country' dropdown set to 'United States'. All dropdowns have close buttons and arrows.

Time: The time the report will be triggered to be sent out.

Time zone: The time zone the selected time will be under.

Country: The country that contains the time zone. It is recommended to select this field before setting the time zone to reduce the number of time zone options to just those in the selected country.

6. Once all your frequency settings are configured, click the **Confirm** button to return to the subscription flyout.

7. Click the **Add report parameters** button to open the parameter flyout.

Report subscription: Inventory by project report

Save

Discard

Enabled

Please enter schedule details

Add report parameters

Recipients

To *

Sara Patric

CC

BCC

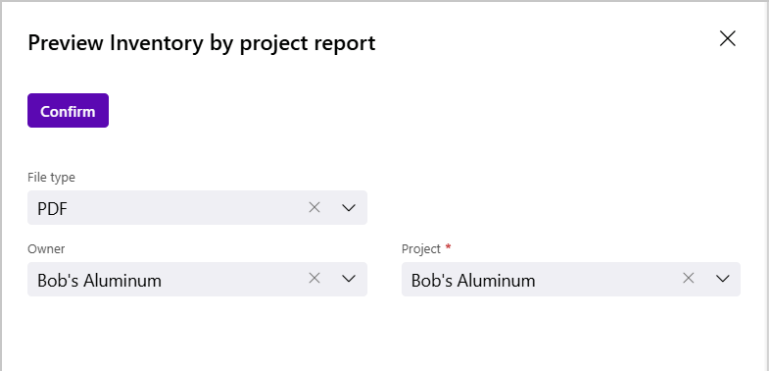
Content

Subject *

Body

8. Depending on the report, parameters will vary, except the **File type** parameter. Use the **File type** field to select the format you want the report to be sent in. Current options are **Excel**, **PDF**, **HTML**, and **CSV**.

Please note for some reports, parameters may be required, while for others they will not. In cases where there are required parameters the **Add report parameters** button will update to indicate there are required parameters after you set a subscription schedule. Additionally, when you open the parameters flyout required fields will be marked with a red asterisk like anywhere else in Footprint Portal. Examples of parameters may include a date range for the report or a specific warehouse to report from.



9. Once all your parameters have been set, if any, click **Confirm**.

10. Enter your, or the recipient's, email address in the **To** field. While a check will occur that the email address entered has all the components that make it a valid email address, it is not checking that it's an accurate email address.

Multiple email addresses can be entered, separated by a comma, space, semi-colon, or a new line.

11. (Optional) If needed, you may click the **CC** or **BCC** buttons to open fields for adding email addresses to be carbon copied or blind carbon copied.

12. In the **Content** section, a **Subject** must be provided for the email. The **Body** for the email is optional.

13. Once you have completed all setup to your satisfaction, click the **Save** button.

Create report subscription

Save

Discard

Enabled

Every month on the 1 at 06:00 AM (-05:00) - Eastern Standard Time (EST)

Edit report parameters

Recipients

To *

Demo@datexcorp.com

CC

BCC

Content

Subject *

Monthly Inventory Report

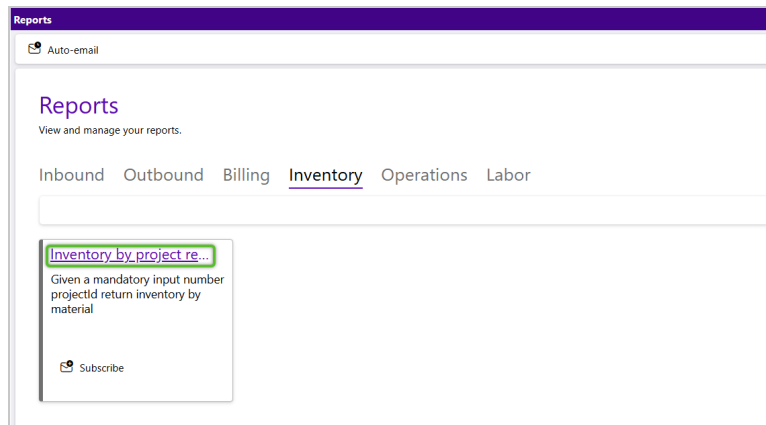
Body

Please see attached for this month's inventory report.

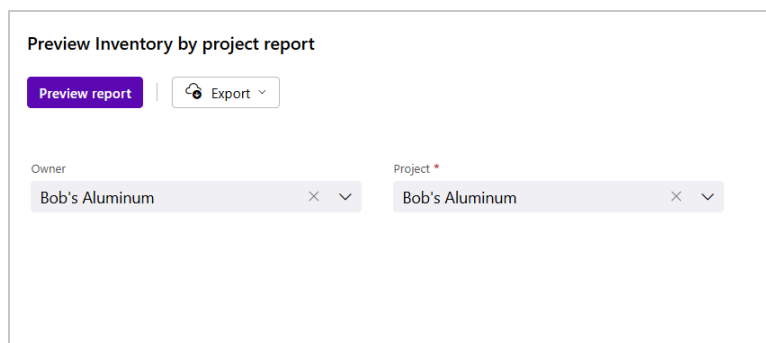
Preview and export a report

From the **Reports hub** you will be able to open reports as a preview before printing or exporting them.

1. From the **Reports hub**, locate the report you wish to preview and click the title hyperlink in the report's card.



2. In the preview window that opens select any required parameters identified with a red asterisk.



3. Click the **Preview report** button and the report preview will load and open in a new window.

From the report preview window you may save or print the report using the buttons provided there.

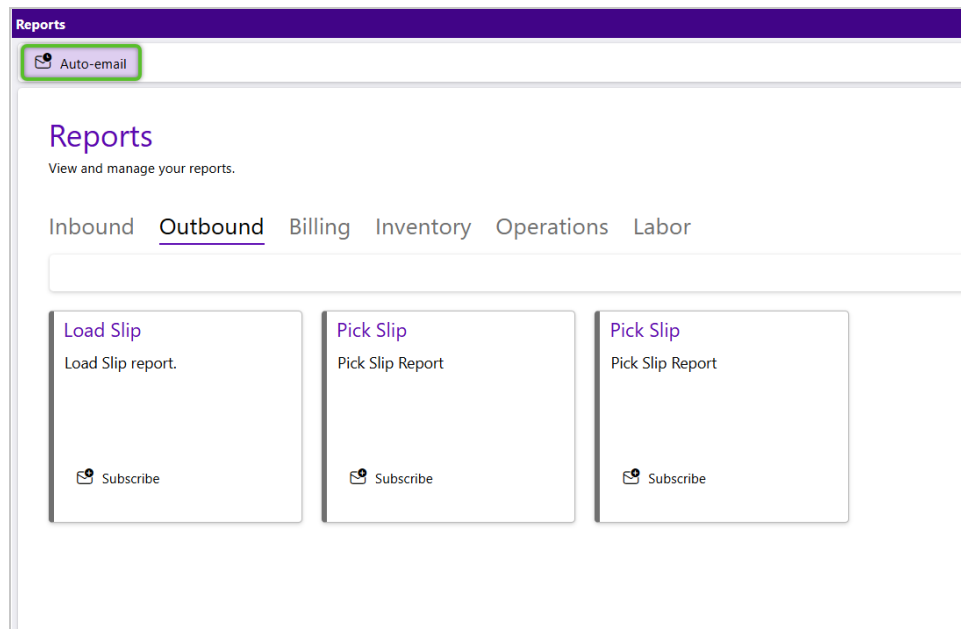
4. If you wish to export the report in one of the supported formats, **Excel**, **PDF**, **HTML**, and **CSV**, click the **Export** button to open the drop down and select the file type to begin an export and generate the file.

Create auto-email rules

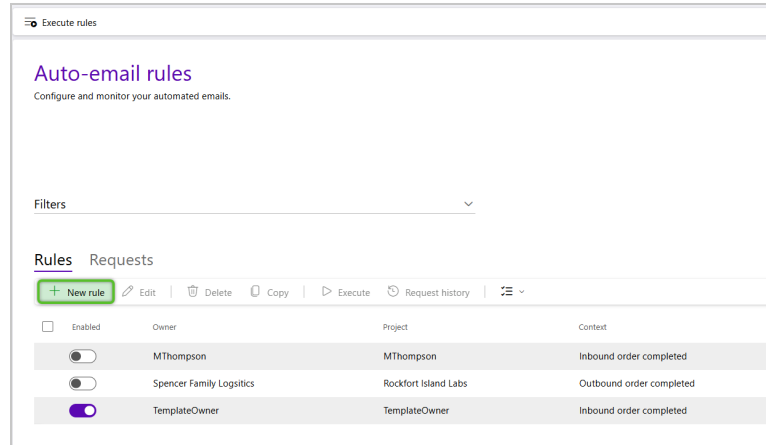
Emails can be set up to trigger automatically from the actions of many entities in Footprint Portal, for example, order completion. Once an auto-email rule is active emails from its request history can be resent if needed.

Access the Auto-email rules hub

1. From the **Reports hub**, click the **Auto-email rule** button.



2. In the Rules tab toolbar, click **+ New rule** button.



Tip

If you already have rules created, to save time, select the Rule and click **Copy**, then update the record as needed.

Materials Hub > Project SPatric > SPatric auto-email rules > Create auto-email rule

Save | Discard | Copy

☒ Enabled

Trigger *

Recipients

To *

CC BCC

Content

{x} Insert parameter

Subject *

Body

Attached reports

2. In the **Email Rules** window, the Enabled toggle will default to on. This is the setting that turns the rule on. If you don't want the rule to be activated, you may toggle the Enabled button off to be manually turned on later.

3. Select the Auto-Email Rule **Trigger**. In most cases this will be the action that sets off the email, such as the closing of an outbound shipping order. It also determines what kind of report can be attached to that email. The outbound shipping order, for example, can have the order's bill of lading sent. Please see below for the different trigger types and any additional options they may have.

Triggers

- **Dock appointment completed** - Email with selected report(s) will be sent when a dock appointment for this project is completed. This can be further refined to only apply to specific carriers or dock appointment types. You may optionally include any attachments added to the dock appointment to the email with the selected report(s).
- **Inbound order completed** - Email with the selected report(s) will be sent when an inbound (receiving) order for this project is completed. You may optionally include any attachments added to the order to the email with the selected report (s).
- **Invoice exported** - Email with the selected report(s) will be sent when an invoice for this project is completed. You may optionally include any attachments added to the invoice to the email with the selected report.
- **Lot expiration** - Email with selected report(s) will be sent at the set number of day(s) before the expiration of a lot for this project.
- **Minimum inventory threshold** - Email with selected report(s) will be sent when inventory for materials in a selected warehouse drop below the set minimum amount.
- **Outbound order completed** - Email with the selected report(s) will be sent when an outbound (shipping) order for this project is completed. You may optionally include any attachments added to the order to the email with the selected report (s).
- **Schedule** - Email with report(s) will be sent at a set recurring time of your choosing. Options include daily, weekly, or monthly.

4. Set any trigger specific options. Depending on the selection they may be required, such as when you're setting the time for a "Schedule" trigger, or optional such as when you're opting to include attachments for a "Outbound order completed" trigger.

5. Enter the recipient's email address in the **To** field. While a check will occur that the email address entered has all the components that make it a valid email address, it is not checking that it's an accurate email address.

Multiple email addresses can be entered, separated by a comma, space, semi-colon, or a new line.

6. (Optional) If needed, you may click the **CC** or **BCC** buttons to open fields for adding email addresses to be carbon copied or blind carbon copied.

7. In the **Content** section, a **Subject** must be provided for the email. The **Body** for the email is optional. Field parameters may be added to both using the **Insert parameters** button. These parameters will add fields based on the associated entity. For example, the "Lookup" parameter for an Order trigger will use that Order's lookup code.

The **Trigger** selected in Step 3, above, determines which fields are available to be inserted into the email.

8. In the **Attached reports** tab, click the green **+ Add row** option to select the report(s) to add to the email. The report can be selected from the **Name** field. The report name can be updated if you like. Click the checkmark at the end of the row to finalize. Repeat as needed for additional reports. Remember, the available reports are determined by the trigger selected in Step 3

9. Once you are complete, click the **Save** button to finalize, and then click the "X" button to close the rule.

The **Trigger** selected in Step 3, above, determines which reports are available to be attached to the email.

Materials Hub > Project SPatric > SPatric auto-email rules > Create auto-email rule

Save | **Discard** | **Copy**

☒ Enabled

Trigger *

Outbound order completed

☒ Include order attachments

Recipients

To *

onlinehelp@datexcorp.com

CC **BCC**

Content

{X} Insert parameter

Subject *

BOL for {LookupCode}

Body

Dear {Addresses.FirstName},

Please see attached for {VendorReference}'s bill of lading and included documentation.

Attached reports

Remove

☐ Name *

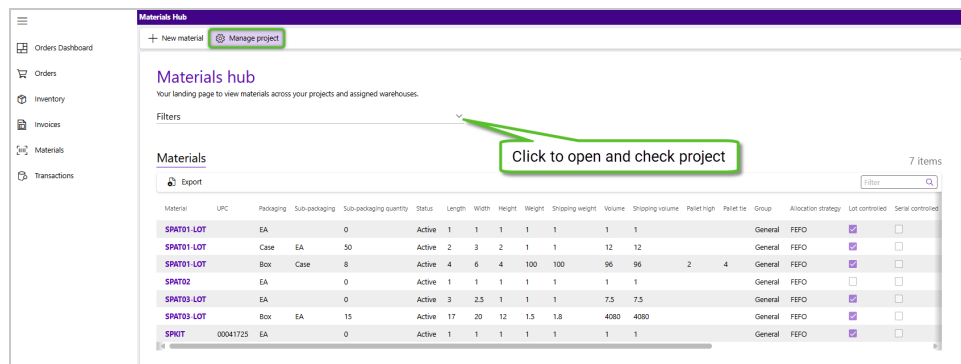
Bill of lading

Manage auto-email rules

After an auto-email rule has been created, multiple actions can still be performed. These can be managed either from the project record the rule is assigned to or from the **Auto-email rules hub**. Regardless the path you take, the available options remain the same.

Access auto-email rules from project record

1. From the **Materials hub**, click the down arrow to the right of the **Filters** header to open the section and ensure the appropriate **Project** is set. Then click the **Manage project** button.



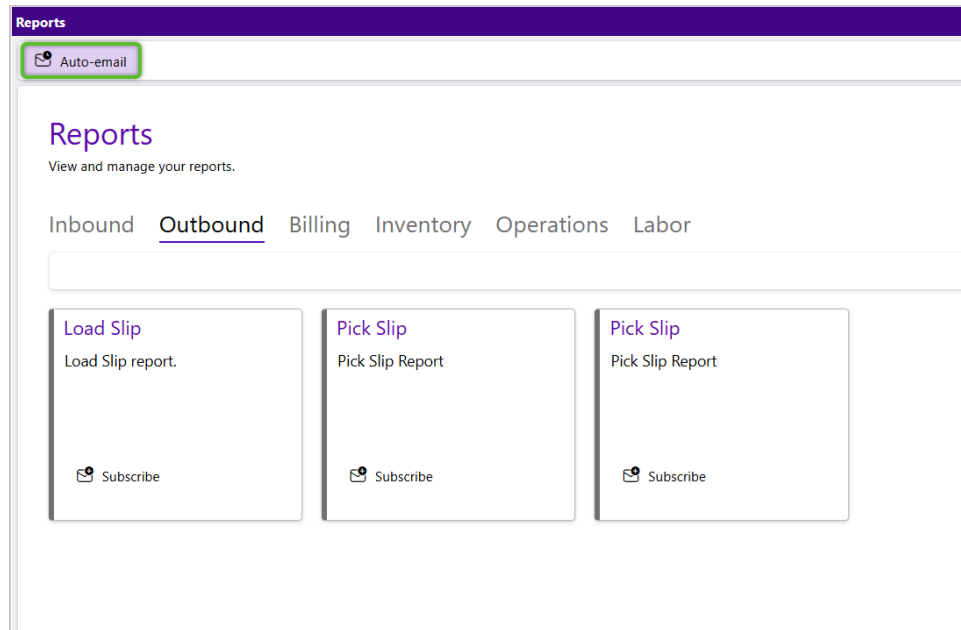
2. Once in the project record, click the Email rules button to view and manage all auto-email rules for the project.

The screenshot shows the 'Project SPatric' interface. At the top, there is a purple header bar with 'Materials Hub > Project SPatric'. Below the header, there is a navigation bar with two buttons: '+ Create material' and 'Email rules'. The 'Email rules' button is highlighted with a green box. Below the navigation bar, the main content area displays 'Project SPatric - Status Active'. Underneath, there is a section for 'Inventory type' with three buttons: 'By Pallet', 'By Lot', and 'By Material' (which is selected and highlighted in purple). Below this, there are two links: 'Ship to contacts' and 'Ship from contacts'. Further down, there are three tabs: 'Inventory', 'Materials', and 'Activity'. The 'Inventory' tab is selected. Below the tabs, there is an 'Export' button. At the bottom, there is a table with six columns: 'Material', 'Material name', 'Material description', 'Total amount', 'Available amount', and 'Incoming amount'. The table contains three rows of data for 'SPAT01-LOT'.

Material	Material name	Material description	Total amount	Available amount	Incoming amount
SPAT01-LOT	SPAT01-LOT	SPAT01-LOT	740	420	0
SPAT01-LOT	SPAT01-LOT	SPAT01-LOT	5	5	0
SPAT01-LOT	SPAT01-LOT	SPAT01-LOT	96	70	0

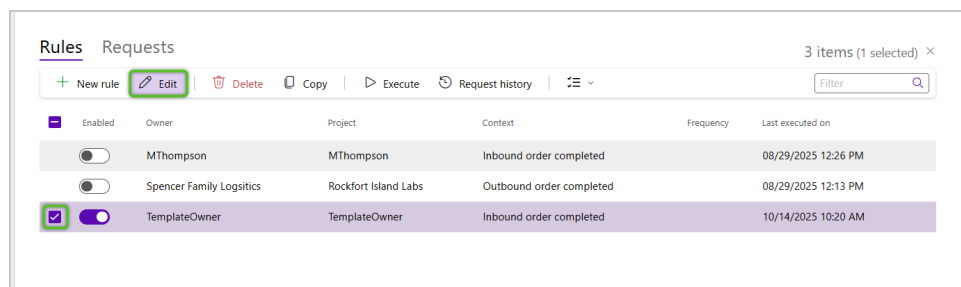
Access auto-email rules from Reports hub

1. From the **Reports hub**, click the **Auto-email** button to open the **Auto-email rules hub**. The view will default to the **Rules** tab where all rules you have access to will be visible.



Edit a rule

1. Locate the rule you're looking for in the grid and hover your mouse over the row until the check box is visible, then check it.



2. Once the row is checked and highlighted, click the **Edit** button.

3. The auto-email rule record will open and changes can be made.

4. Once you've completed your changes click the **Save** button, then the "X" button to close the record.

Reports > Auto-email rules > Edit auto-email rule

Save Cancel Delete Copy Request history

Enabled

Owner: Spencer Family Logistics Project: Rockfort Island Labs

Trigger: Outbound order completed

Include order attachments

Recipients

To: spatric@datexcorp.com

Delete a rule

1. Locate the rule you're looking for in the grid and hover your mouse over the row until the check box is visible, then check it.

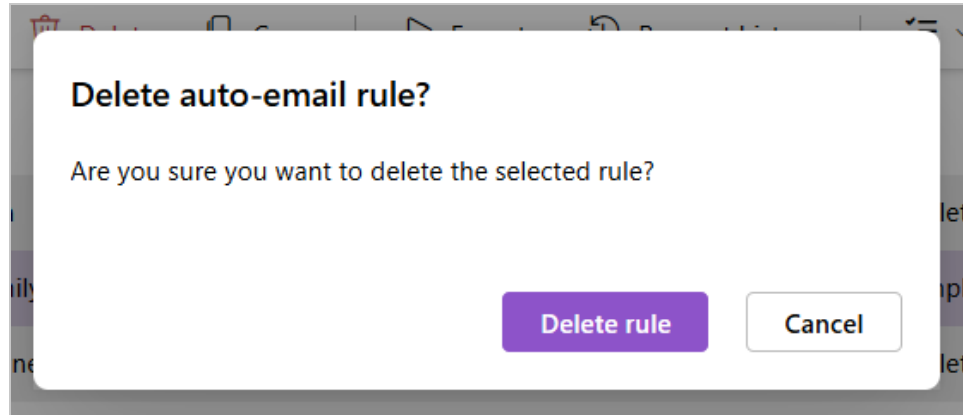
Rules Requests 3 items (1 selected) ×

+ New rule Edit Delete Copy Execute Request history Filter

Enabled	Owner	Project	Context	Frequency	Last executed on
☐	MThompson	MThompson	Inbound order completed		08/29/2025 12:26 PM
☒	Spencer Family Logistics	Rockfort Island Labs	Outbound order completed		08/29/2025 12:13 PM
☐	TemplateOwner	TemplateOwner	Inbound order completed		10/14/2025 10:20 AM

2. Once the row is checked and highlighted, click the **Delete** button. A confirmation window will open.

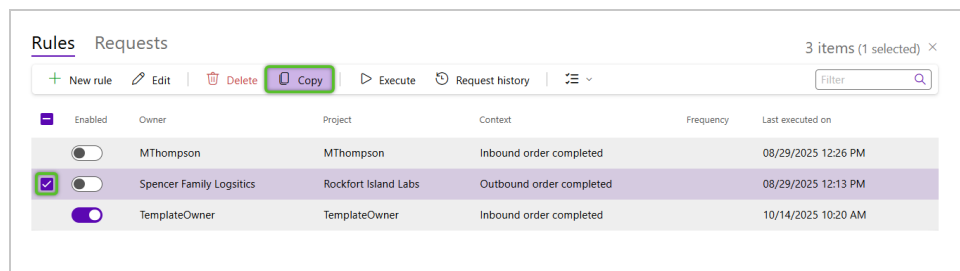
3. In the confirmation window, click **Delete rule** button to proceed.



The rule will be deleted. This is not a reversible action. If you wish to stop using a rule for a while, you can always toggle off the **Enabled** option when editing the rule.

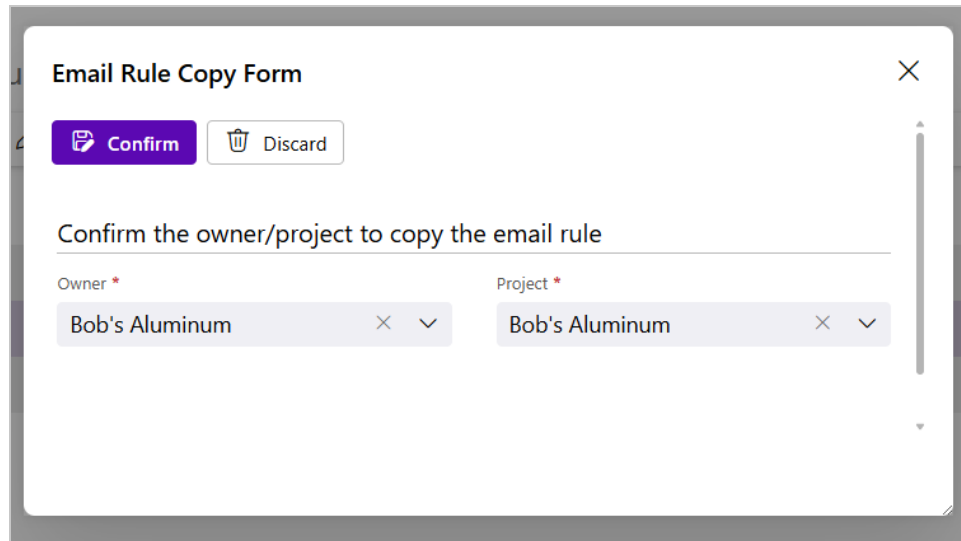
Copy a rule

1. Locate the rule you're looking for in the grid and hover your mouse over the row until the check box is visible, then check it.



2. Once the row is checked and highlighted, click the **Copy** button. A window with a form will open.

3. In the rule copy form, select the target **Owner** and **Project** for the copy. This can be the same as the source if you are using the rule as a base to create a similar rule with minor adjustments.



The screenshot shows a modal window titled "Email Rule Copy Form" with a close button (X) in the top right corner. At the top left of the form are two buttons: a purple "Confirm" button with a floppy disk icon and a white "Discard" button with a trash can icon. Below these buttons is a section header "Confirm the owner/project to copy the email rule". Under this header are two dropdown menus. The first is labeled "Owner *" and the second is labeled "Project *". Both dropdown menus currently display "Bob's Aluminum" and have a small "x" icon to the left of a downward arrow icon, indicating they can be cleared or expanded. The form has a vertical scrollbar on the right side.

4. Once you've selected your target **Owner** and **Project** for the copied rule, click **Confirm**.

The new rule will open automatically. You can make any adjustments you may need before clicking the **Save** button, then closing the rule using the "X" button.

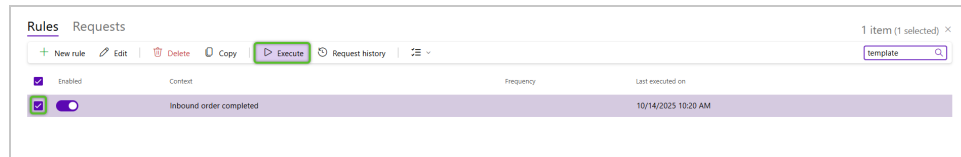
The screenshot shows the configuration interface for an auto-email rule. At the top, there is a toolbar with buttons: Save (purple), Cancel (grey), Delete (red trash icon), Copy (document icon), and Request history (clock icon). Below the toolbar, the rule is configured as follows:

- Enabled:** A toggle switch is turned on.
- Owner:** A dropdown menu showing "Bob's Aluminum" with a close (X) and expand (v) icon.
- Project:** A dropdown menu showing "Bob's Aluminum" with a close (X) and expand (v) icon.
- Trigger:** A dropdown menu showing "Outbound order completed" with a close (X) and expand (v) icon.
- Include order attachments:** A toggle switch is turned on.
- Recipients:**
 - To:** A text field containing "spatric@datexcorp.com".
 - CC:** An empty text field.
 - BCC:** An empty text field.
- Content:**
 - Subject:** A text field containing "BOL for {LookupCode}".
 - Body:** A text field containing "Hello (Project.LookupCode)".
- Attached reports:**
 - A "Remove" button with a minus icon.
 - A table with two columns: "Name" and "File type".

Name	File type
Bill of lading	PDF (selected with a checkmark), Excel, HTML, CSV

Execute a rule

1. To manually execute a rule outside its usual trigger conditions or schedule, locate the rule in the grid, hover over the row until the check box is visible, and then select it.



2. Once the row is checked and highlighted, click the **Execute** button.

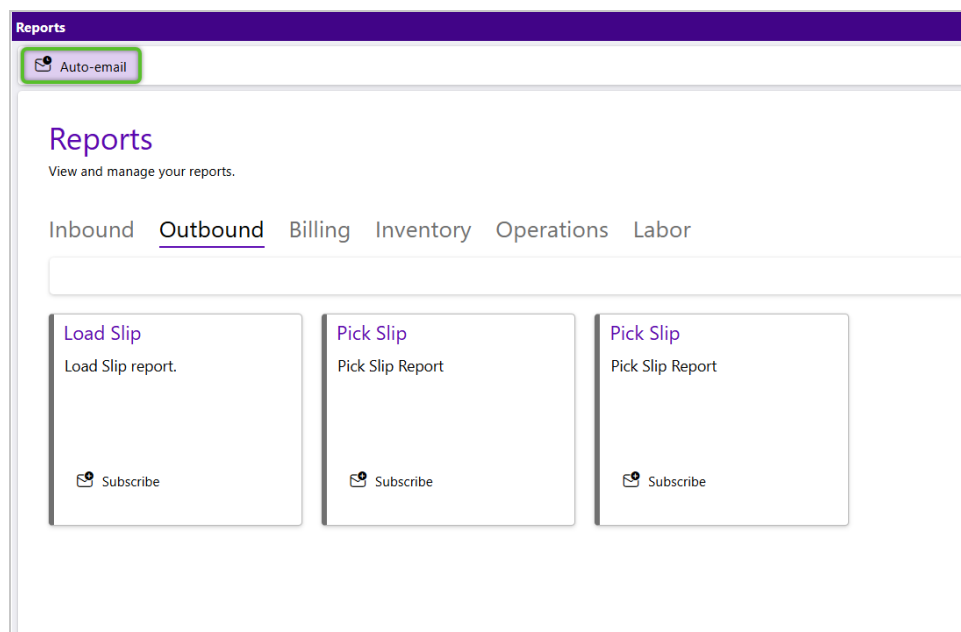
The rule will execute and a notification will display to let you know when it is complete. The notification will close on its own.

View and resend auto-emails

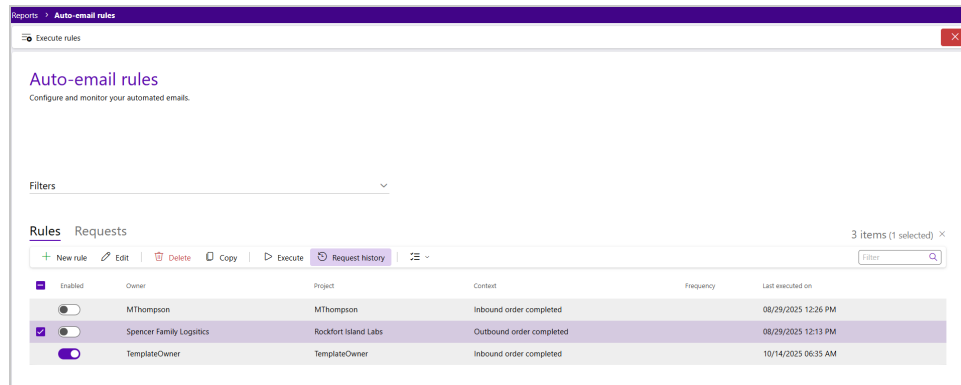
Emails can be **set up to send automatically** using multiple entities in Footprint Portal as a trigger, for example, completing a dock appointment. Sent emails can be viewed and resent from several locations on Footprint Portal following a similar process.

Open request history from the Rules tab of the Auto-email rules hub

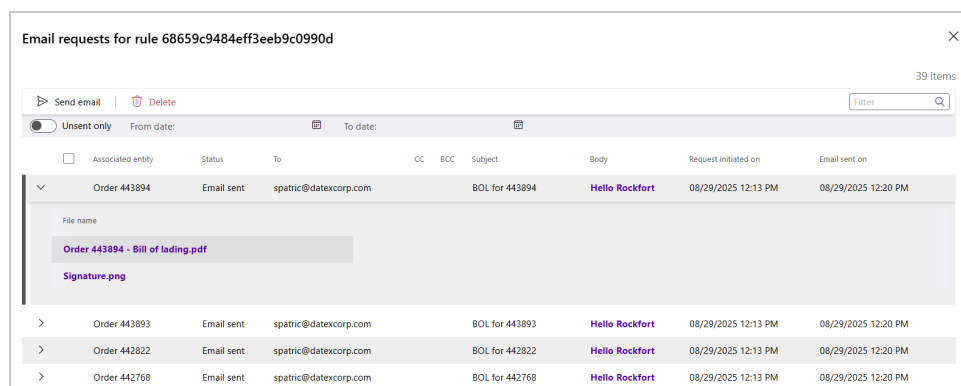
1. From the **Reports hub**, click the **Auto-email rule** button.



2. In the **Rules** tab, locate the rule in the grid, hover over the row until the checkbox is visible, then select it.

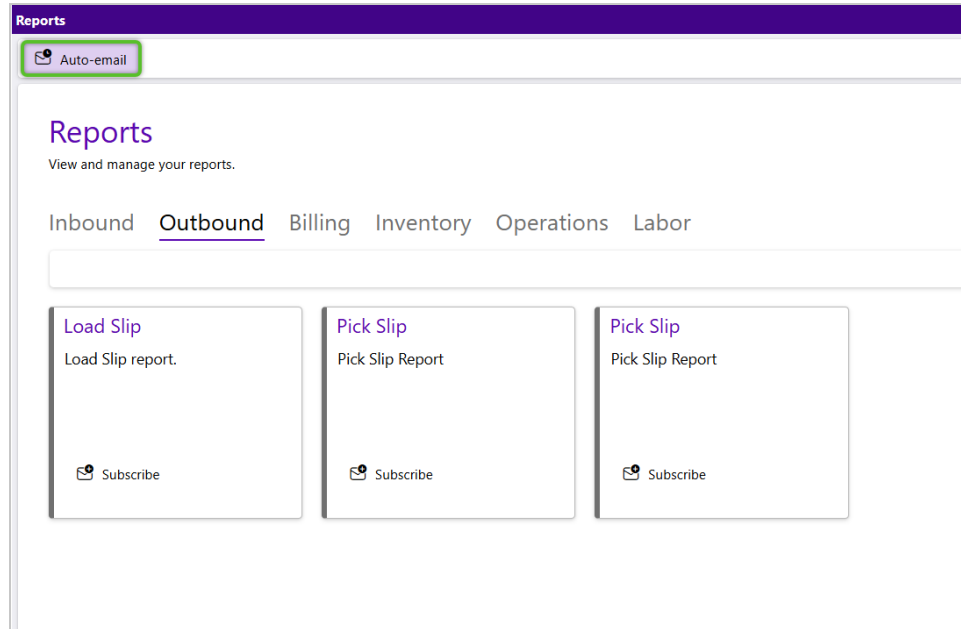


3. Click the **Request history** button to open the email history for the selected rule.



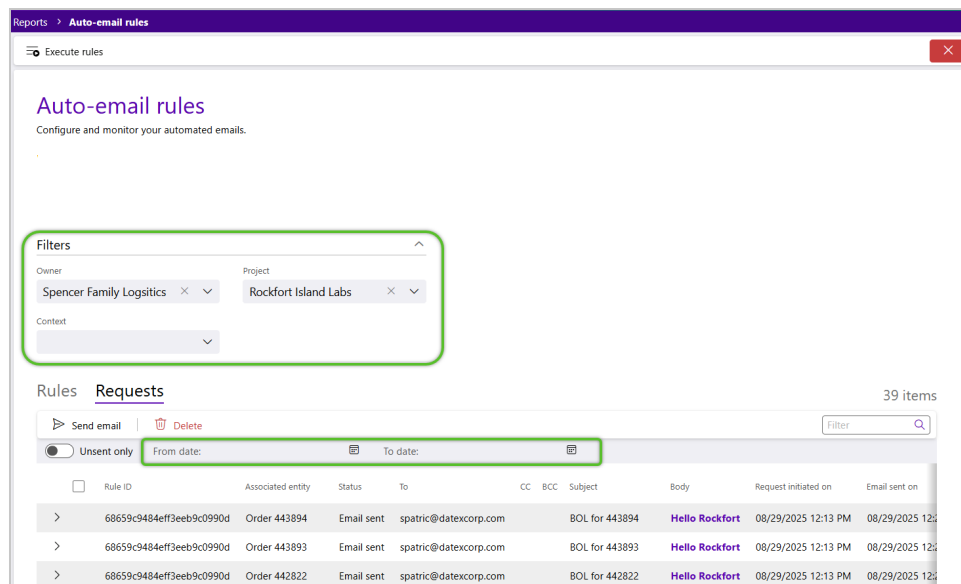
Open Requests tab of Auto-email rules hub

1. From the **Reports** hub, click the **Auto-email rule** button.



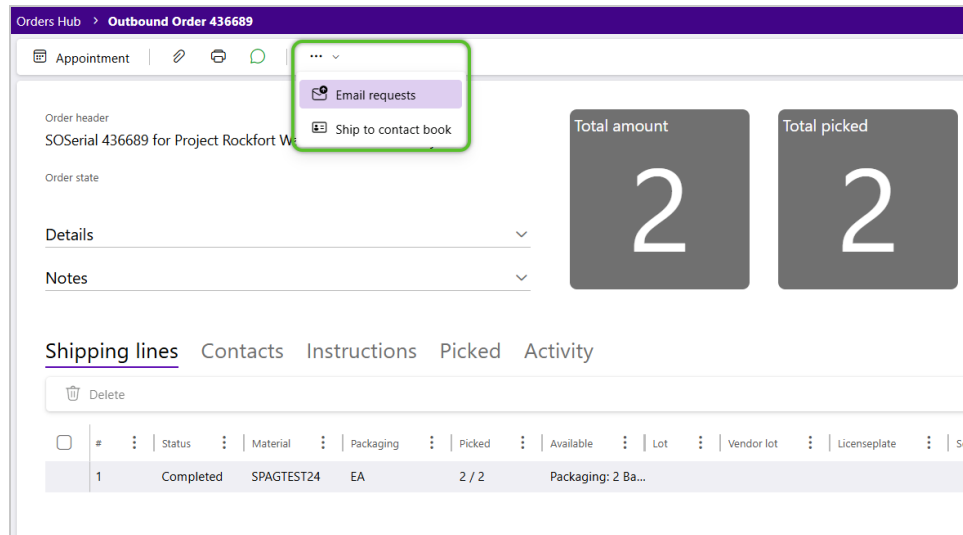
2. Click the **Requests** tab.

The **Requests** tab grid will display the history of email requests for all rules you have access to. If you're looking for a specific email request you may want to utilize the **Owner**, **Project**, and **Context** filters in the **Filters** section and the date filters above the **Requests** grid itself.

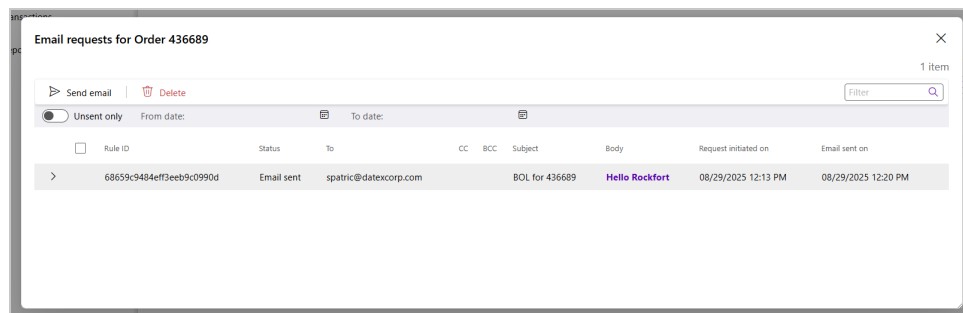


Open request history from an order

1. From an order, click the additional options dropdown (the "... " button), then select **Email Requests**.

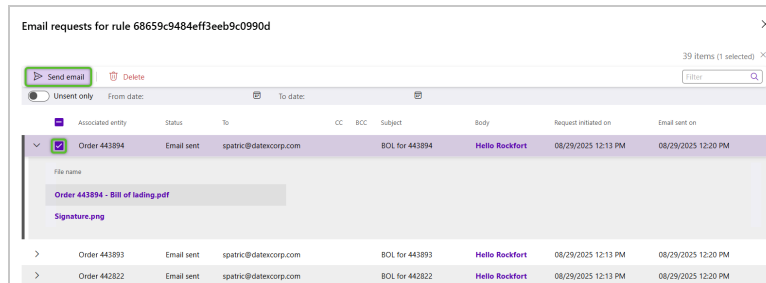


The email request history for the order will open.



Regardless of the method you use to get to a grid containing email requests, the steps to view the content of a sent email and to resend it remain the same.

1. Click the arrow to the left of the row to expand and view any attachment file details. Depending on the auto-email, there may be none.
2. To resend an email, check the box for the Email, then click the purple **Send Email** option.



Portal inventory hub guide

Sections

- [Overview](#)
- [Inventory hub](#)
- [Inventory views](#)

Overview

From the **Inventory hub**, you can add new materials as well as view and perform some limited management of your inventory such as status changes and edits. Only inventory you have access to, along with associated actions taken will be visible to you.

While inventory details can be drilled down through the hyperlinks in the grid, there are also more specific views found in the **Lots hub** and **Serials hub** that can be accessed from the **Inventory hub**.

Inventory hub

The Inventory Hub allows you to create new materials, review your existing inventory, and perform some limited management activities.

Buttons along the top of the Inventory hub allow you to **create a new material** or open the **Lots hub** or **Serial hub**.

Search and filter options are available to quickly locate inventory for review and management. Users can filter by **Owner**, **Project**, **Materials**, and **Warehouse**.

Inventory can be displayed by Pallet, by Lot, or by Material using the **Inventory type** buttons under the **Filters** dropdown.

Inventory details and quantities are listed in the **Inventory** tab, and inventory activity history displays in the **Activity** tab. Each tab on the **Inventory hub** displays its own set of information and options, if any, for managing that information. Data displayed can be **exported**. Expand the sections below for more details about each tab.

Inventory tab

The **Inventory tab** lists all current and incoming inventory (any inventory shipped out is not displayed) associated with the filters set for the hub (**Owner**, **Project**, **Materials** and **Warehouse**). The **Inventory** tab toolbar also provides the option to export the inventory data displayed in the tab.

Inventory

Activity

Export

12 items

☐	Material	Lot	Pallet	Material name	Material description	Total amount	Available amount	Packaging	Warehouse	Project	Gross weight	Weight UOM	Receiving order	Vendor lot	Expiration date	Manufacture date	Received date	
	SPAT01 LOT	3861	SPLP052925-001	SPAT01 LOT	SPAT01 LOT	25	25	EA	Sara-Demo Warehouse	SPatic	11.339800	kg	041725	05/91/2025	05/91/2025	04/17/2025		
	SPAT03 LOT	04032025	SPH40325-001	SPAT03 LOT	SPAT03 LOT	100	0	EA	Sara-Demo Warehouse	SPatic	45.359237	kg	05032025	05/91/2025	04/09/2025	04/09/2025		
	SPAT03 LOT	04032025	SPH40325-001	SPAT03 LOT	SPAT03 LOT	15	0	Box	Sara-Demo Warehouse	SPatic	12.246994	kg	05032025	05/91/2025	04/09/2025	04/09/2025		
	SPAT01 LOT	3861	12672	SPAT01 LOT	SPAT01 LOT	25	25	EA	Sara-Demo Warehouse	SPatic	11.339800	kg	8175	041725	05/91/2025	05/91/2025	04/17/2025	
	SPAT01 LOT	3861	12673	SPAT01 LOT	SPAT01 LOT	25	25	EA	Sara-Demo Warehouse	SPatic	11.339800	kg	8175	041725	05/91/2025	05/91/2025	04/17/2025	

Inventory tab details - by pallet

- Material:** The common lookup code for the material or product.
- Lot:** The Lot ID of the inventory.
- Pallet:** The lookup code of the pallet that inventory is located on.
- Material name:** The alternative identifier for the material or product.
- Material description:** The description of the material or product.
- Total Amount:** The total amount of inventory for the material in the warehouse regardless of status.
- Available amount:** The amount of inventory for the material that is available for allocation.
- Packaging:** The packaging UOM of the material inventory.
- Warehouse:** The warehouse in which the inventory is located.
- Project:** The name of the project associated with the material inventory.
- Gross** The total weight of the material, including the packaging weight in the

weight:	warehouse.
Weight	Unit of measurement for weight. Options include kilogram, gram,
UOM:	pound, ounce, ton, troy ounce, and metric ton.
Receiving order:	Incoming order the lot first came in on.
Vendor lot:	The vendor lot ID of the inventory.
Expiration Date:	The expiration date of the lot inventory.
Manufacture Date:	The manufacture date of the lot inventory.
Received Date:	The date the lot inventory was received.

Inventory tab details - by lot

Material:	The common lookup code for the material or product.
Lot:	The lot ID of the inventory.
Material name:	The alternative identifier for the material or product.
Material description:	The description of the material or product.
Total amount:	The total amount of inventory for the material in the warehouse regardless of status.
Available amount:	The amount of inventory for the material that is available for allocation.
Packaging:	The packaging UOM of the material inventory.
Warehouse:	The warehouse in which the inventory is located.
Project:	The name of the project associated with the material inventory.
Vendor lot:	The vendor lot ID of the inventory.
Gross weight:	The total weight of the inventory for the lot, including the packaging, in the warehouse.
Weight UOM:	Unit of measurement for weight. Options include kilogram, gram, pound, ounce, ton, troy ounce, and metric ton.
Receiving order:	Incoming order the lot first came in on.
Expiration Date:	The expiration date of the lot's inventory.
Manufacture Date:	The manufacture date of the lot's inventory.
Received	The date the lot inventory was received.

Date:

Inventory tab details - by material

- Material:** The common lookup code for the material or product.
- Material name:** The alternative identifier for the material or product.
- Material description:** The description of the material or product.
- Total amount:** The total amount of inventory for the material in the warehouse regardless of status.
- Available amount:** The amount of inventory for the material that is available for allocation.
- Incoming amount:** The amount of inventory that is on order, but not yet received.
- Packaging:** The packaging UOM of the material inventory.
- Warehouse:** The warehouse in which the inventory is located.
- Project:** The name of the project associated with the material inventory.
- Gross weight:** The total weight of the material, including the packaging, in the warehouse.
- Weight UOM:** Unit of measurement for weight. Options include kilogram, gram, pound, ounce, ton, troy ounce, and metric ton.

Activity tab

The **Activity** tab displays the inventory's activity history.

Inventory Activity													47 Items
ID	Warehouse	Operation code	Status	Material	Lot	Project	Serial number	Expected	Actual	Created date	Completed date	Actual source parcel	Actual target parcel
981559	Sara Demo Warehouse	Receiving	Completed	SPK703 LOT	04032025	SPatic	25 EA	25 EA	09/04/2025	09/04/2025		SPLP090425_002	SPLP090425_002
981556	Sara Demo Warehouse	Receiving	Completed	SPK703 LOT	04032025	SPatic	50 EA	25 EA	09/04/2025	09/04/2025		SPLP090425_001	SPLP090425_001
981061	Sara Demo Warehouse	Receiving	Completed	SPK703 LOT	04032025	SPatic	50 Box	50 Box	08/28/2025	08/28/2025		LPP082825_001	LPP082825_001
981054	Sara Demo Warehouse	Picking	Completed	SPK701 LOT	3861	SPatic	25 EA	25 EA	08/28/2025	08/28/2025		SPLP082825_001	8238

Activity tab details

- ID:** A system-generated field containing the system's unique ID for this particular activity.
- Warehouse:** A system-generated field containing the warehouse where the activity for the inventory took place.
- Operation code:** The activity's operation code identifying what kind of activity this is.

Status:	The status of the activity.
Material:	The lookup code of the inventory's material in the activity.
Lot:	The lot assigned to the material inventory in the activity.
Project:	The name of the project associated with the material inventory involved in the activity.
Serial number:	If applicable, the serial number associated with the inventory involved in the activity.
Expected:	The expected amount of inventory and packaging associated with the activity's task.
Actual:	The actual amount of inventory and packaging associated with the activity's task.
Created date:	The date and time the activity was created, likely, but not always, when it started.
Completed date:	The date and time the activity was finished.
Actual source pallet:	The actual pallet inventory began on for the activity.
Actual target pallet:	The actual pallet inventory ended on for the activity.
Notes:	Any notes entered for the inventory activity.

Inventory hub

Your landing page to view inventory across your projects and assigned warehouses.

Filters

Owner: SPatric Project: SPatric

Materials: Warehouse: Sara-Demo Warehouse

Inventory type: **By Pallet** By Lot By Material

Inventory date: 09/08/2025

Inventory Activity 12 items

Export

Material	Lot	Pallet	Material name	Material description	Total amount	Available amount	Packaging	Warehouse	Project	Gross weight	Weight UOM	Receiving order
SPAT01-LOT	3861	SPLP052925-001	SPAT01-LOT	SPAT01-LOT	25	25	EA	Sara-Demo Warehouse	SPatric	11.339809	kg	
SPAT03-LOT	04032025	SP040325-001	SPAT03-LOT	SPAT03-LOT	100	0	EA	Sara-Demo Warehouse	SPatric	45.359237	kg	
SPAT03-LOT	04032025	SP040325-001	SPAT03-LOT	SPAT03-LOT	15	0	Box	Sara-Demo Warehouse	SPatric	12.246994	kg	
SPAT01-LOT	3861	12672	SPAT01-LOT	SPAT01-LOT	25	25	EA	Sara-Demo Warehouse	SPatric	11.339809	kg	8175
SPAT01-LOT	3861	12673	SPAT01-LOT	SPAT01-LOT	25	25	EA	Sara-Demo Warehouse	SPatric	11.339809	kg	8175
SPAT03-LOT	04032025	12670	SPAT03-LOT	SPAT03-LOT	25	25	EA	Sara-Demo Warehouse	SPatric	11.339809	kg	8174
SPAT03-LOT	04032025	12671	SPAT03-LOT	SPAT03-LOT	25	25	EA	Sara-Demo Warehouse	SPatric	11.339809	kg	8174

Inventory sub-hubs and views

As previously mentioned, inventory can be reviewed and managed from several different perspectives, in addition to the **Inventory hub** view. Click to expand each section below to learn more about these inventory sub-hubs and views and the options they offer.

Lots hub

The **Lots hub** displays all inventory by lot that is associated with the filters set on the hub (Owner, Project, Materials and Status). When a material is lot controlled, unique lots and vendor lots will be created for inventory of that material. In addition to the filters mentioned before, lot data can also be filtered by date using the filters in the **Lots** grid.

Vendor Lots

Vendor Lots represent the vendor-assigned identification of a particular group of inventory for a lot controlled material, all sharing the same manufacturing and expiration dates.

Lots

Lots are sub-divisions of vendor lots, which share the same information as provided by their parent vendor lot, but can have an additional description and notes. Each vendor lot must have at least one lot.

In summary, inventory for lot controlled materials is grouped together under vendor lots and lots. For example, inventory for Swiss cheese could be part of the 031525 vendor lot, and the 032251 lot. This allows you to tell apart the batch of Swiss cheese manufactured on 03/15/25 from the rest of the Swiss cheese in the Warehouse, as well as the specific part of that batch that was received on 03/21/25.

GLots

Inventory that is not Lot Controlled is assigned a generic lot, or **GLot**. All inventory for those types of materials will automatically be assigned this as their lot and vendor lot, eliminating the need to enter any information in these fields.

Lots hub details

Material:	The lookup code for the lot's material.
Lot/Vendor Lot:	The lot and vendor lot lookup codes.
Status:	The status of the lot.
Receive Date:	The date and time the lot was first received into the warehouse.
Last Receive Date:	The date and time the lot was most recently received into the warehouse.
Manufactured Date:	The date and time the lot was manufactured.
Expiration Date:	The date and time the lot will expire.
Created Date:	The date and time the lot was created.
Modified Date:	The date and time the lot was last modified.
Notes:	Any notes added to the lot's record.
Owner/Project:	The owner and project of the material the lot is associated with.

Related Tutorials

Tutorials related to lots and vendor lots are:

- [How to update a lot's status](#)

Inventory Hub > Lots Hub

Lots hub
Your landing page to view your lots.

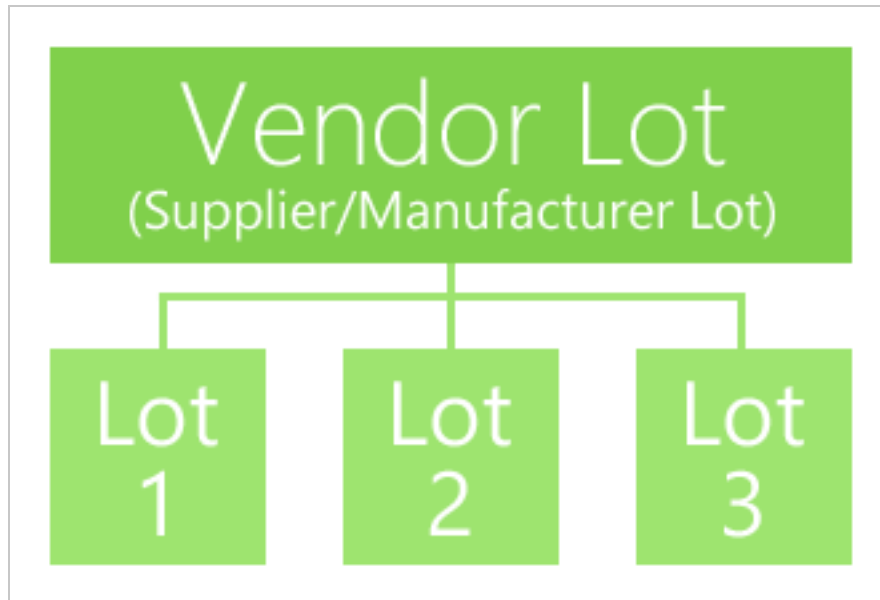
Filters

Lots 5 items

Update status

Date from: Date to: Date type:

☐	Material	Lot / Vendor lot	Status	Receive date	Last receive date	Manufacture date	Expiration date	Created date	Modified date	Notes	Owner / Project
	SPKIT	041725 / 041726	Active	04/17/2025, 11:09 AM	04/17/2025, 2:24 PM	04/17/2025, 3:08 PM	04/17/2026, 3:08 PM	04/17/2025, 11:09 AM	04/17/2025, 2:24 PM		SPatric / SPatric
	SPAT01-LOT	3861 / 041725	Active	04/17/2025, 11:04 AM	08/11/2025, 5:10 PM	05/31/2025, 12:00 AM	05/31/2025, 12:00 AM	04/17/2025, 11:04 AM	08/11/2025, 5:10 PM		SPatric / SPatric
	SPAT03-LOT	04032025 / 05032025	Active	04/03/2025, 10:23 AM	09/04/2025, 3:36 PM	04/03/2025, 10:22 AM	05/01/2025, 12:00 AM	04/03/2025, 10:22 AM	09/04/2025, 3:36 PM		SPatric / SPatric
	SPAT01-LOT	3822	Active	03/20/2025, 10:24 AM	03/20/2025, 12:51 PM	03/20/2025, 12:00 AM	03/20/2026, 12:00 AM	03/20/2025, 10:02 AM	03/20/2025, 12:51 PM		SPatric / SPatric



Lot record

When opening individual lots, they will have their own dedicated page view for the record with a listing of all the current in warehouse inventory and the activity history for actions taken against the lot. From the record you can update the lot's status, add a discussion comment or edit some lot details such as the expiration date.

Inventory tab

The inventory tab lists all current inventory, meaning inventory that hasn't been shipped out, for the selected lot. Displayed inventory can be searched using the filter field (if using the filter field to search either click outside the field after entering the search value or tab out of the field). Data displayed in the inventory tab grid can be exported.

Inventory

Activity

Export

Filter

Material	Lot	Material name	Material description	Total amount	Available amount	Packaging	Warehouse	Project	Vendor lot	Gross weight	Weight UOM	Receiving order	Expiration date	Manufacture date	Received date
----------	-----	---------------	----------------------	--------------	------------------	-----------	-----------	---------	------------	--------------	------------	-----------------	-----------------	------------------	---------------

Inventory tab detail

Material:	The common lookup code for the material or product.
Lot:	The lot ID of the inventory.
Material name:	The alternative identifier for the material or product.
Material description:	The description of the material or product.
Total amount:	The total amount of inventory for the material in the warehouse regardless of status.
Available amount:	The amount of inventory for the material that is available for allocation.
Packaging:	The packaging UOM of the material inventory.
Warehouse:	The warehouse in which the inventory is located.
Project:	The name of the project associated with the material inventory.
Vendor lot:	The vendor lot ID of the inventory.
Gross weight:	The total weight of the inventory for the lot, including the packaging, in the warehouse.
Weight UOM:	The physical Location of the Inventory in the Warehouse.
Receiving order:	Incoming order the lot first came in on.
Expiration Date:	The expiration date of the lot inventory.
Manufacture Date:	The manufacture date of the lot inventory.
Received Date:	The date the lot inventory was received.

Activity tab

The **Activity** tab displays the lot's activity history.

Inventory

Activity

19 items

filter

ID	Warehouse	Operation code	Status	Material	Lot	Project	Serial number	Expected	Actual	Created date	Completed date	Actual source pallet	Actual target pallet	Notes
----	-----------	----------------	--------	----------	-----	---------	---------------	----------	--------	--------------	----------------	----------------------	----------------------	-------

Activity tab details

- ID:

A system-generated field containing the system's unique ID for this particular activity.
- Warehouse:

A system-generated field containing the warehouse where the activity for the inventory took place.
- Operation code:

The activity's operation code identifying what kind of activity this is.
- Status:

The status of the activity.
- Material:

The lookup code of the inventory's material in the activity.
- Lot:

The lot assigned to the material inventory in the activity.
- Project:

The name of the project associated with the material inventory involved in the activity.
- Serial number:

If applicable, the serial number associated with the inventory involved in the activity.
- Expected:

The expected amount of inventory and packaging associated with the activity's task.
- Actual:

The actual amount of inventory and packaging associated with the activity's task.
- Created date:

The date and time the activity was created, likely, but not always, when it started.
- Completed date:

The date and time the activity was finished.
- Actual source pallet:

The actual pallet inventory began on for the activity.
- Actual target pallet:

The actual pallet inventory ended on for the activity.
- Notes:

Any notes entered for the inventory activity.

Related Tutorials

Tutorials related to lots and vendor lots are:

- How to update a lot's status
- How to edit lot details

Inventory Hub > Lots Hub > Lot 3861

Edit lot

Change status

3861

Vendor lot 041725

Material

SPAT01-LOT

Manufactured on

05/31/2025

Status

Active

Project

SPatric

Expires on

05/31/2025

Total available

265

Total weight

267.6

Total quantity

590

Inventory

Activity

2 items

Export

Filter

Material	Lot	Material name	Material description	Total amount	Available amount	Packaging	Warehouse	Project	Vendor lot	Gross weight	Weight UOM	Receiving order	Expiration date	Manufacture
SPAT01-LOT	3861	SPAT01-LOT	SPAT01-LOT	490	190	EA	Datex Dry	SPatric	041725	222.260261	kg	8175	05/31/2025	05/31/2025
SPAT01-LOT	3861	SPAT01-LOT	SPAT01-LOT	100	75	EA	Sara-Demo Warehouse	SPatric	041725	45.359237	kg	8175	05/31/2025	05/31/2025

Serial numbers hub

The **Serial numbers hub** displays inventory by serial numbers and can be filtered by **Owner, Project, Materials, Warehouses**, and **Archived** (whether or not the serialized inventory is still in the warehouse or has been shipped out) status.

Serial numbers are a way of identifying each individual item of Inventory, rather than remaining anonymous within the quantity of that type. When a material is serial controlled, the unique serial numbers for each unit of the inventory of that material is tracked.

A unique history of the serial's activity history (detailing where the inventory has been at what time, its past Statuses, and so on) is also kept with the serial number.

Serial numbers are also used to track variable weights and variable lengths materials, so the precise measurement for each is recorded. For any item that is not serial controlled but uses variable weights or dimensions, the system will automatically create and assign the item a serial number to track it by.

Serial numbers details

ID:	The system-generated ID for the serial number.
Serial number:	The serial number's lookup.
Packaging:	The packaging type used by the material for the serial number.
Status:	The status of the serial number.
Material:	The lookup code for the material of the serial number.
Lot:	The lookup code of the lot the serial number is part of, this may be a generic Glot if the material isn't lot controlled.
Vendor lot:	The lookup code of the vendor lot the serial number is part of, this may be a generic Glot if the material isn't lot controlled.
Pallet:	The pallet on which the serial number is located.
Project:	The project under which the serial number's material is classified.
Warehouse:	The warehouse in which the serial number is located.
Net Weight:	The weight of the inventory the serial number represents, not including its packaging.
Gross Weight:	The weight of the inventory the serial number represents, including its packaging.
Weight UOM:	The unit by which the serial number's material's weight is measured.
Length:	The length of the inventory the serial number represents.
Width:	The width of the inventory the serial number represents.
Height:	The height of the inventory the serial number represents.
Dimension UOM:	The unit by which the Serial Number's Material's dimensions are measured.
Net Volume:	The volume of the inventory the serial number represents, not including its packaging.
Gross Volume:	The volume of the inventory the serial number represents, including its packaging.
Volume UOM:	The unit by which the serial number's material's volume is measured.
Created Date:	The date the serial number was created.
Created User:	The logged in user that created the serial number or performed the action that generated it.

Notes: Any notes added to the serial number's record.

Inventory Hub > Serial Numbers Hub

Serial numbers hub

Your landing page to view serial numbers and all related actions across projects and or warehouses.

Filters

Total available

1.5K

Total amount

3.2K

Serial numbers

3249 items

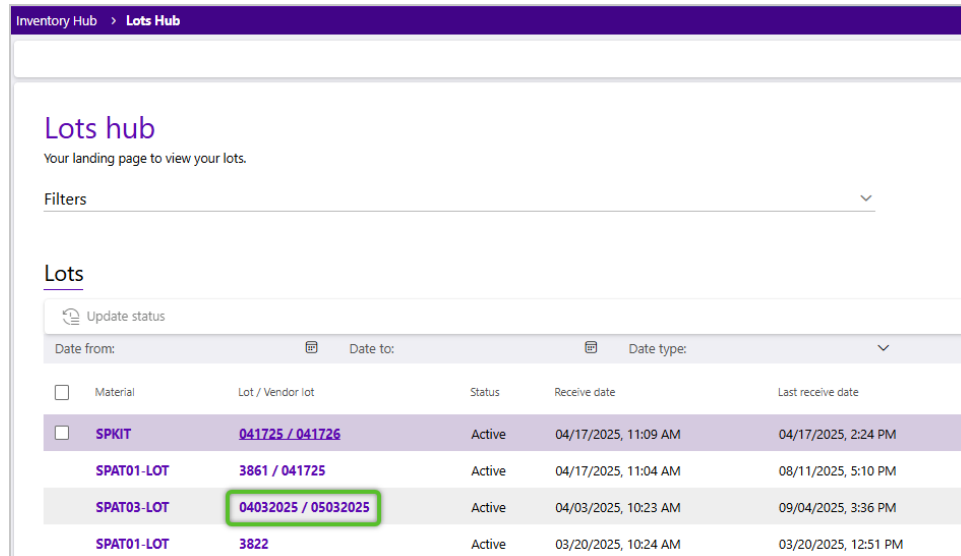
Filter

☐	ID	Serial number	Packaging	Status	Material	Lot	Vendor lot	Pallet	Project	Warehouse	Net weight	Gross weight	UOM	Length	Width	Height	UOM	Net volume	Gross volume	UOM
	202558	510782SI	Vials	Active	Antibiotics	4217	4217	12774ILP	Datex Pharma	Datex Cold	1	2	g	1	1	1	in	1	1	cu
	202557	510781SI	Vials	Active	Antibiotics	4217	4217	12774ILP	Datex Pharma	Datex Cold	1	2	g	1	1	1	in	1	1	cu
	202556	510780SI	Vials	Active	Antibiotics	4217	4217	12774ILP	Datex Pharma	Datex Cold	1	2	g	1	1	1	in	1	1	cu
	202555	510779SI	Vials	Active	Antibiotics	4217	4217	12774ILP	Datex Pharma	Datex Cold	1	2	g	1	1	1	in	1	1	cu

Edit lot information

Provided you have access through Footprint Portal, you can make multiple changes to information in the lot record that will reflect the changes right away.

1. Open a lot record from any grid where its lookup code appears as a hyperlink.



Inventory Hub > Lots Hub

Lots hub

Your landing page to view your lots.

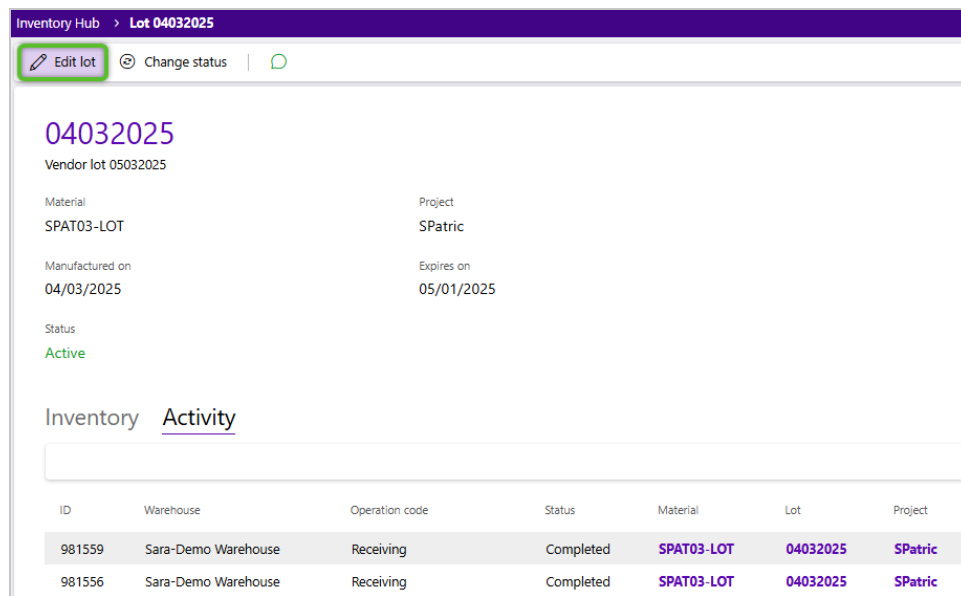
Filters

[Update status](#)

Date from: Date to: Date type:

☐	Material	Lot / Vendor lot	Status	Receive date	Last receive date
☐	SPKIT	041725 / 041726	Active	04/17/2025, 11:09 AM	04/17/2025, 2:24 PM
	SPAT01-LOT	3861 / 041725	Active	04/17/2025, 11:04 AM	08/11/2025, 5:10 PM
	SPAT03-LOT	04032025 / 05032025	Active	04/03/2025, 10:23 AM	09/04/2025, 3:36 PM
	SPAT01-LOT	3822	Active	03/20/2025, 10:24 AM	03/20/2025, 12:51 PM

2. Click the **Edit lot** button to open the **Edit lot** flyout.



Inventory Hub > Lot 04032025

[Edit lot](#) [Change status](#) [D](#)

04032025

Vendor lot 05032025

Material: SPAT03-LOT Project: SPatric

Manufactured on: 04/03/2025 Expires on: 05/01/2025

Status: Active

Inventory Activity

ID	Warehouse	Operation code	Status	Material	Lot	Project
981559	Sara-Demo Warehouse	Receiving	Completed	SPAT03-LOT	04032025	SPatric
981556	Sara-Demo Warehouse	Receiving	Completed	SPAT03-LOT	04032025	SPatric

3. In the **Edit lot** flyout, make your desired changes. Changes can be made to any of the fields including the **Expiration date** and **Lot code**.

3. Click the **Confirm** button to save the changes.

Edit Lot

Confirm

Cancel

Lot code

04032025

Status

Active

Description

SPAT03-LOT

Vendor lot

05032025

Expiration date

5/3/2025

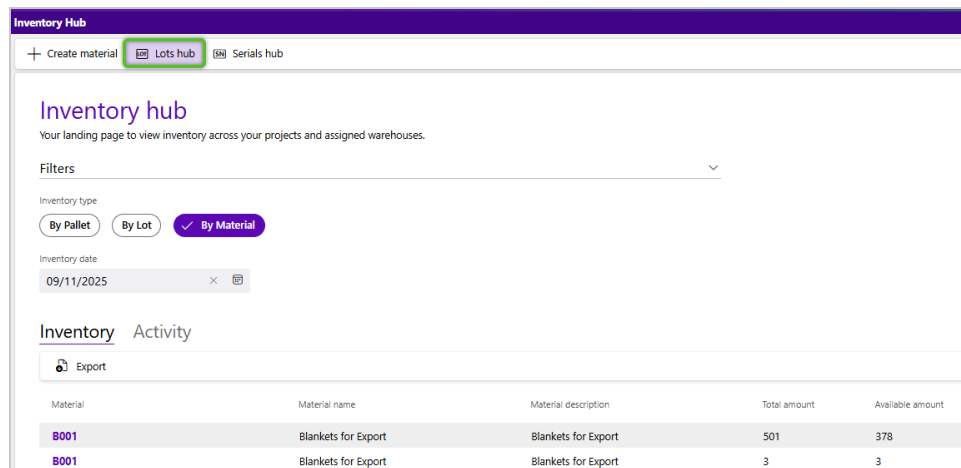
Notes

Change lot status

The status of a lot is one of the ways to determine whether or not inventory for that lot is available. Any status other than Active will generally make inventory unavailable for selection to be shipped out. You have access from the Footprint Portal to update the statuses of your lots through a couple of approaches.

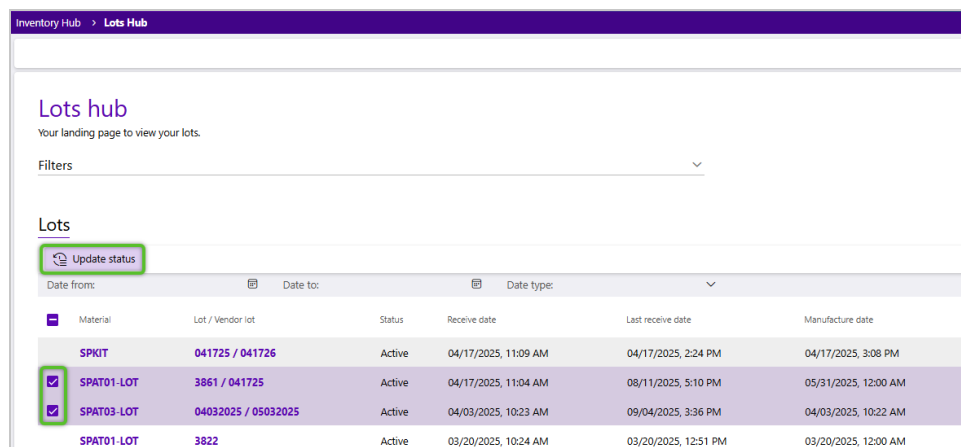
Update the status of the lot(s) from the Lot hub

1. In the **Inventory hub**, click the **Lots hub** button.



1. On the **Lots hub** in the **Lots** tab, locate the row(s) containing the lot(s) to have their statuses updated, and click the **Update status** button.

Multiple lots can be selected and updated.



2. Select the status the lot(s) will be updated to (you can only choose one, if you want the lots to be different status you will need to update them individually). You can provide optional Reason codes to further inform why the status is changing by checking the boxes in the **Reason codes** dropdown multi-selector, then click the **Confirm** button.

Lot status update

Confirm **Cancel**

Lot status update

Message

Lot(s) 3861, 04032025 will be updated.

Status *

QC HOLD

Reason codes

- ☐ Aging 120 Days
- ☐ Allergen Hold
- ☐ AVL
- ☐ Blast Hold
- ☐ Bond
- ☒ Customer
- ☒ Customs Hold
- ☐ Damaged

3. After the status update processes, click the **OK** button to close the confirmation window.

The changed status of the lot(s) will be reflected in the grid.

Update the status of a lot from the lot record

1. Open a lot record from any grid where its lookup code appears as a hyperlink.

Inventory Hub > Lots Hub

Lots hub

Your landing page to view your lots.

Filters

Lots

Update status

Date from: Date to: Date type:

☐	Material	Lot / Vendor lot	Status	Receive date	Last receive date
☐	SPKIT	041725 / 041726	Active	04/17/2025, 11:09 AM	04/17/2025, 2:24 PM
	SPAT01-LOT	3861 / 041725	Active	04/17/2025, 11:04 AM	08/11/2025, 5:10 PM
	SPAT03-LOT	04032025 / 05032025	Active	04/03/2025, 10:23 AM	09/04/2025, 3:36 PM
	SPAT01-LOT	3822	Active	03/20/2025, 10:24 AM	03/20/2025, 12:51 PM

2. In the lot record, click the **Change status** button in the red toolbar along the top.

Inventory Hub > Lot 04032025

Edit lot Change status

04032025

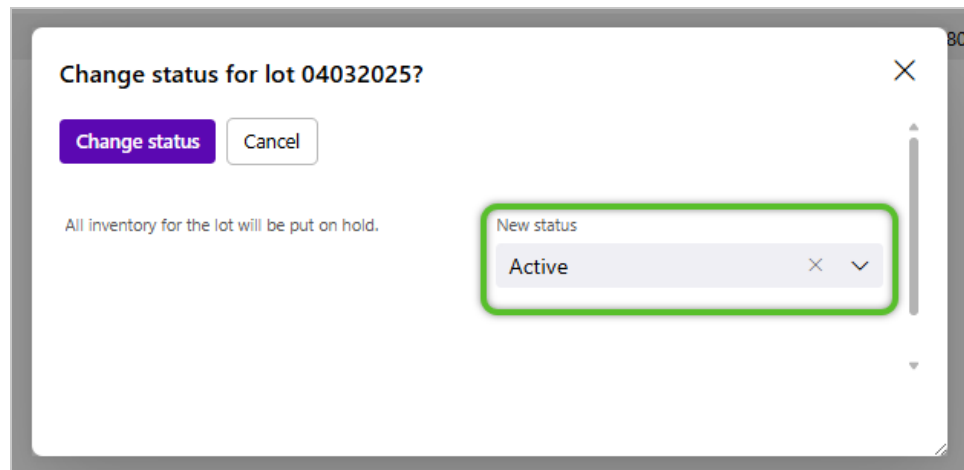
Vendor lot 05032025

Material	Project
SPAT03-LOT	SPatric
Manufactured on	Expires on
04/03/2025	05/01/2025
Status	
Active	

Inventory Activity

ID	Warehouse	Operation code	Status	Material	Lot	Project
981559	Sara-Demo Warehouse	Receiving	Completed	SPAT03-LOT	04032025	SPatric
981556	Sara-Demo Warehouse	Receiving	Completed	SPAT03-LOT	04032025	SPatric
981061	Sara-Demo Warehouse	Receiving	Completed	SPAT03-LOT	04032025	SPatric

3. Set the **New status**.



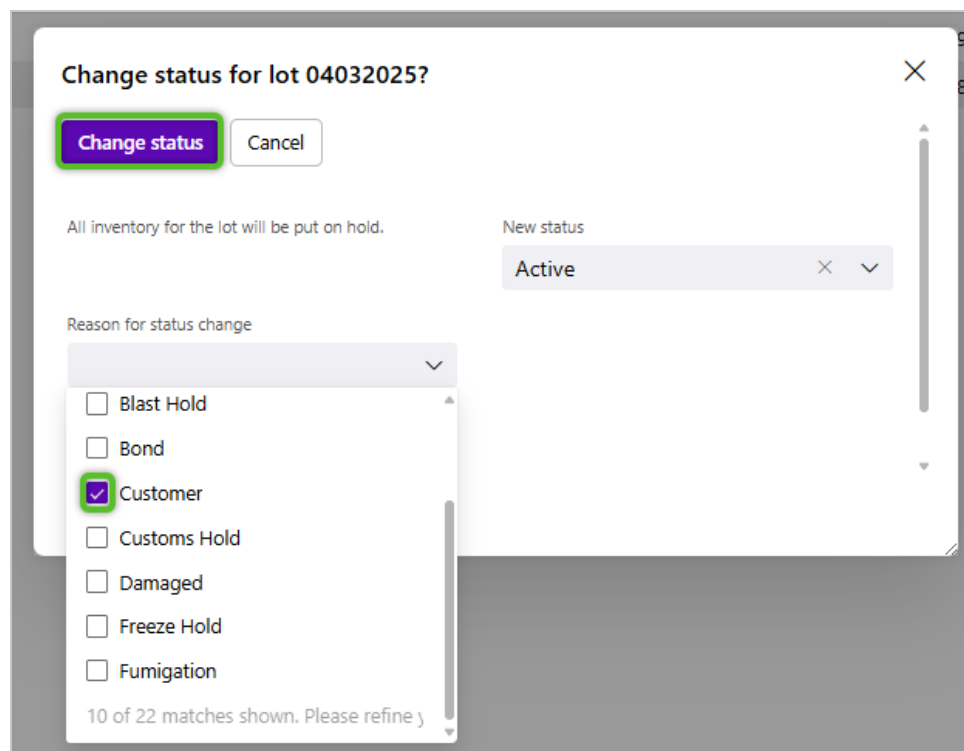
Change status for lot 04032025?

Change status Cancel

All inventory for the lot will be put on hold.

New status
Active

3. After the status has been selected, you'll have the option to add reason code(s) to document why the status change is being made by checking boxes in the **Reason for status change** multi-selector dropdown.



Change status for lot 04032025?

Change status Cancel

All inventory for the lot will be put on hold.

New status
Active

Reason for status change

- ☐ Blast Hold
- ☐ Bond
- ☒ Customer
- ☐ Customs Hold
- ☐ Damaged
- ☐ Freeze Hold
- ☐ Fumigation

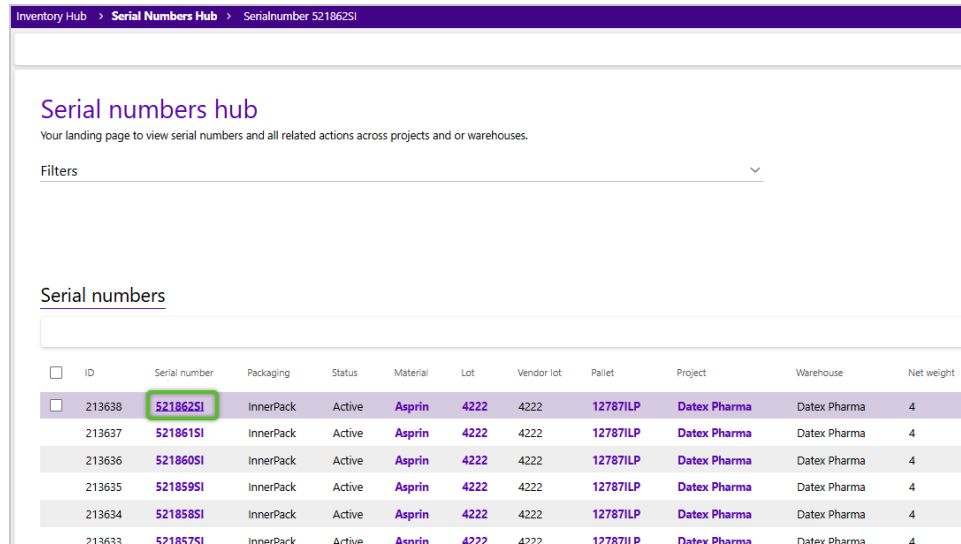
10 of 22 matches shown. Please refine y

The status update will process and be reflected in the record.

Edit serial information

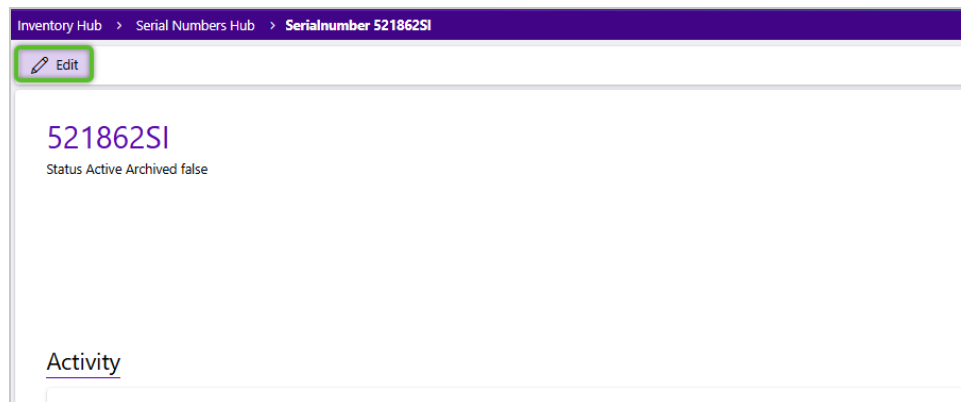
Provided you have access in Footprint Portal, you can make multiple changes to information in the serial record that will reflect the changes right away.

1. Open a serial record from any grid where the **Serial number** appears as a hyperlink.



ID	Serial number	Packaging	Status	Material	Lot	Vendor lot	Pallet	Project	Warehouse	Net weight
213638	521862SI	InnerPack	Active	Asprin	4222	4222	12787ILP	Datex Pharma	Datex Pharma	4
213637	521861SI	InnerPack	Active	Asprin	4222	4222	12787ILP	Datex Pharma	Datex Pharma	4
213636	521860SI	InnerPack	Active	Asprin	4222	4222	12787ILP	Datex Pharma	Datex Pharma	4
213635	521859SI	InnerPack	Active	Asprin	4222	4222	12787ILP	Datex Pharma	Datex Pharma	4
213634	521858SI	InnerPack	Active	Asprin	4222	4222	12787ILP	Datex Pharma	Datex Pharma	4
213633	521857SI	InnerPack	Active	Asprin	4222	4222	12787ILP	Datex Pharma	Datex Pharma	4

2. Click the **Edit** button to open the **Edit lot** flyout.



[Inventory Hub](#) > [Serial Numbers Hub](#) > **Serialnumber 521862SI**

[Edit](#)

521862SI

Status Active Archived false

[Activity](#)

3. In the **Edit serial number** flyout, make your desired changes. Changes can be made to the **Status**, **Details**, and **Notes**.

3. Click the **Confirm** button to save the changes.

Edit Serialnumber

Confirm

Cancel

Serial number

521862SI

Status

Active

Archived

☐

Details

Length

5.00

Width

4.00

Height

6.00

Dimension UOM

in

Net weight

4.00

Gross weight

10.00

Net volume

120.00

Gross volume

120.00

Portal Materials hub guide

Sections

- [Overview](#)
- [Materials Hub](#)
- [Material Record](#)

Materials are the most basic part of your Warehouse, and the reason you have a Warehouse in the first place - Materials are how you define your [inventory](#).

Overview

Everything you store in your Warehouse, every item you ship out or receive, each piece of inventory is defined by a material. Inventory you work with requires a material in the system to represent it, and the information about those items can be managed in the **Materials hub**. Materials can be created, edited, and reviewed from the hub. Options in material configuration include different ways to group together like materials for storage and billing purposes as well as defining packaging levels.

Materials hub

The **Materials hub** allows you to create and manage your materials from Footprint Portal. Materials are listed in their respective tab, in ascending alpha-numeric order. **Filters** for **Owner**, **Project**, and **Materials** can be applied.

Material	UPC	Packaging	Sub-packaging	Sub-packaging quantity	Status	Length	Width	Height	Weight	Shipping weight	Volume	Shipping volume	Pallet high	Pallet tie	Group	Allocation strategy	Lot controlled	Serial controlled	Fixed weight	Fixed volume
SPAT01 LOT		EA		0	Active	1	1	1	1	1	1	1			General	FIFO	☒	☐	☒	☒
SPAT01 LOT		Case	EA	50	Active	1	1	1	1	1	1	1			General	FIFO	☒	☐	☒	☒
SPAT02		EA		0	Active	1	1	1	1	1	1	1			General	FIFO	☐	☐	☒	☒
SPAT03 LOT		EA		0	Active	3	2.5	1	1	1	7.5	7.5			General	FIFO	☒	☐	☒	☒
SPAT03 LOT		Box	EA	15	Active	17	20	12	1.5	1.8	4080	4080			General	FIFO	☒	☐	☒	☒
SP00T	00041725	EA		0	Active	1	1	1	1	1	1	1			General	FIFO	☒	☐	☒	☒

Icons along the top of the Materials Hub allows users to **create a new material**, and manage project .

In addition to the **Filters**, you can also search by entering a material's name, UPC, or description in the Search field in the top right corner of the **Materials** tab toolbar.

Materials tab

The **Materials** tab lists all materials matching the filter and search criteria, in ascending alpha-numeric order. Basic information about the materials is displayed. If a material has multiple levels of packaging, such as eaches and cases each level will be a separate line in the grid. Selecting a **material record** will open it so you can review and manage its details.

Materials tab details

Material:	The name of the material.
UPC:	The Universal Product Code, for the level of packaging detailed in the line.
Packaging:	The packaging level for the material inventory displayed in the line.
Sub-packaging:	The sub-packaging of the line's packaging, if any.
Sub-packaging quantity:	The amount of the sub-packaging inside the line's packaging, if any.
Status:	The current status of the material.
Length:	The length of the material in the line's level of packaging. Only applicable if the material has Fixed dimensions .
Width:	The width of the material in the line's level of packaging. Only applicable if the material has Fixed dimensions .
Height:	The height of the material in the line's level of packaging. Only applicable if the material has Fixed dimensions .
Shipping weight:	Weight of the items in line's package, combined with the weight of the package itself (tare weight). Only applicable if the material is

	Fixed weight.
Volume:	The volume of the line's level of packaging. Only applicable when the material is Fixed volume .
Shipping volume:	Volume of the line's packaging if it varies when shipping. Only applicable when the material is Fixed volume .
Pallet high:	The number of this units of this level of packaging that can be stacked atop each other.
Pallet tie:	The number of this units of this level of packaging to be placed per level on a pallet before you begin stacking atop them.
Group:	The grouping of similar materials the material is assigned to.
Allocation strategy:	The criteria by which inventory for this material is selected for a shipping order.
Lot controlled:	Indicates whether or not the Material is Lot Tracked, or Controlled.
Serial controlled:	Indicates whether or not the Material is Serial Tracked, or Controlled.
Fixed weight:	Indicates whether or not the Material Weight is always fixed.
Fixed volume:	Indicates whether or not the Material Volume is always fixed.
Fixed dimensions:	Indicates whether or not the Material Dimensions are always fixed.
Shelf Life:	The number of days the Material should be kept in the warehouse for. For a Lot Controlled Material, the Shelf Life is added to the Manufacture Date, and an Expiration Date is automatically created.
Description:	A short description of what the Material is.
Owner:	The material's owner.
Project:	The project under which this material is classified.

Materials tab toolbar

Export:	Allows users to export data displayed in the grid.
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Material Record

The material record can be opened for further review and management by clicking the material name hyperlink. The material's basic information will be displayed, including the name, status, and description. The default inventory view is "**By Material**". Users can also view the material's Inventory "**By Pallet**" or "**By Lot**".

Icons along the top of the Material record allows users to **edit material details**, **add and manage attachments**, or **view and add comments to a discussion**.

Material record details

In addition to the material's name, status, and description displayed at the top of the page, there is more information entered when creating a new Material.

Material creation details

Details that can be entered when **creating a new material** are described in the table below.

Basic Information

Material code:	A short code to identify the material by, unique to the Project. If using barcodes, the material's barcode would go here.
Name:	The name of the material.
Description:	A short description of what the material is.
Owner:	The material's associated owner.
Project:	The project under which this material is assigned.
Packaging:	The packaging for the material being created. If there are multiple packaging levels for the material, start with the base level of packaging. More can be added later.
UPC code:	Universal Product Code, unique to each level of packaging. Multiple UPC codes can be entered here, each separated by a comma.
Group:	The material's assigned material group. Commonly used to associate materials that share common storage and/or billing rules. If you're not planning to use material groups, the out-of-the-box "No Group" option can be used.

***Those in red are required fields.**

Configuration

Allocation strategy:	The Allocation Strategy takes into account related material information when determining what inventory to select for a shipping order. This allows Inventory to be selected to Ship based on set preferences. For example, First Expired, First Out (FEFO) and First In, First Out (FIFO).
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Out-of-the-box options include Allocation Strategies with the following configurations:

- **FEFO** - First Expired, First Out. Lot controlled inventory whose expiration dates are nearest are assigned to orders.
- **FIFO** - First In, First Out. The inventory that was received to the warehouse first is selected for orders before newer inventory.
- **FMFO** - First Manufactured, First Out. The inventory that were originally manufactured first is assigned to orders before newer materials.
- **LEFO** - Last Expired, First Out. The inventory whose expiration dates are furthest away are assigned to orders.

Lot controlled: Checking this box will indicate whether or not the material will track inventory utilizing individual lots to store expiration and manufacturing dates. If left unchecked the material will not utilize individual lots and will instead use a G-lot (generic lot) for all of the material's inventory. This option can be used in combination with the **Serial controlled** option and cannot be changed once there is inventory for the material in the warehouse.

Serial controlled: Checking this box will indicate inventory for the material will utilize serial numbers for tracking. This option can be used in combination with the **Lot controlled** option and cannot be changed once there is inventory for the material in the warehouse.

***Those in red are required fields.**

Measurements

Fixed weight: Indicates whether or not the material weight is always the same. If unchecked individual pieces of inventory will require their unique weight to be documented on receipt or input and will be assigned a unique serial number.

Fixed volume: Indicates whether or not the material volume is always the same. If unchecked individual pieces of inventory will require their unique volume to be documented on receipt or input and will be assigned a unique serial number.

Fixed dimensions: Indicates whether or not the material dimensions are always the same. If unchecked individual pieces of inventory will require their unique dimensions to be documented on receipt or input and will be assigned a unique serial number.

Decimal precision: Allows the Package to be split into fractions. the **0 decimal places** does not allow splitting, requiring each package to be whole; each subsequent setting (**1 decimal place**, **2 decimal places**, etc.), allow

division up to the specified decimal place. For example, the package "Gallon" with the setting of **3 decimal places** could have an inventory of 3.672 Gallons.

Weight:	Weight of the items in the selected package. Only required when the material is Fixed weight .
Shipping weight:	Weight of the items in the selected package, combined with the weight of the package itself (Tare Weight). Only required when the Fixed Weight toggle is in use. Only required when the material is Fixed weight .
Weight measure:	Unit of measurement for weight. Options include kilogram, gram, pound, ounce, ton, troy ounce, and metric ton. Only required when the material is Fixed weight .
Volume:	The volume of the package. Footprint automatically computes a volume based on the length width and height, which is displayed underneath those measurements. Only required when the material is Fixed volume .
Shipping volume:	Volume of the package considering any other factors that may impact the package before shipping. Only required when the material is Fixed volume .
Volume measure:	Unit of measurement for volume. Options include cubic meter, cubic centimeter, cubic foot, and cubic inch. Only required when the material is Fixed volume .
Length:	Length of the selected material package. Only required when the material is Fixed dimensions .
Width:	Width of the selected material package. Only required when the material is Fixed dimensions .
Height:	Height of the selected material package. Only required when the material is Fixed dimensions .
L x W x H measure:	Unit of measurement for dimensions. Options include meter, centimeter, foot, and inch. Only required when the material is Fixed dimensions .

***Those in red are required fields.**

Storage rules

Pallet high:	How many units high the selected material packaging can be stacked atop itself.
Pallet tie:	How many units to set down per level on a pallet before stacking.
Shelf life (in days):	The number of days the material should be kept in the warehouse before it expires. For a lot controlled material, the shelf life is added to the manufacture date, and an expiration date is automatically

	created when creating a new lot.
Storage category rule:	When used in with storage categories on locations, this can be set to determine where a material can and cannot be stored.

Material record toolbar options

Edit material details

Once created materials can be edited. Details that can be entered during **material creation** are described in the table above. However, when editing a material the flyout will look different. Details regarding packaging and measurements will not be included. They can instead be found on the material record **Packagings** tab to be edited.

Note

Much of the information and rules set here cannot be changed while any units of this Material exist in the Warehouse. Once all of a Material's Inventory has been removed, then edits can once again be made. Those fields will be marked red.

Basic Information

Edit material

Confirm

Cancel

Material code

SPAT01-LOT

Name

SPAT01-LOT

Description

SPAT01-LOT

Material group

General

Status

Active

☒ Lot controlled

☐ Serial controlled

☒ Fixed weight

☒ Fixed dimension

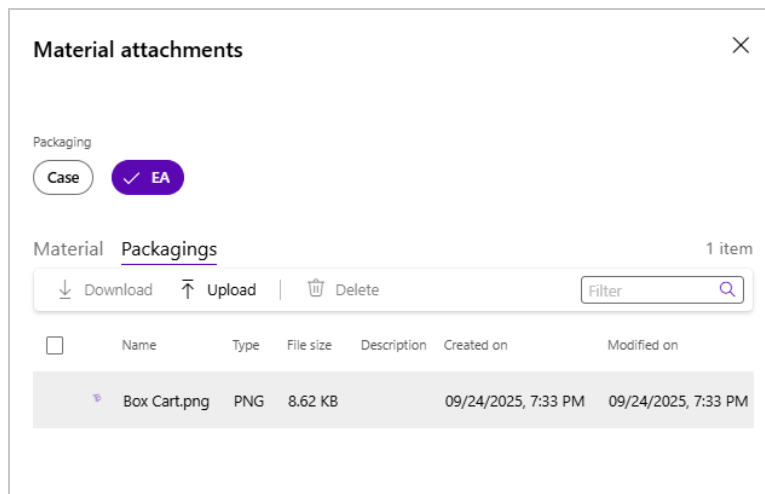
Storage category rule

Material code:	A short code to identify the material by, unique to the Project. If using barcodes, the material's barcode would go here.
Name:	The name of the material.
Description:	A short description of what the material is.
Material group:	The material's assigned material group. Commonly used to associate materials that share common storage and/or billing rules. If you're not planning to use material groups, the out-of-the-box "No Group" option can be used.
Status:	There are several pre-defined Statuses to choose from, as well as any custom Statuses added by the warehouse's Footprint WMS. When a material is created, the default status is "Active". In the future, if something has changed with the material, you may want to change its status. Other status examples include "Inactive", "Discontinued", and "Damaged". Any status other than "Active" will make the material inactive and thus unable to be allocated in most scenarios regardless of what the status is called.
Lot Controlled:	Indicates whether or not the Material is Lot Tracked, or Controlled.
Serial Controlled:	Indicates whether or not the Material is Serial Number Tracked, or Controlled.
Fixed Weight:	Indicates whether or not the Material Weight is always fixed.
Fixed Dimension:	Indicates whether or not the Material Dimensions are always fixed.
Storage Category Rule:	Specifies the Storage Category to which the Material belongs.

***Those in red cannot be edited when there is inventory in the warehouse.**

Attachments

The **Material attachments** flyout allows users to view and upload files, including images, to associate with a material or one of its packagings. Image files added at the packaging level are used throughout the rest of Footprint to assist users in visually identifying the inventory in the warehouse. For example, pack verification.



Click the **Attachments** button (paperclip) in the toolbar to open the record's attachments flyout to view and manage files, including images. Basic information about the file is displayed here along with a thumbnail of any image already uploaded.

Depending on the record type, there may be more than one tab to which images can be added. For example, an inbound order record offers an **Order** tab and a **Shipment** tab, whereas a material record offers a **Material** tab and a **Packaging** tab. Be sure to click the desired tab before clicking the **Upload** option.

Attachment Details

Name:	The name of the attachment.
Type:	The attachment file Type.
File size:	The attachment file size in pixels.
Description:	The description of the attachment.
Created on:	The date the attachment file was uploaded.
Modified on:	The date the attachment file was modified.

Clicking the **Upload** button opens a window to locate and select a file to be added. For step-by-step instructions, please visit our [Add Attachments](#) tutorial.

Selecting an existing file and clicking the **Download** option will open a confirmation window and then if confirmed, the file will be downloaded. Selecting an existing file and clicking **Delete** will open a confirmation window and if confirmed, the file will be deleted.

Before uploading a file to the **Packaging** tab, first select the **Packaging Type** of the Material to which the new file will be added.

While each package level can have its own image, the use of this feature is left open to your particular operation. Some warehouses prefer to put an image of the product itself (commonly referred to as an "each"). Other warehouses, particularly those with a robust hierarchy of package levels, will take pictures of each actual packaged unit and match it to the package level in Footprint. This assists in picking and packing when it may be confusing to a user whether an item is an each, case, pack, bundle, etc.

Material record tabs

Each material record allows the user to review the material's **Inventory**, **Activity**, and **Packagings**. Expand the sections below for more details about each tab.

Inventory

The material **Inventory** tab lists all available instances of the selected material.

The **Inventory** tab is grouped "**By Material**" by default. Material inventory can also be grouped "**By Pallet**" and "**By Lot**". The information displayed in the **Inventory** tab will change depending upon the selected grouping.

Selecting a row or multiple rows allows users to **Export** the selected details to an Excel spreadsheet.

Material Inventory tab details

By Material

Inventory type										
By PalletBy LotBy Material										
InventoryActivityPackagings										
ExportFilter 3 items										
Material	Material name	Material description	Total amount	Available amount	Incoming amount	Packaging	Warehouse	Project	Gross weight	Weight UOM

- Material:

The material lookup code.
- Material name:

The name of the material.
- Material description:

The material's description.
- Status:

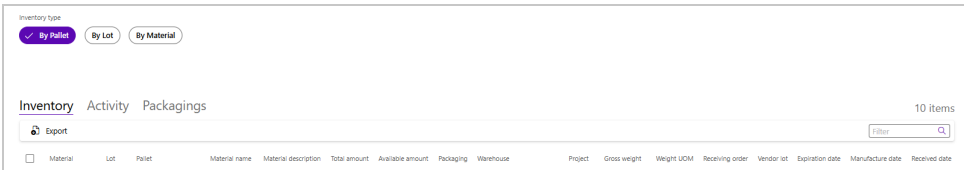
The status of the Material.
- Total amount:

The total amount of inventory in each warehouse listed.
- Available amount:

The amount of inventory available for use in orders.

Incoming amount:	The amount of inventory on incoming purchase orders that has not yet been received.
Packaging:	The packaging level of the inventory in the line.
Warehouse:	The warehouse in which the material is located.
Project:	The project the material is assigned to.
Gross weight:	The total weight of inventory for the material of the line's packaging level, including the packaging.
Weight UOM:	The unit of measurement being used for the weight of the material.

By Pallet



Material:	The lookup code of the material.
Lot:	The Lot the Material is part of.
Pallet:	The License Plate number the Material is assigned to.
Material name:	The name of the material.
Material description:	The material's description.
Total amount:	The total amount of inventory in each warehouse listed.
Available amount:	The amount of inventory available for use in orders.
Packaging:	The packaging level of the inventory in the line.
Warehouse:	The warehouse in which the material is located.
Project:	The project the material is assigned to.
Gross weight:	The total weight of inventory for the material of the line's packaging level, including the packaging.
Weight UOM:	The unit of measurement being used for the weight of the material.
Receiving order:	The inbound receiving order the license plate can in on.
Vendor lot:	The vendor lot the material inventory belongs to.
Expiration date:	The date the lot controlled inventory on the pallet expires.
Manufacture date:	The date the lot controlled inventory on the pallet was manufactured.
Receive date:	The date the lot controlled inventory on the pallet was received in the warehouse.

By Lot

Inventory type

By Pallet

By Lot

By Material

Inventory

Activity

Packagings

Export

4 items

Filter

Material	Lot	Material name	Material description	Total amount	Available amount	Packaging	Warehouse	Project	Vendor lot	Gross weight	Weight UOM	Receiving order	Expiration date	Manufacture date	Received date
----------	-----	---------------	----------------------	--------------	------------------	-----------	-----------	---------	------------	--------------	------------	-----------------	-----------------	------------------	---------------

- Material:

The lookup code of the material.
- Lot:

The Lot the Material is part of.
- Material name:

The name of the material.
- Material description:

The material's description.
- Total amount:

The total amount of inventory in each warehouse listed.
- Available amount:

The amount of inventory available for use in orders.
- Packaging:

The packaging level of the inventory in the line.
- Warehouse:

The warehouse in which the material is located.
- Project:

The project the material is assigned to.
- Vendor lot:

The vendor lot the material inventory belongs to.
- Gross weight:

The total weight of inventory for the material of the line's packaging level, including the packaging.
- Weight UOM:

The unit of measurement being used for the weight of the material.
- Receiving order:

The inbound receiving order the license plate can in on.
- Expiration date:

The date the lot controlled inventory on the pallet expires.
- Manufacture date:

The date the lot controlled inventory on the pallet was manufactured.
- Receive date:

The date the lot controlled inventory on the pallet was received in the warehouse.

Activity

The material **Activity** tab lists the history of actions taken associated with the material.

Inventory

Activity

Packagings

18 items

Filter

ID	Warehouse	Operation code	Status	Material	Lot	Project	Serial number	Expected	Actual	Created date	Completed date	Actual source pallet	Actual target pallet	Notes
982993	Sara-Demo Warehouse	Picking	Completed	SPAT01-LOT	3861	SPatric		1 EA	1 EA	09/24/2025	09/24/2025	SPLP052925_001	SPLP092425_001	
981054	Sara-Demo Warehouse	Picking	Completed	SPAT01-LOT	3861	SPatric		25 EA	25 EA	08/28/2025	08/28/2025	SPLP052925_001	8238	
980043	Sara-Demo Warehouse	Receiving	Completed	SPAT01-LOT	3861	SPatric		25 EA	25 EA	08/11/2025	08/11/2025		12672	

Material Activity tab details

ID:	The system generated ID for the material activity.
Warehouse:	The warehouse in which the material activity took place.
Operation code:	The operation code for the material activity.
Status:	The Status of the material activity.
Material:	The lookup code of the material.
Lot:	The lot of the material inventory associated with the activity.
Project:	The material's project.
Serial number:	If applicable, the serial number of the inventory involved in the activity.
Expected:	The expected amount of the material inventory involved in the activity.
Actual:	The actual amount of the material inventory involved in the activity.
Created date:	The date the activity was created and started.
Completed date:	The date the activity was completed.
Actual source pallet:	The pallet inventory starts on for the activity.
Actual target pallet:	The pallet inventory ends on for the activity.
Notes:	Any notes documented during the activity.

Packagings

The Material **Packagings** tab allows for the Material's Packagings to be setup and edited. Any existing Packagings are listed for review and management.

You can add as many levels of Packaging as are needed.

Note

A Material must have at least one package level - the base package.

If more levels of packaging are needed, add a new row, and then in the **Sub-packaging** field, select the packaging that would go inside the new packaging. In the **Sub-packaging quantity** field, enter the amount of smaller packages that fit inside the new packaging level. Continue this way for as many levels as are needed.

Packaging	Sub-packaging	Sub-packaging quantity	Default	Decimal precision	UPC	Length	Width	Height	UOM	Weight	Shipping weight	UOM	Volume	Shipping volume	UOM	Pallet high	Pallet tie	Shippable container	Autogenerate serials
EA	EA	0	☒			1	1	1	in	1	1	lb	1	1	cu. in.			☐	☐
Case	EA	50	☐			2	3	2	ft	1	1	lb	12	12	cu. ft.			☐	☐

Material Packagings Tab Details

- Packaging:** The packaging detailed in the row.
- Sub-packaging:** If there is a level of packaging level directly below, select that here. For example, there may be multiple "Eaches" (an individual unit) inside a "Box", several of which go inside a "Case".
- Sub-packaging quantity:** The amount of the sub-packaging contained within the row's packaging.
- Default:** When enabled, this package level will be the default level for the material. May be tied to billing or order entry.
- Decimal precision:** Allows the Package to be split into fractions. The **0 decimal places** does not allow splitting, requiring each package to be whole; each subsequent setting (**1 decimal place**, **2 decimal places**, etc.), allows division up to the specified decimal place. For example, the package "Gallon" with the setting of **3 decimal places** could have an inventory of 3.672 Gallons.
- UPC:** Universal Product Code, unique to each level of packaging. Multiple UPC codes can be entered here, each separated by a comma.
- Length:** Length of the package.
- Width:** Width of the package.
- Height:** Height of the package.
- UOM:** Unit of measurement for dimensions. Options include meter, centimeter, foot, and inch.
- Weight:** Weight of the items in this level of packaging
- Shipping weight:** Weight of the items in this packaging, combined with the weight of the packaging itself (Tare Weight).
- UOM:** Unit of measurement for weight. Options include kilogram, gram, pound, ounce, ton, troy ounce, and metric ton.
- Volume:** The Volume of the packaging without any packaging.
- Shipping volume:** Volume of the packaging considering any other factors that may impact the packaging for shipping.
- UOM:** Unit of measurement for volume. Options include cubic meter, cubic centimeter, cubic foot, and cubic inch.
- Pallet high:** How many units high the selected material packaging can be stacked atop itself.
- Pallet tie:** How many units to set down per level on a pallet before stacking.
- Shippable** When enabled, this packaging can be used as an actual shipping

- container:

container, and does not need to be packed further.
- Autogenerate serials:

When enabled, serial numbers will be automatically generated with a sequential serial number when prompted for this packaging level.

***Those in red are required fields.**

Materials Hub > Material SPAT01-LOT

Edit

Material SPAT01-LOT Status Active

SPAT01-LOT

Inventory type

By Pallet

By Lot

By Material

Total available

499

Total base available

744

Total weight

383.3

Inventory

Activity

Packagings

3 items

Export

Filter

Material	Material name	Material description	Total amount	Available amount	Incoming amount	Packaging	Warehouse	Project	Gross weight	Weight UOM
SPAT01-LOT	SPAT01-LOT	SPAT01-LOT	740	420	0	EA	Datex Dry	SPatric	335.658354	kg
SPAT01-LOT	SPAT01-LOT	SPAT01-LOT	5	5	0	Case	Datex Cold	SPatric	2.267962	kg
SPAT01-LOT	SPAT01-LOT	SPAT01-LOT	100	74	0	EA	Sara-Demo Warehouse	SPatric	45.359237	kg

Create a Material

Materials are created at the **Owner** and **Project** level and describe the specific details of your inventory or product.

Create a new material

1. Click the **+ Create material** button. Please note you must have an **Owner** and **Project** selected under the **Filters** section (this should happen by default when you open the page).

The screenshot shows the 'Inventory Hub' interface. At the top, there's a '+ Create material' button. Below it, the 'Filters' section includes 'Inventory type' (with 'By Pallet' selected), 'Inventory date' (set to 09/08/2025), and 'Inventory' (set to 'Activity'). To the right, two summary cards show 'Total available: 258' and 'Total quantity: 398'. Below the filters, a table lists inventory items with columns: ID, Warehouse, Operation code, Status, Material, Lot, Project, Serial number, Expected, Actual, Created date, Completed date, and Actual source. The table contains 47 items, with the first few rows visible.

ID	Warehouse	Operation code	Status	Material	Lot	Project	Serial number	Expected	Actual	Created date	Completed date	Actual source
981559	Sara-Demo Warehouse	Receiving	Completed	SPAT03-LOT	04032025	SPatric	25 EA	25 EA	09/04/2025	09/04/2025		SPLP090425
981556	Sara-Demo Warehouse	Receiving	Completed	SPAT03-LOT	04032025	SPatric	50 EA	25 EA	09/04/2025	09/04/2025		SPLP090425
981061	Sara-Demo Warehouse	Receiving	Completed	SPAT03-LOT	04032025	SPatric	50 Box	50 Box	08/28/2025	08/28/2025		LPSP082825
981054	Sara-Demo Warehouse	Picking	Completed	SPAT01-LOT	3861	SPatric	25 EA	25 EA	08/28/2025	08/28/2025		SPLP082825

The **New material** window will open with a form to create a new material. The selected **Owner** and **Project** will auto-populate with the values from the **Filters** section.

2. In the first section of the form, enter a required short **Material code** that will be used to reference the material, along with a **Description** of the material. You may add an optional **Name** that could also be used as an additional identifier.

Note

The required details are indicated with a red asterisk - all other details are optional and can be filled out, but are not necessary. See the [Materials Guide](#) for more information.

3. Select the **Packaging** the material will be in from the drop down. Please note if you have multiple types of packaging - for example, eaches and cases - you should select the lowest packaging level. You will be able to add additional packaging levels after creating the material. Additionally, you also have the option to add a **UPC code** that will be specific to the selected packaging level.

4. Select a **Group** used to identify groupings of similar materials. "No group" is an out-of-the-box option if you don't plan to utilize the feature.

New material

Confirm

Cancel

Material code *

DEMO-M

Name

Demo Material

Description *

Material used for demos

Owner *

SPatric × ▾

Project *

SPatric × ▾

Packaging *

EA × ▾

UPC code

0015560

Group *

No Group × ▾

Allocation strategy *

FEFO × ▾

5. Select an **Allocation Strategy**. The **Allocation Strategy** takes into account related material information when determining what inventory to select for a shipping order. This allows Inventory to be selected to Ship based on set preferences. For example, First Expired, First Out (FEFO) and First In, First Out (FIFO).

Allocation Strategies

- **FEFO** - First Expired, First Out. Lot controlled inventory whose expiration dates are nearest are assigned to orders.
- **FIFO** - First In, First Out. The inventory that was received to the warehouse first is selected for orders before newer inventory.
- **FMFO** - First Manufactured, First Out. The Inventory that were originally manufactured first is assigned to orders before newer materials.
- **LEFO** - Last Expired, First Out. The inventory whose expiration dates are furthest away are assigned to orders.

By selecting which option you would prefer here, the system automatically utilizes the information selected here when determining inventory to pick and ship for orders.

Tip

Expiration driven strategies will only work when the inventory is lot controlled.

New material

Confirm

Cancel

Material code *

DEMO-M

Name

Demo Material

Description *

Material used for demos

Owner *

SPatric × ▾

Project *

SPatric × ▾

Packaging *

EA × ▾

UPC code

0015560

Group *

No Group × ▾

Allocation strategy *

FEFO × ▾

6. To track inventory for this material by individual lots, check the **Lot controlled** option.

7. If the inventory for the material is to be serial controlled or utilize serial numbers for tracking check the **Serial controlled** option.

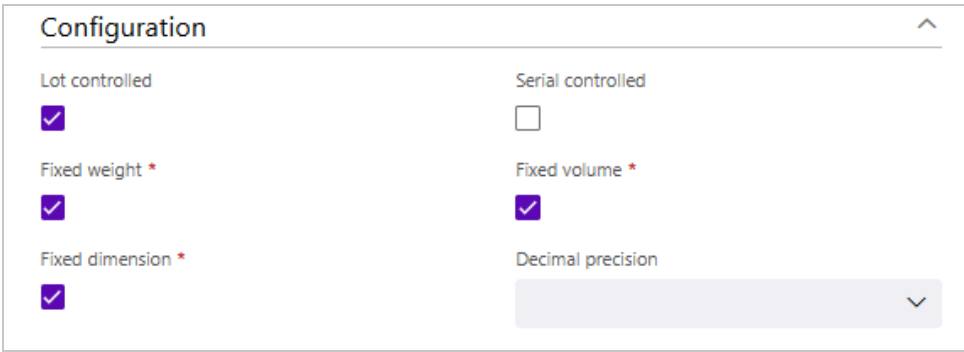
If tracking of lots/serial numbers is not required, leave both toggles off. In such cases inventory for the lot will be assigned a Generic Lot, or GLot and not utilize serial numbers.

If tracking both lots and serial numbers/custom fields, toggle on both options.

8. Select the appropriate "Fixed" box if the product weight, volume, and/or dimension will remain the same. Optionally, set the **Decimal precision** of these measurements.

Warning

Once you have inventory for this material in the system you will not be able to change these values, so be certain of the whether or not the material will be lot and/or serial controlled and will have a fixed weight or volume.



The Configuration dialog box is titled "Configuration" and has a close button (X) in the top right corner. It contains two columns of settings. The left column has "Lot controlled" with a checked checkbox, "Fixed weight *" with a checked checkbox, and "Fixed dimension *" with a checked checkbox. The right column has "Serial controlled" with an unchecked checkbox, "Fixed volume *" with a checked checkbox, and "Decimal precision" with a dropdown menu showing a downward arrow.

Configuration	Serial controlled
Lot controlled ☒	☐
Fixed weight * ☒	Fixed volume * ☒
Fixed dimension * ☒	Decimal precision

9. If the material has a **Fixed weight**, specify the **Weight** (weight before additional shipping packaging) and **Shipping weight** (total weight), then select the **Weight measure**.

10. If the material has a **Fixed volume**, specify the **Volume** (weight before additional shipping packaging) and **Shipping volume** (total volume), then select the **Volume measure**.

11. If the material has a **Fixed dimensions**, specify the material's **Length**, **Width**, and **Height**, then select the **L x W x H Measure**.

Weight *	1.00	Shipping weight *	1.00
Weight measure *	lb × ▾	Volume *	1.00
Shipping volume *	1.00	Volume measure *	cu. in. × ▾
Length *	1.00	Width *	1.00
Height *	1.00	L x W x H measure *	in × ▾

12. (Optional) Enter the **Pallet High** and **Pallet Tie**.

Pallet High is how many units high the package can be stacked atop itself, while the **Pallet Tie** is how many units to set down per level before stacking.

13. (Optional) If the material is lot controlled, you may set the material's **Shelf Life** (how many days before the lot controlled material expires).

14. (Optional) Select a **Storage Category Rule** which can be used to determine where in a warehouse inventory for this material can and cannot be stored.

Pallet high	Pallet tie
Shelf life (in days)	Storage category rule
0	▾

15. Once all fields are set, return to the top of the window and click the **Confirm** button.

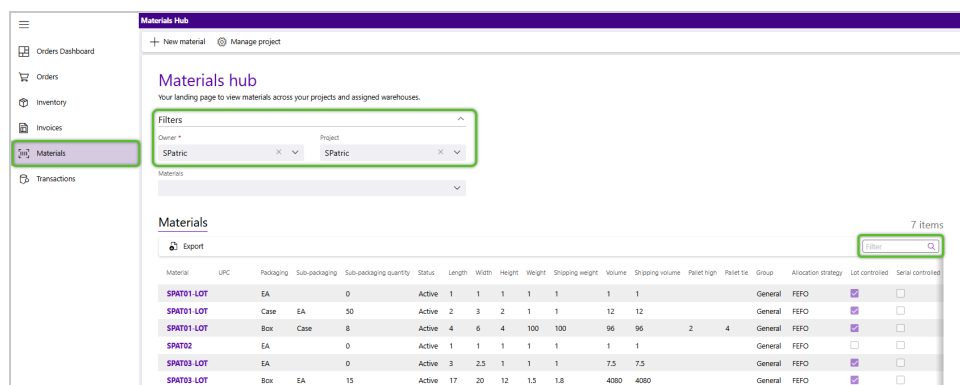
Once a Material has been created edits can still be made, however once inventory has been added for the material, **Lot controlled**, **Serial controlled**, **Fixed weight**, **Fixed volume**, and **Fixed dimensions** cannot be changed.

Edit a material

If you possess the needed permissions for Footprint Portal, you can make some limited edits to an existing material. Certain options, such as whether or not it was lot controlled or fixed weight, can't be changed if there is any inventory for the material in or coming into the warehouse. Packaging levels can also be added to a material record if there are multiple, and their dimensions updated.

Access a material record

Option A, Step 1: Open the **Materials hub**. If the material you're looking for is not immediately visible in the grid, input the material's lookup code in the search field on the top right corner of the Materials grid then either click the Tab key or click outside of the field. The material will be



Option A, Step 2. If you have access to more than one owner and/or project, ensure the **Owner** and **Project** set are the combination the material is assigned to. If not you may need to clear the fields and set to the required owner and project.

Option A, Step 3. If the material you're looking for is not immediately visible in the grid, input the material's lookup code in the search field on the top right corner of the **Materials** grid then either click the Tab key on your keyboard or click outside of the field. The grid will be filtered to contain all records matching the value you entered.

Option B: Click on the material's lookup code in any grid where it appears as a hyperlink. This isn't just limited to the **Materials** hub. You may find such hyperlinks in orders and the **Inventory** hub.

The screenshot shows the 'Inventory Hub' interface. At the top, there are tabs for 'Create material', 'Lots hub', and 'Serials hub'. Below this, the 'Inventory hub' section displays 'Your landing page to view inventory across your projects and assigned warehouses.' On the right, two large boxes show 'Total available: 253' and 'Total quantity: 394'. Below these, there are filters for 'Inventory type' (By Pallet, By Lot, By Material) and 'Inventory date' (10/08/2025). The main section is titled 'Inventory' and 'Activity', with a '3 items' indicator. An 'Export' button is visible. A table lists inventory items with columns: Material, Material name, Material description, Total amount, Available amount, Incoming amount, Packaging, Warehouse, Project, Gross weight, and Weight UOM. The first row, 'SPAT01-LOT', is highlighted with a green box around the lookup code.

Material	Material name	Material description	Total amount	Available amount	Incoming amount	Packaging	Warehouse	Project	Gross weight	Weight UOM
SPAT01-LOT	SPAT01-LOT	SPAT01-LOT	96	70	0	EA	Sara-Demo Warehouse	SPatric	43.544868	kg
SPAT03-LOT	SPAT03-LOT	SPAT03-LOT	200	100	0	EA	Sara-Demo Warehouse	SPatric	90.718474	kg
SPAT03-LOT	SPAT03-LOT	SPAT03-LOT	98	83	0	Box	Sara-Demo Warehouse	SPatric	80.013694	kg

Edit a material

1. In the material record, click the **Edit** button to open the Edit material flyout.

The screenshot shows the 'Materials Hub' interface for 'Project SPatric' and 'Material SPAT01-LOT'. At the top, there is an 'Edit' button highlighted with a green box. Below this, the 'Material SPAT01-LOT Status Active' section displays 'SPAT01-LOT'. Under 'Inventory type', there are buttons for 'By Pallet', 'By Lot', and 'By Material' (selected). Below this, there are tabs for 'Inventory', 'Activity', and 'Packagings'. An 'Export' button is visible. A table lists inventory items with columns: Material, Material name, Material description, Total amount, Available amount, and Incoming amount. The first row, 'SPAT01-LOT', is highlighted with a green box around the lookup code.

Material	Material name	Material description	Total amount	Available amount	Incoming amount
SPAT01-LOT	SPAT01-LOT	SPAT01-LOT	740	420	0
SPAT01-LOT	SPAT01-LOT	SPAT01-LOT	5	5	0

2. Edits can be made to most of the fields with the exception of the **Lot controlled**, **Serial controlled**, **Fixed weight**, and **Fixed dimension**. If there is inventory for the material in the warehouse or expecting in the warehouse on an incoming receiving order these fields cannot be updated until there is no inventory. If changes have to be made you may need to work with the warehouse to perform an inventory transformation on the existing inventory.

3. Once you've completed all the edits required, click the **Confirm** button.

Edit material [X]

Confirm Cancel

Material code: SPAT01-LOT Name: SPAT01-LOT

Description: SPAT01-LOT

Material group: General [X] [v] Status: Active [X] [v]

☒ Lot controlled ☐ Serial controlled

☒ Fixed weight ☒ Fixed dimension

Storage category rule: [v]

Add a packaging level

1. In the material record, click the **Packagings** tab.

The screenshot shows the 'Material SPAT01-LOT Status Active' record. At the top, there are three summary cards: 'Total available' with value 495, 'Total base available' with value 740, and 'Total weight' with value 381.5. Below these, there are tabs for 'Inventory', 'Activity', and 'Packagings'. The 'Packagings' tab is selected and highlighted with a green box. Below the tabs, there is a table with columns: Packaging, Sub-packaging, Sub-packaging quantity, Default, Decimal precision, UPC, Length, Width, Height, UOM, Weight, Shipping weight, UOM, Volume, Shipping volume, UOM, Pallet high, Pallet tie, Shippable container, and Autogenerated. The table has two rows: one for 'EA' with a quantity of 0 and a checked 'Default' box, and another for 'Case' with a quantity of 50 and an unchecked 'Default' box. At the bottom left, there is a green '+ Add row' button.

2. Click the **+Add row** button.

3. Select the **Packaging** name from the drop down. These are pre-populated values. If the one you are looking for is not available you may need to contact the warehouse to have it added.

4. After selecting the packaging identify the packaging level for the material that is directly below the new level from the **Sub-packaging** drop down, and indicate the amount of that packaging that would be inside in the **Sub-packaging quantity**.

This close-up screenshot shows the 'Packagings' tab of the material record. It highlights the process of adding a new row. The 'Packaging' dropdown is set to 'Box', the 'Sub-packaging' dropdown is set to 'Case', and the 'Sub-packaging quantity' is set to 8. The 'Default' checkbox is unchecked. A green box highlights the 'Box', 'Case', and '8' fields. Below the table, there is a green '+ Add row' button with a green arrow pointing to it.

5. (Optional): Set **Decimal precision** for values of this packaging level and the **UPC** (Universal Product Code) for this specific packaging level of the material.

6. If the material has set measurement values (weight, volume, and dimensions) provide the values for each as applicable.

Decimal precision	UPC	Length	Width	Height	UOM	Weight	Shipping weight	UOM	Volume	Shipping volume	UOM
		1	1	1	in	1	1	lb	1	1	cu. in.
		2	3	2	ft	1	1	lb	12	12	cu. ft.
		4.00	6.00	4.00	ft	100.00	100.00	lb	96.00	96.00	cu. ft.

7. (Optional): Enter a **Pallet high** (how high this material packaging level can be stacked) and **Pallet tie** (how many packages of this level can fit on a pallet before stacking).

8. (Optional): Select if this is a **Shippable container** (it can be shipped without being packed), or if the material was serial controlled if this packaging level should **Autogenerate serials**.

9. Click the check mark at the end of the row to save the new packaging.

Pallet high	Pallet tie	Shippable container	Autogenerate serials
		☐	☐
		☐	☐
2	4	☐	☐

...
☒

Edit a packaging level

1. In the material record, click the **Packagings** tab.

The screenshot shows the 'Material SPAT01-LOT Status Active' record. The 'Packagings' tab is selected and highlighted with a green box. The record displays three summary cards: 'Total available' (495), 'Total base available' (740), and 'Total weight' (381.5). Below these, the 'Inventory' section shows a table with 2 items. The 'Packaging' column is highlighted, and the 'Case' row is selected.

Packaging	Sub-packaging	Sub-packaging quantity	Default	Decimal precision	UPC	Length	Width	Height	UOM	Weight	Shipping weight	UOM	Volume	Shipping volume	UOM	Pallet high	Pallet tie	Shippable container	Autogenerate
EA		0	☒			1	1	1	in	1	1	lb	1	1	cu. in.			☐	☐
Case	EA	50	☐			2	3	2	ft	1	1	lb	12	12	cu. ft.			☐	☐

2. Click on the row for the packaging you wish to edit. The row will become editable and you can make your changes with the exception of the **Packaging**, **Sub-packaging**, and **Sub-packaging quantity** fields.

3. Once you've completed all your changes, click the check mark at the end of the row.

The screenshot shows the 'Material SPAT01-LOT Status Active' record with the 'Packagings' tab selected. The 'Case' row is highlighted in blue, indicating it is the selected row for editing. The 'Case' row is now editable, with the 'Sub-packaging' field set to 'EA' and the 'Sub-packaging quantity' field set to '50'. The 'Case' row is highlighted in blue, and the 'Check' button (a green checkmark) is visible at the end of the row.

Packaging	Sub-packaging	Sub-packaging quantity	Default	Decimal precision	UPC	Length	Width	Height	UOM	Weight	Shipping weight	UOM	Volume	Shipping volume	UOM	Pallet high	Pallet tie	Shippable container	Autogenerate
EA		0	☒			1	1	1	in	1	1	lb	1	1	cu. in.			☐	☐
Case	EA	50	☐			2.00	3.00	2.00	ft	1	1	lb	12	12	cu. ft.			☐	☐
Box	Case	8	☐			4	6	4	ft									☐	☐

Invoices guide

Sections

- [Overview](#)
- [Invoice hub](#)
- [Invoice record](#)

Overview

The Invoices hub is generally used for reference and communication on invoices from Footprint Portal to the warehouse's Footprint WMS.

While there is little in the way of management to be handled from the portal-side, the Invoices hub is useful to view invoices and communicate on specific invoices from within the application.

Invoices hub

Invoices are itemized lists of services with their prices and terms. Invoices in Footprint Portal are made up of billing records that were generated when certain activities occurred based on an active contract.

The **Invoices hub** lists all **Completed** and **Exported** invoices for review, discussion, and print. Invoices can be filtered by **Owner**, **Project**, and **Status**.

The **Invoices tab** displays invoices in descending order, starting with the most recently created. This can also be filtered by using the **Created from:** and **Created to:** settings at the top of the grid. The Invoices tab toolbar provides the option to [print a selected invoice](#).

Invoices tab details

Invoice:	The invoice number (code).
Status:	The status of the invoice.
Owner:	The name of the owner the invoice is for.
Project:	The name of the project the invoice is for.
Created:	The date and time when the invoice was created.
Due date:	The date and time when the invoice payments are due.
Reference:	Any reference number independent of the invoice code.
Attention of:	If there is a specific individual in an organization that should be viewing the invoice they'll be identified here.
Notes:	Any notes added to the invoice.

Invoices

The Invoice can be opened for further review and communication by clicking the invoice hyperlink.

Icons in the top toolbar provide options to [print the invoice](#) or [add a comment to the invoice's discussion](#).

Invoice header and details

The invoice's basic information will be displayed in the header. The **Details** section can be opened for more information about the invoice.

Invoice code:	The Invoice number (code).
Type:	The type of the invoice.
Owner:	The name of the owner the invoice is for.
Project:	The name of the project the invoice is for.
Status:	The status of the invoice.
Invoice terms:	The terms of the invoice.
Due:	The date and time when the invoice payments are due.
Created:	The date and time when the invoice was created.
Reference:	Any reference number beyond the invoice code for the invoice.

Attention Of: If there is a specific individual in an organization that should be viewing the invoice they'll be identified here.

Notes: Any notes to be added to the invoice.

Invoice Lines tab details

In the **Invoice Lines** tab, the invoice line details are displayed. The associated billing record(s) for a given invoice line can be viewed by clicking the arrow icon at the start of the row to expand it.

#	Billing code	Amount	Rate	Total	Billing records	Notes	Description
1	Return Monitoring (15° to 25° Celsius)	0.01504629	40.8	40.83	1	Generated from Billing Record [515392] Minimum Charge is in effect.	
	Amount	UOM	Rate	Minimum charge	Total	Details	Created
	0.01504629	cu. ft.	40.8	40.8	40.8	Warehouse Datex Pharma Pallet 02032502 Material BVTEST01 Lot 00000M6.1BR	02/09/2025, 3:30 PM

Invoice Lines tab details

Note

Invoice Lines are rounded according to the standard for financial applications, commonly referred to as "**Bankers Rounding**."

#: The invoice line number.

Billing Code: The name of the billing code the invoice line is using.

Amount: The number of units of work performed for the invoice line.

Rate: The rate at which the units of work are charged for the invoice line.

Total: The total charge for the invoice line.

Billing Records: The number of billing records comprising the invoice line.

Notes: Any notes in the system about the invoice line.

Description: A description of the billing code used.

Billing record details

Amount: The number of units of work performed for the billing record.

UOM: The unit of measure by which this billing record is charging.

Rate: The rate at which the units of work are charged for the billing record.

Minimum charge: If a minimum charge has been set in the contract line associated with this billing record, it is displayed here.

- Total:

The total charge for the invoice line.
- Details:

The warehouse, material, and order number associated with the billing record, when applicable.
- Created:

The date and time when the billing record was created.
- Notes:

Any notes in the system about the invoice line.

Invoices Hub

Invoices hub

Your landing page to view invoices across your projects and assigned warehouses.

Filters

Invoices

2 items

Created from:

Created to:

Filter

	Invoice	Status	Owner	Project	Created	Due date	Reference	Attention of	Notes
	733	Completed	Datex Pharma	Datex Pharma	04/24/2025, 9:29 PM	05/25/2025, 12:00 AM			Invoice Completed on 04/24/25 9:34 PM by jhogue Invoice C
	716	Completed	Datex Pharma	Datex Pharma	02/09/2025, 3:30 PM	03/11/2025, 12:00 AM	Datex Pharma-4		Invoice Completed on 03/05/25 4:38 PM by mframpton null

Invoices Hub > Invoice 716

Invoice code *

716

Type *

Invoice

Owner *

Datex Pharma

Project *

Datex Pharma

Status

Completed

Invoice terms *

30 day invoice

Total units

1.2K

Total billed

\$144.8K

Details

Due date

03/11/2025, 12:00 AM

Created date

02/09/2025, 3:30 PM

Reference

Datex Pharma-4

Attention of

Notes

Invoice Completed on 03/05/25 4:38 PM by mframpton null

Invoice Lines

1524 items

#

Billing code

Amount

Rate

Total

Billing records

Notes

Description

>	1	Return Monitoring (15° to 25° Celsius)	0.01504629	40.8	40.83	1	Generated from Billing Record [515392] Minimum Charge is in effect.	
>	2	Return Monitoring (15° to 25° Celsius)	0.01446759	40.8	40.83	1	Generated from Billing Record [515393] Minimum Charge is in effect.	
>	3	Return Monitoring (15° to 25° Celsius)	0.02951388	40.8	40.83	1	Generated from Billing Record [515394] Minimum Charge is in effect.	
>	4	Return Monitoring (15° to 25° Celsius)	0.02951388	40.8	40.83	1	Generated from Billing Record [515395] Minimum Charge is in effect.	
>	5	Return Monitoring (15° to 25° Celsius)	0.02951388	40.8	40.83	1	Generated from Billing Record [515396] Minimum Charge is in effect.	
>	6	Return Monitoring (15° to 25° Celsius)	0.05902777	40.8	40.83	1	Generated from Billing Record [515397] Minimum Charge is in effect.	
>	7	Return Monitoring (15° to 25° Celsius)	0.02951388	40.8	40.83	1	Generated from Billing Record [515398] Minimum Charge is in effect.	
>	8	Return Monitoring (15° to 25° Celsius)	0.02951388	40.8	40.83	1	Generated from Billing Record [515399] Minimum Charge is in effect.	

Portal Transaction hub guide

Sections

- [Overview](#)
- [Transactions hub](#)

Overview

From the **Transactions hub**, you can review the history of inventory transactions for your goods. You will only be able to view transactions for inventory you have access to.

If the transaction in the grid is a type involving an order, its record can be opened by clicking its lookup code hyperlink in the table

Transactions hub

The Transaction hub is where you can review actions taken that result in the change of inventory levels in the warehouse.

Filter options are available to specify the transactions you'd like to see. You may filter by **Owner**, **Project**, **Materials**, **Warehouse**, **Created from**, **Created to**, and **Operations codes**.

A note on operation codes - these are the types of transactions you maybe view. These include creating inventory, adjusting inventory, receiving inventory, and picking inventory.

Data displayed can be **exported**. Expand the sections below for more details.

Transactions tab

The **Transactions tab** lists all transactions associated with the filters set for the hub (**Owner**, **Project**, **Materials**, **Warehouse**, **Created from**, **Created to**, and **Operations codes**). The **Transactions tab** toolbar also provides the option to **export the transaction data displayed in the tab**.

Transactions																	10 items
Export																	
Order	Material	Operation code	Description	Created	Completed	Project	Owner reference	PO	Qty	Lot	Vendor lot	Recv date	Source	Target	Warehouse	Destination name	Destination line 1
8174	SHW01-LCT	Receiving	SHW01-LCT	06/11/2025	06/11/2025	SHW01			25	04010025	05000025	04/05/2025	SDW01	SDW01	Sara Demo Warehouse		
8174	SHW01-LCT	Receiving	SHW01-LCT	06/11/2025	06/11/2025	SHW01			25	04010025	05000025	04/05/2025	SDW01	SDW01	Sara Demo Warehouse		
8175	SHW01-LCT	Receiving	SHW01-LCT	06/11/2025	06/11/2025	SHW01			25	04010025	05000025	04/05/2025	SDW01	SDW01	Sara Demo Warehouse		
8175	SHW01-LCT	Receiving	SHW01-LCT	06/11/2025	06/11/2025	SHW01			25	04010025	05000025	04/05/2025	SDW01	SDW01	Sara Demo Warehouse		
8238	SHW01-LCT	Picking	SHW01-LCT	06/08/2025	06/08/2025	SHW01	REF00000025	VREF-000025	25	04010025	05000025	04/05/2025	SDW01	SDW01	Sara Demo Warehouse	Joe Smith	3300 North St
																Tampa	33047
																	United States

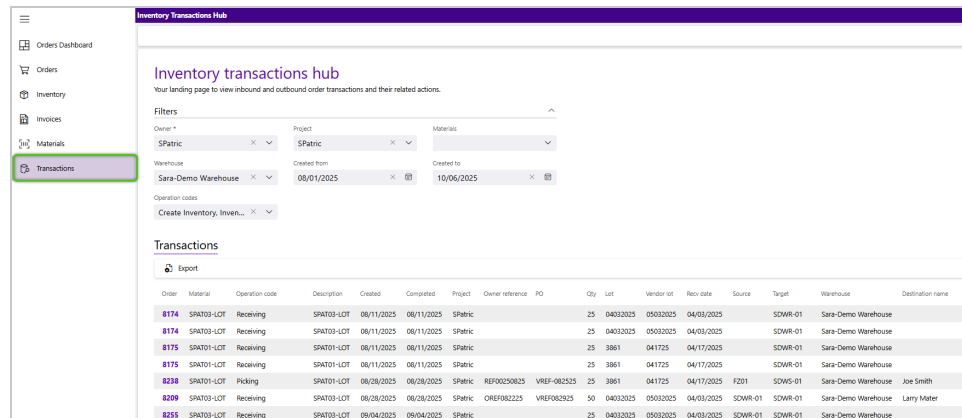
Transaction tab details

- Order:** The order lookup code, if any, associated with the transaction
- Material:** The lookup code of the material involved in the transaction.
- Operation code:** The transaction's operation code identifying what kind of activity this is.
- Description :** The description of the material involved in the transaction.
- Created:** The date and time the transaction was created, likely, but not always, when it started.
- Completed:** The date and time the transaction was finished.
- Project:** The name of the project associated with the material inventory involved in the transaction.
- Owner reference:** The reference number given to the order for the owner's reference.
- PO:** The reference number given to the vendor for the vendor's reference.
- Qty:** The amount of inventory involved in the transaction. This may be a negative number in the case of adjustments.
- Lot:** The lot of the inventory involved in the transaction.
- Vendor lot:** The vendor lot of the inventory involved in the transaction.
- Recv Date:** The date the inventory involved was first received into the warehouse.

- Source:** The location in the warehouse the transaction started from.
- Target:** The location in the warehouse the transaction ended at.
- Warehouse:** The warehouse where the transaction activity took place.
- Destination name:** If the transaction was part of an order with a contact, this is the contact's first and last name.
- Destination line 1:** If the transaction was part of an order with a contact, this is the contact's first address line.
- Destination line 2:** If the transaction was part of an order with a contact, this is the contact's additional address line.
- Destination city:** If the transaction was part of an order with a contact, this is the contact's address city.
- Destination postal code:** If the transaction was part of an order with a contact, this is the contact's address zip code.
- Destination country:** If the transaction was part of an order with a contact, this is the contact's address country.

Transaction tab toolbar buttons

Export: Export data displayed in the grid.



Inventory transactions hub

Your landing page to view inbound and outbound order transactions and their related actions.

Filters

Owner: SPhatic Project: SPhatic Materials: [Dropdown]

Warehouse: Sara-Demo Warehouse Created from: 06/01/2025 Created to: 10/06/2025

Operation codes: Create Inventory, Inven... [Dropdown]

Transactions

Export

Order	Material	Operation code	Description	Created	Completed	Project	Owner reference	PO	Qty	Lot	Vendor lot	Recv date	Source	Target	Warehouse	Destination name
8174	SPAT03-L0T	Receiving	SPAT03-L0T	06/11/2025	06/11/2025	SPhatic			25	04033025	05032025	04/03/2025	SCWR-01		Sara-Demo Warehouse	
8174	SPAT03-L0T	Receiving	SPAT03-L0T	06/11/2025	06/11/2025	SPhatic			25	04033025	05032025	04/03/2025	SCWR-01		Sara-Demo Warehouse	
8175	SPAT01-L0T	Receiving	SPAT01-L0T	06/11/2025	06/11/2025	SPhatic			25	3861	041725	04/17/2025	SCWR-01		Sara-Demo Warehouse	
8175	SPAT01-L0T	Receiving	SPAT01-L0T	06/11/2025	06/11/2025	SPhatic			25	3861	041725	04/17/2025	SCWR-01		Sara-Demo Warehouse	
8238	SPAT01-L0T	Picking	SPAT01-L0T	06/08/2025	06/08/2025	SPhatic	REF0050825	VREF-082525	25	3861	041725	04/17/2025	F201	SCWR-01	Sara-Demo Warehouse	Joe Smith
8209	SPAT03-L0T	Receiving	SPAT03-L0T	06/08/2025	06/08/2025	SPhatic	OREF08225	VREF082525	50	04033025	05032025	04/03/2025	SCWR-01	SCWR-01	Sara-Demo Warehouse	Larry Mater
8255	SPAT03-L0T	Receiving	SPAT03-L0T	06/04/2025	06/04/2025	SPhatic			25	04033025	05032025	04/03/2025	SCWR-01	SCWR-01	Sara-Demo Warehouse	