datex
Engineered for Easy™

www.datexcorp.com

Datex Footprint WMS

Customer Portal User Manual

Table of Contents

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

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**.

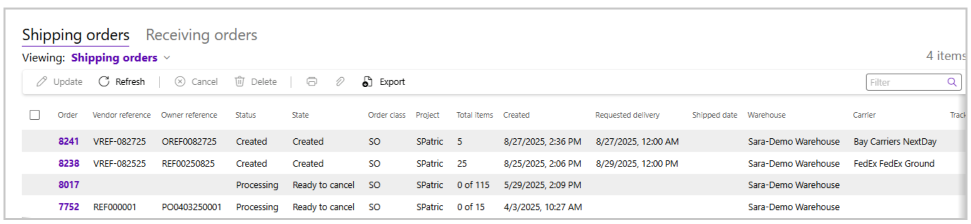
Search and filter options are available to quickly locate orders for review and management. Users can filter by Owner, Project, Material, Warehouse, Status, Reference, and Create Date ranges.

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**.



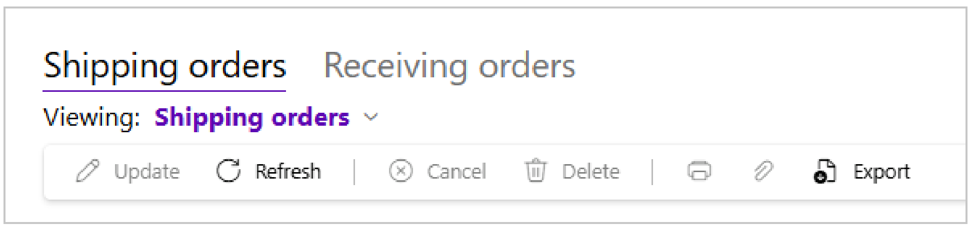
Shipping order information

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

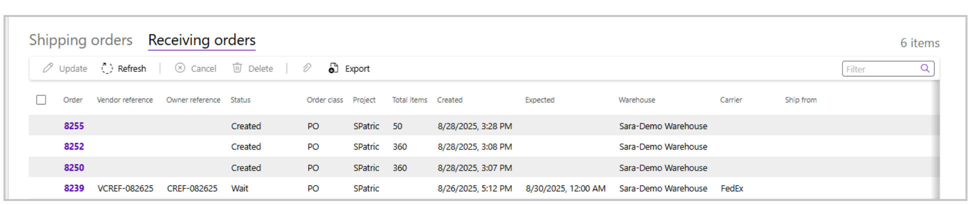
The **Orders** tab toolbar provides options to manage selected Shipping orders, such as **Cancel**, **Delete**, **Add Attachments**, and more.



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.

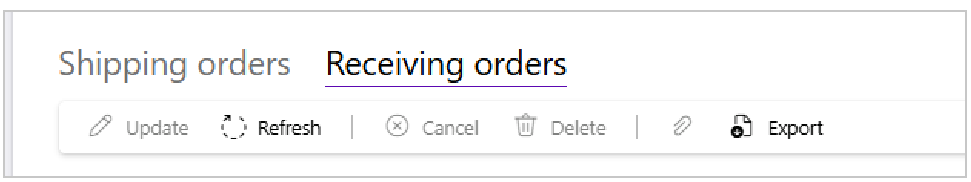


Receiving order information

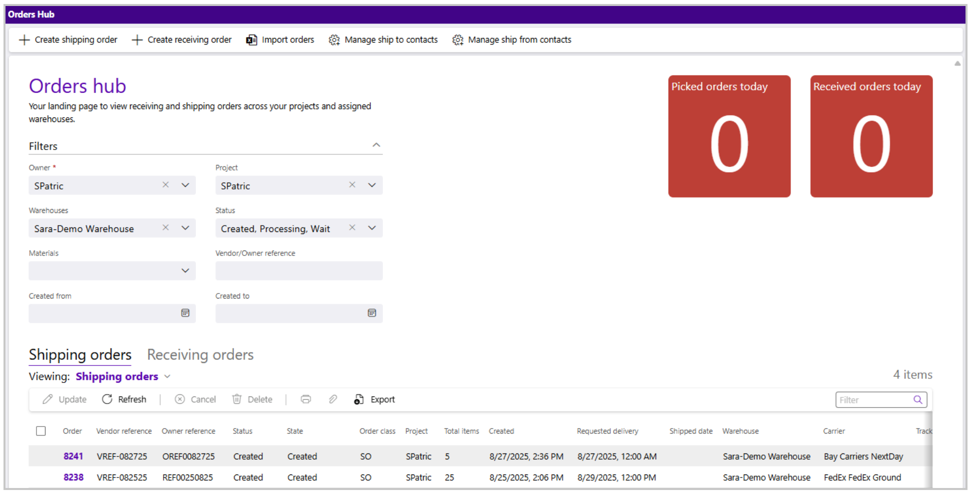
Order:	The lookup number for the order.
Vendor reference:	The reference number given to the vendor for the vendor's reference.
Owner reference:	The reference number given to the order for the owner's reference.
Status:	The current status of the order.
Order class:	The order class the order has been assigned 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).



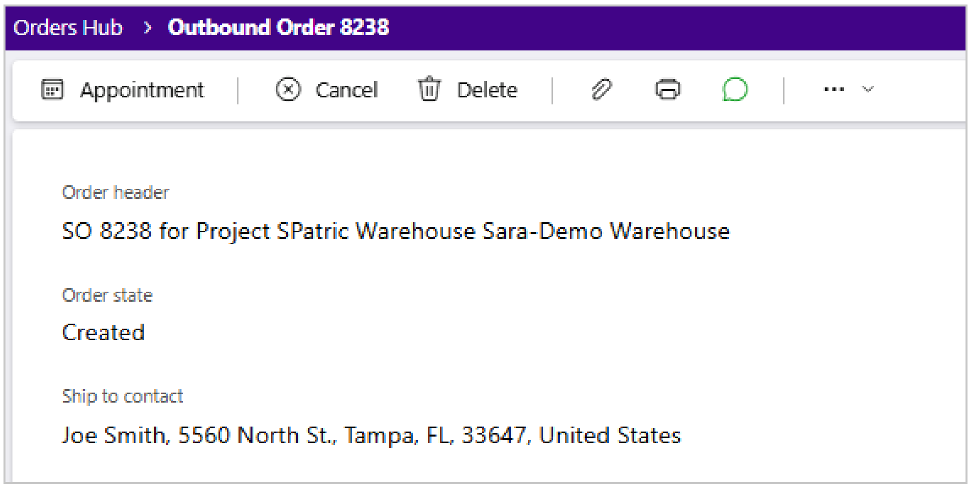
Shipping order

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.

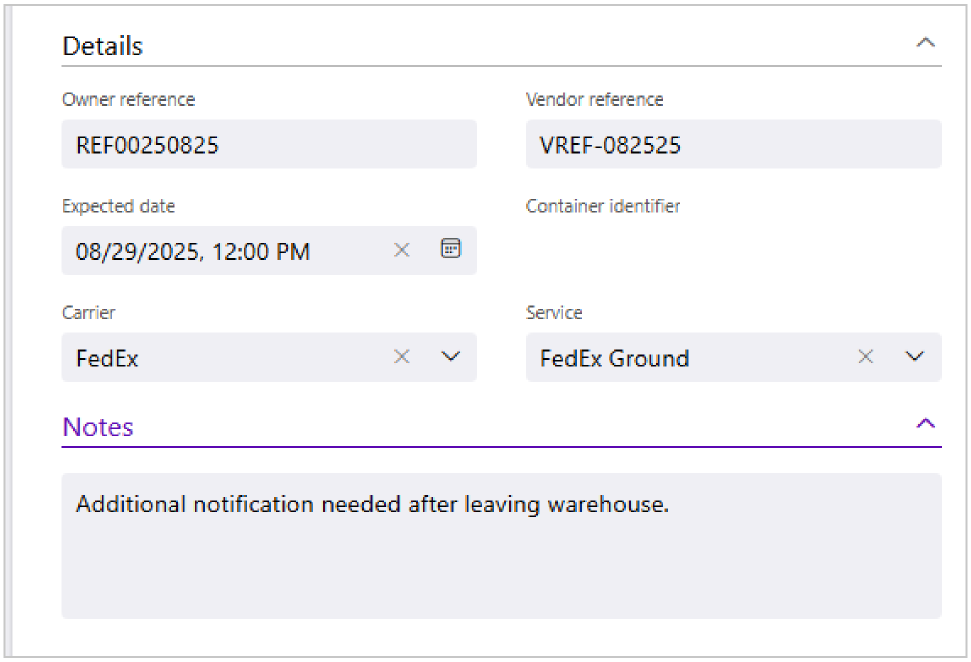
Shipping order details



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.

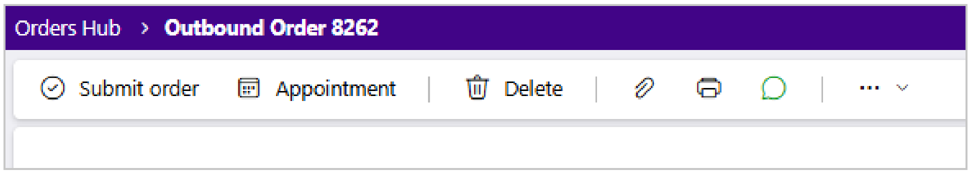
Ship from contact: This is the address associated with the order. Only visible when a Contact has been added or selected.



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.

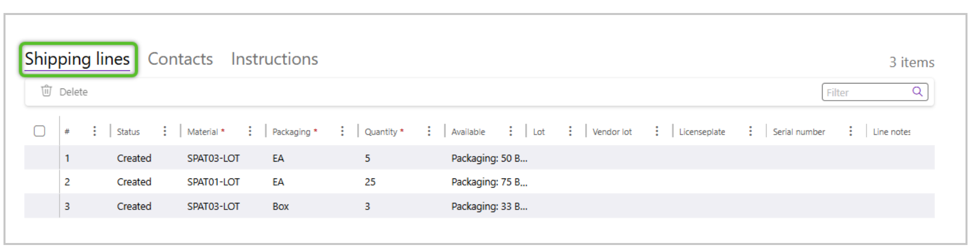
Options... Dropdown: The Shipping order **...** dropdown button opens to provides the ability to **review the history of auto-emailed reports** and associate a Ship to address to the order.

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.

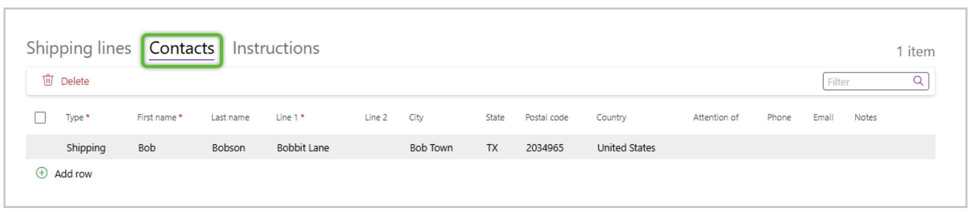


Shipping line information

#: 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.

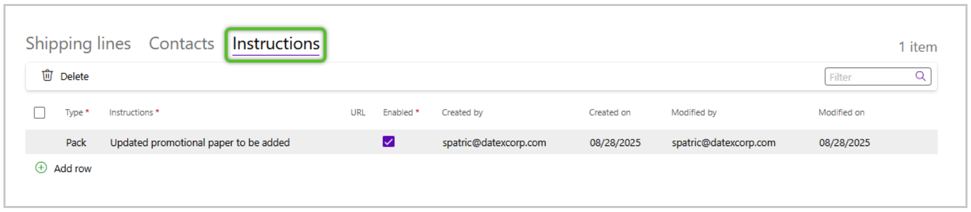


Contacts information

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.

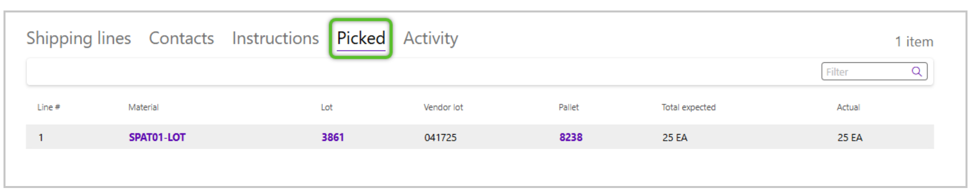


Instructions Information

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.



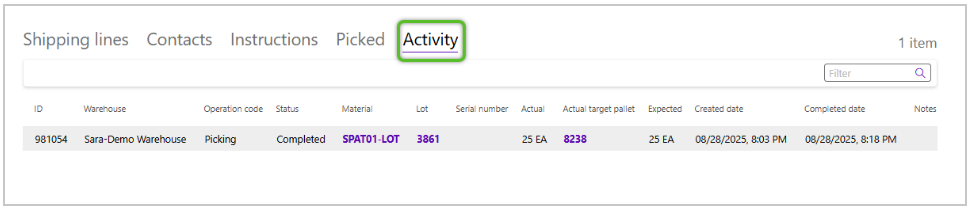
Picked information

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.

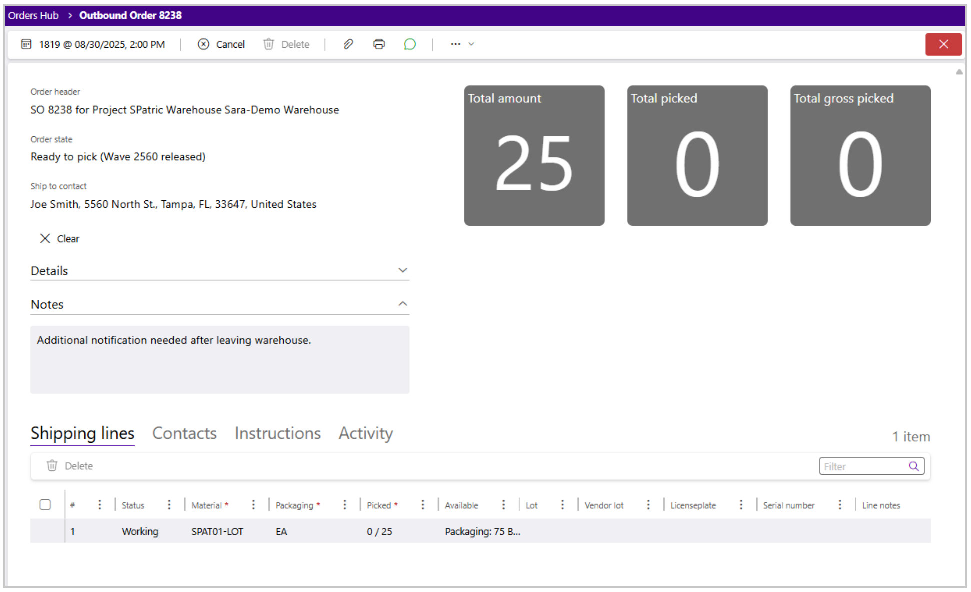
Activity

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



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.



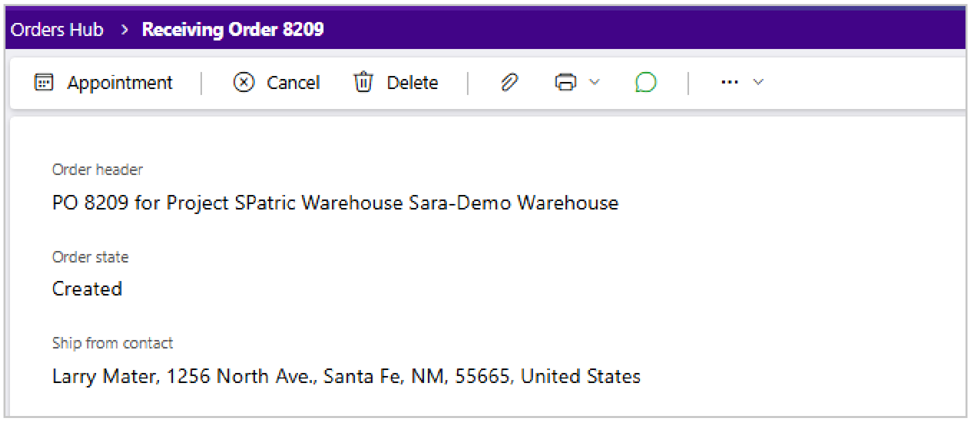
Receiving order

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

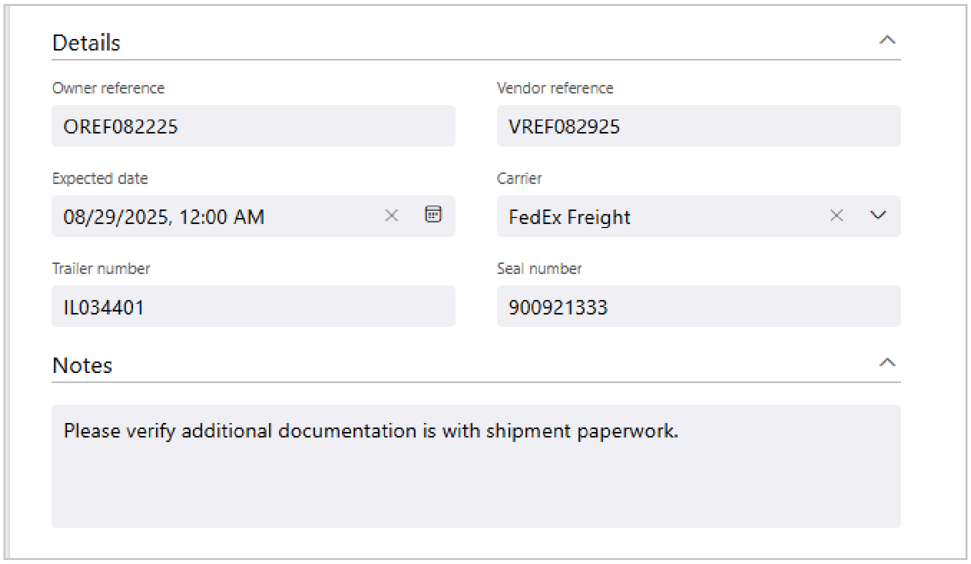
The Receiving order's basic information will be displayed, including the **Order number**, **Order class**, **Project**, **Warehouse**, and **Order status**. The **Details** section can be opened for more information about the order.

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



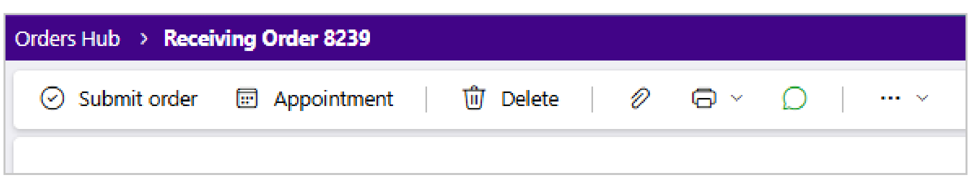
Order header:	The short name of the Order Class assigned to the order, the system-generated Order Lookup, followed by the Project associated with the order and the Warehouse to order will arrive at.
Order state:	The current status of the order dependent on where in the inbound handling process the order is at.
Ship from contact:	This is the address associated with the order. Only visible when a Contact has been added or selected.



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.

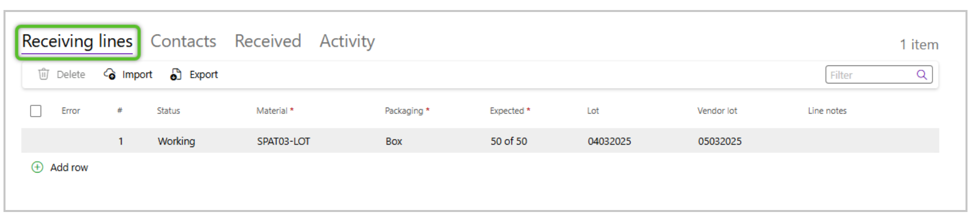
Options... Dropdown: The Shipping order **...** dropdown button opens to provides the ability to review the history of auto-emailed reports, and associate a Ship to address to the order.

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.



Shipping line information

#: The Receiving Line Number.

Status: The Status of the receiving line.

Material: The Material in the receiving line.

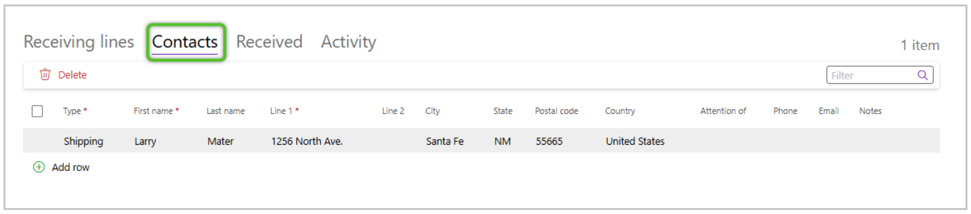
Packaging: The Packaging UOM of the material in the receiving line.

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.

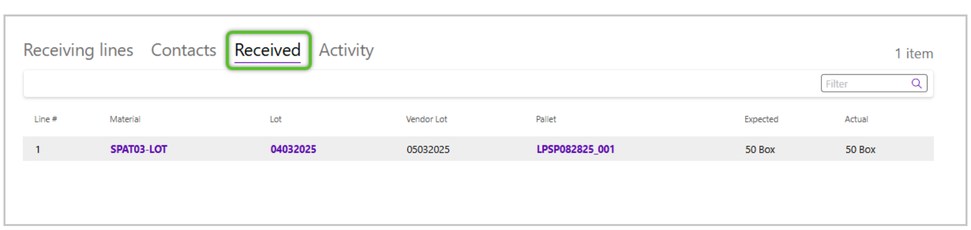


Contacts information

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.

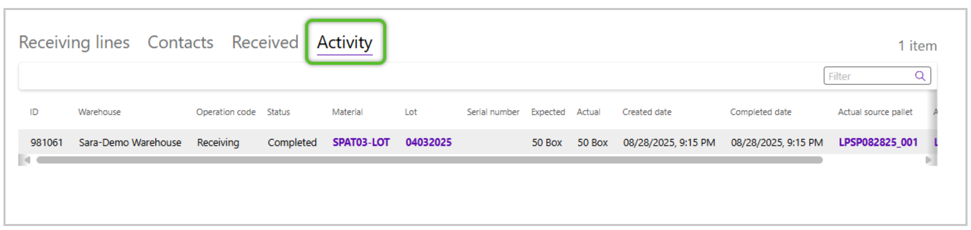


Received information

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

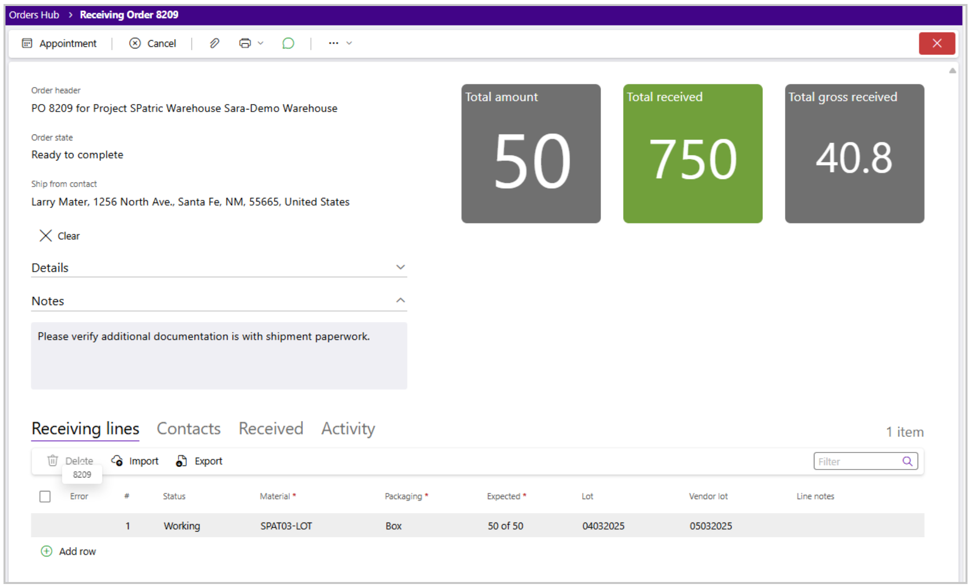
The **Activity** tab displays the order's task history in the warehouse, including details such as material, user, completed date and more.



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.

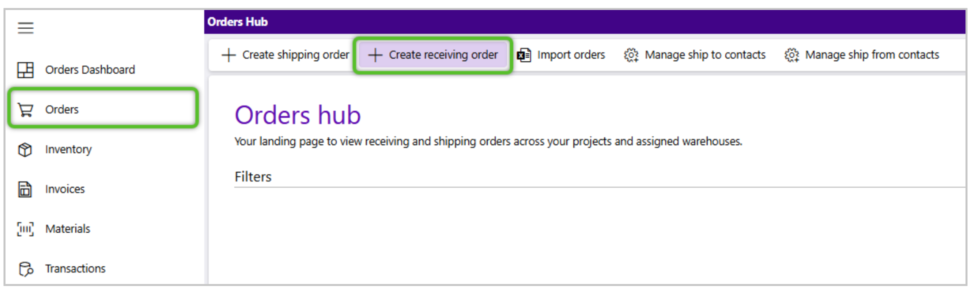


Create and submit a Receiving order

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

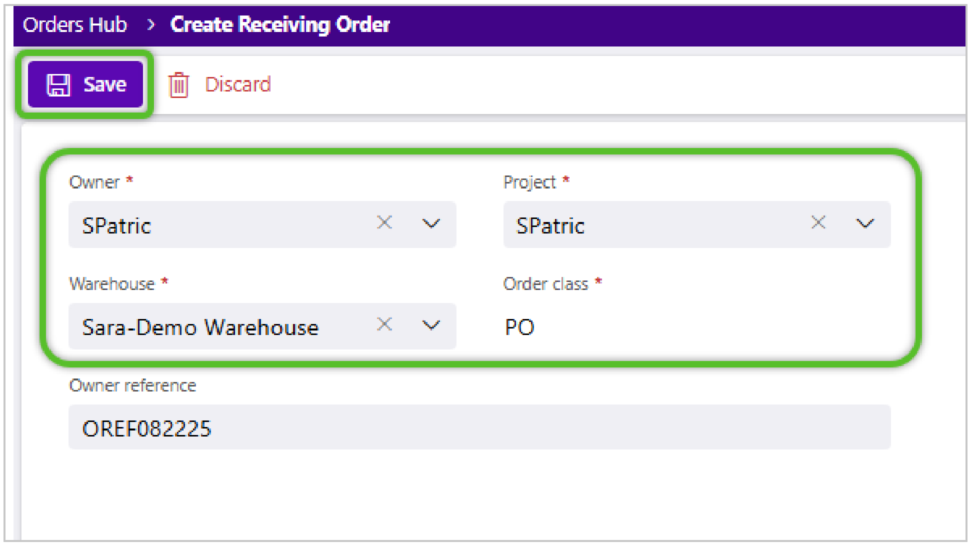
1. From the **Orders Hub**, click the option to **+ Create receiving order**.



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.

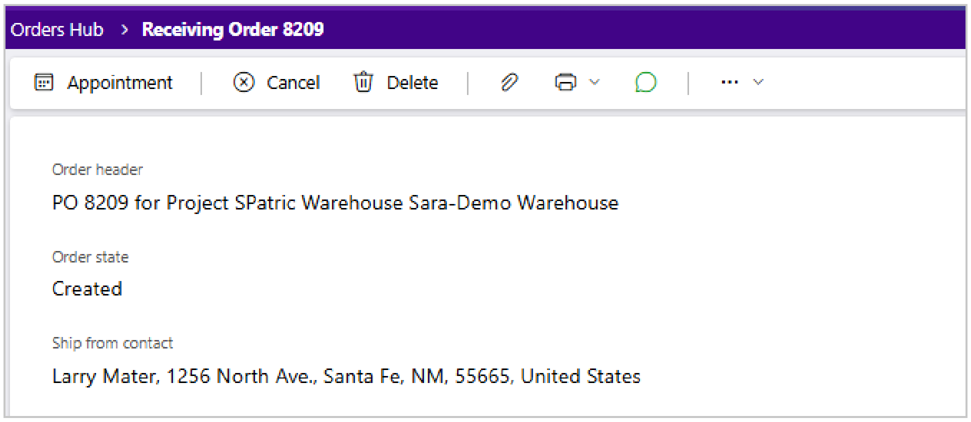
2. (Optional): Input an **Owner reference** .

3. Click **Save** to proceed with the selected options and open the new order.

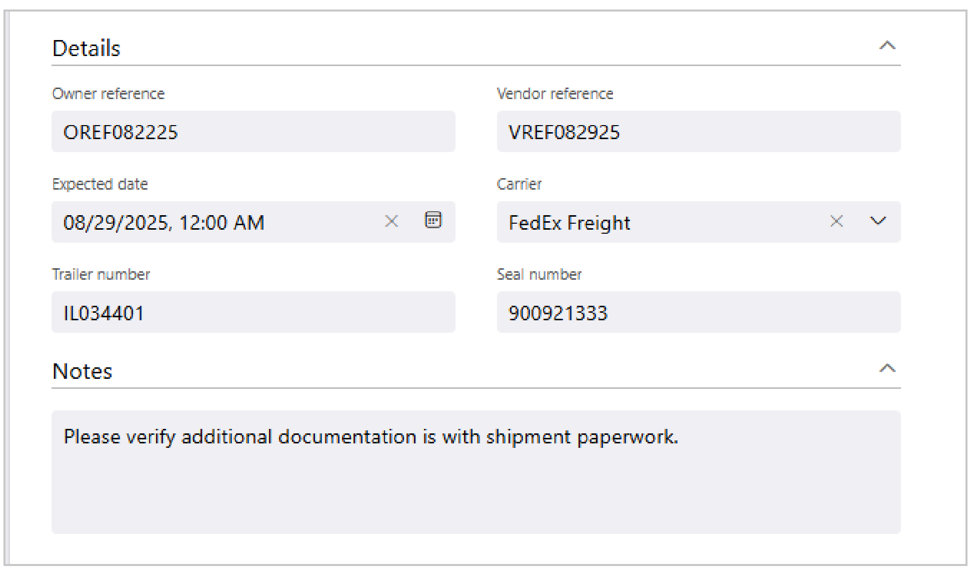


4. (Optional): Enter additional information on shipping, carriers, and vendor under the **Details** section that can be opened by clicking the down pointing arrow.

Receiving order details



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.



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.

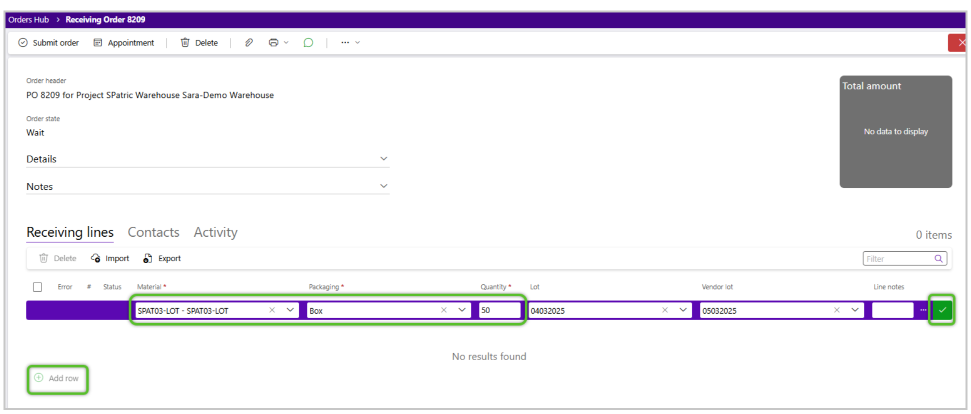
5. Click the green **+ Add Row** option at the bottom of the **Receiving lines** tab to begin specifying the incoming inventory.

6. Select a **Material** from the list available to the Project.

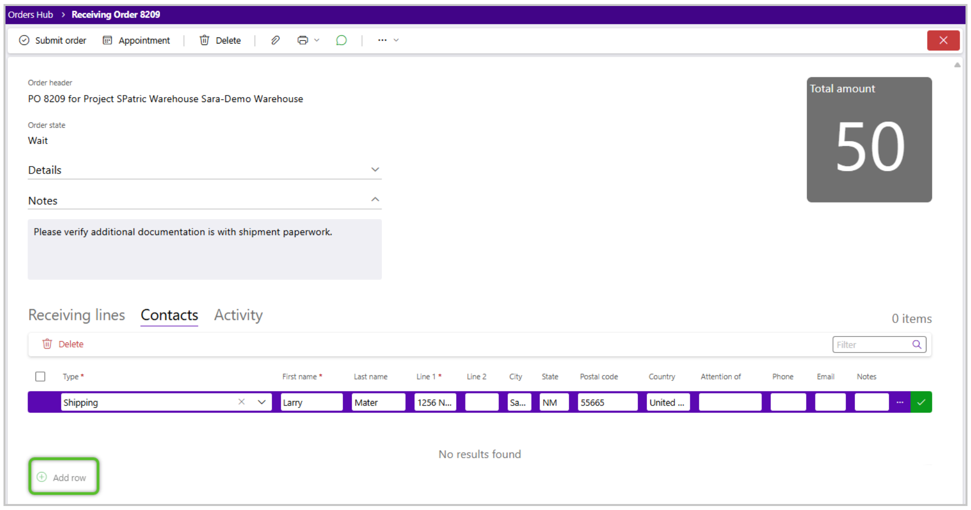
7. Select the correct **Packaging** and enter the required **Quantity**.

8. Click the green checkmark at the end of the row.

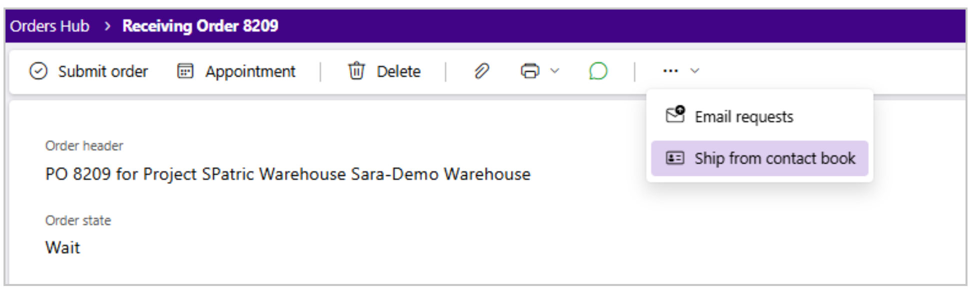
Repeat steps 5-8 to add more order Lines.



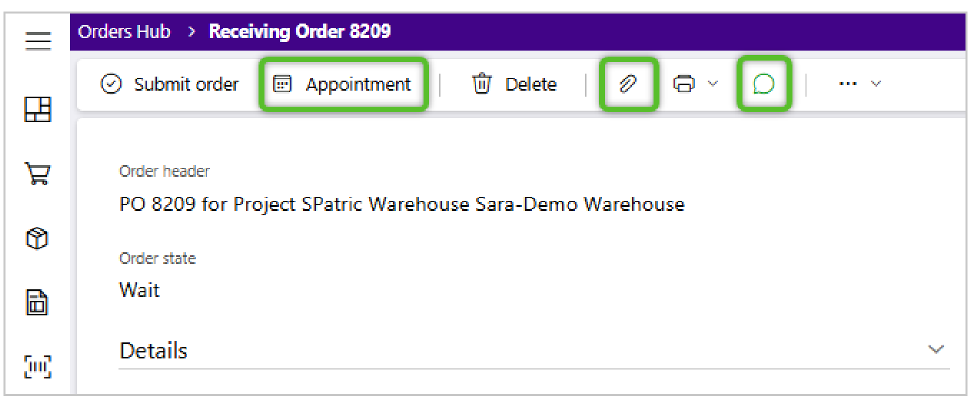
9. (Optional): Click the **Contacts** tab to add one-off address types.



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.



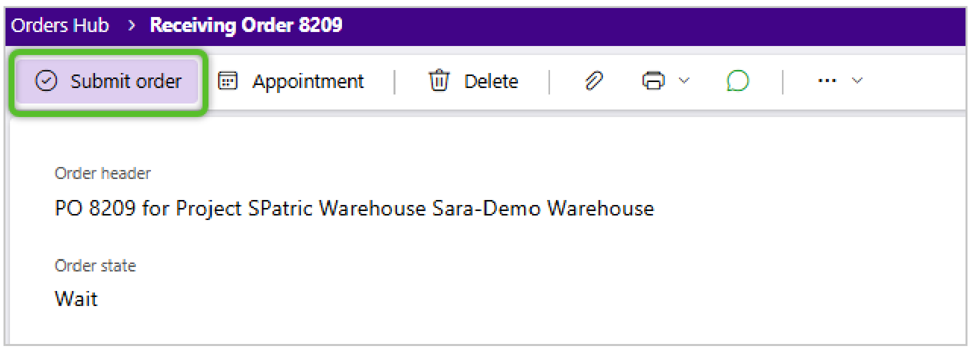
11. (Optional): Use the Order toolbar options to **Add a Dock Appointment**, **Add attachments**, or **use the Discussion tool** to leave a comment for the warehouse when the order is submitted.



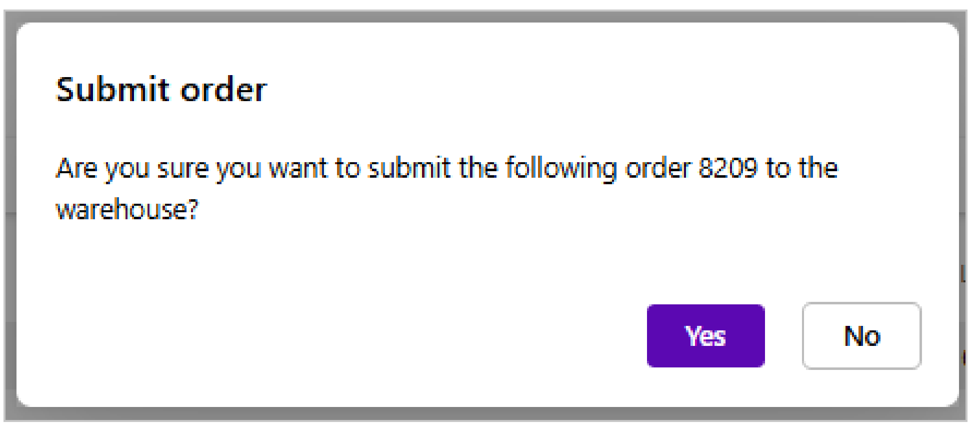
12. Finally, when the order is ready and you want to send it to the warehouse's Footprint WMS to manage, click the **Submit order** button.

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**.



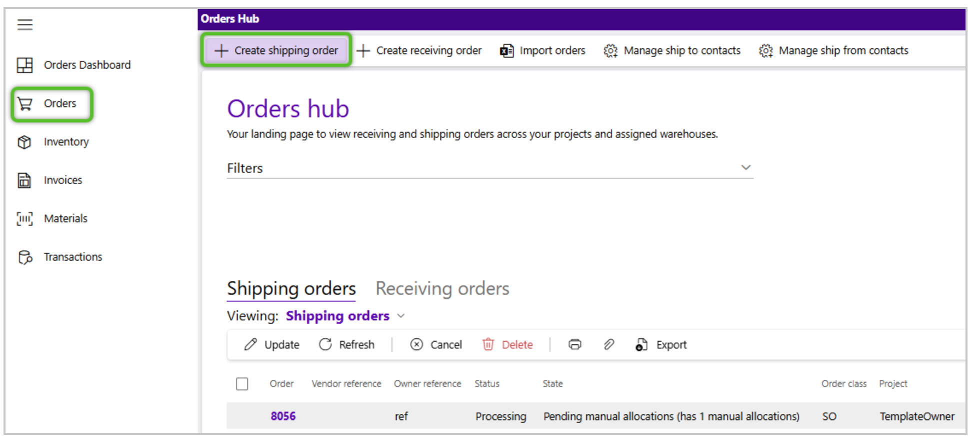
Now that you've created and submitted the order it will be visible to the warehouse's Footprint WMS to begin managing. You can find it in **Created** status on the **Receiving orders** tab of the **Orders hub** and the **Orders Dashboard**.

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

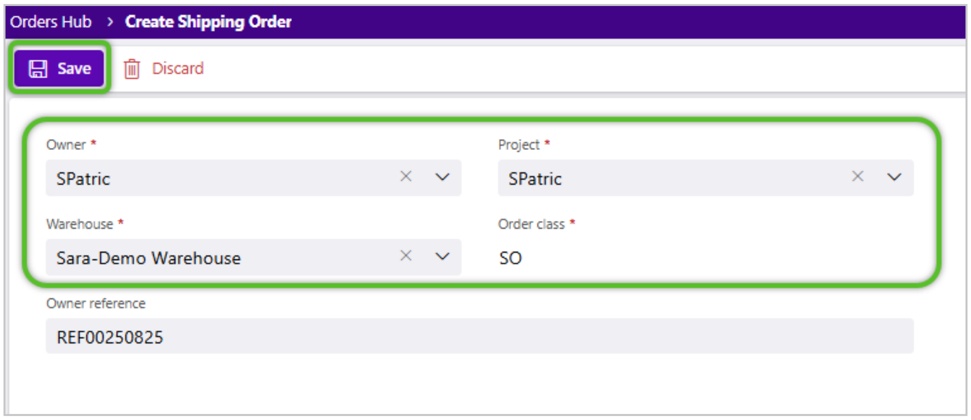
1. From the **Orders hub**, click the option to **+ Create shipping order**.



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.

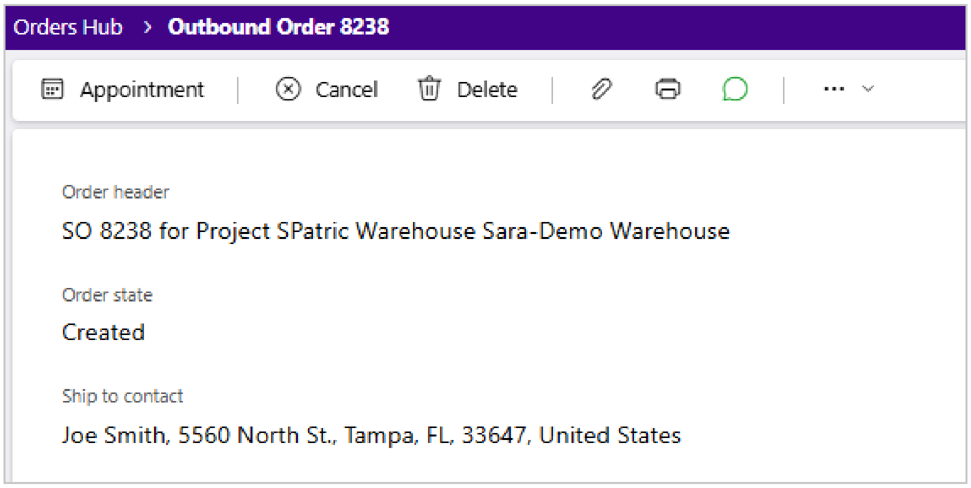
2. (Optional): Input a reference number for the Order.

3. Click **Save** to proceed with the selected options and open the new order.

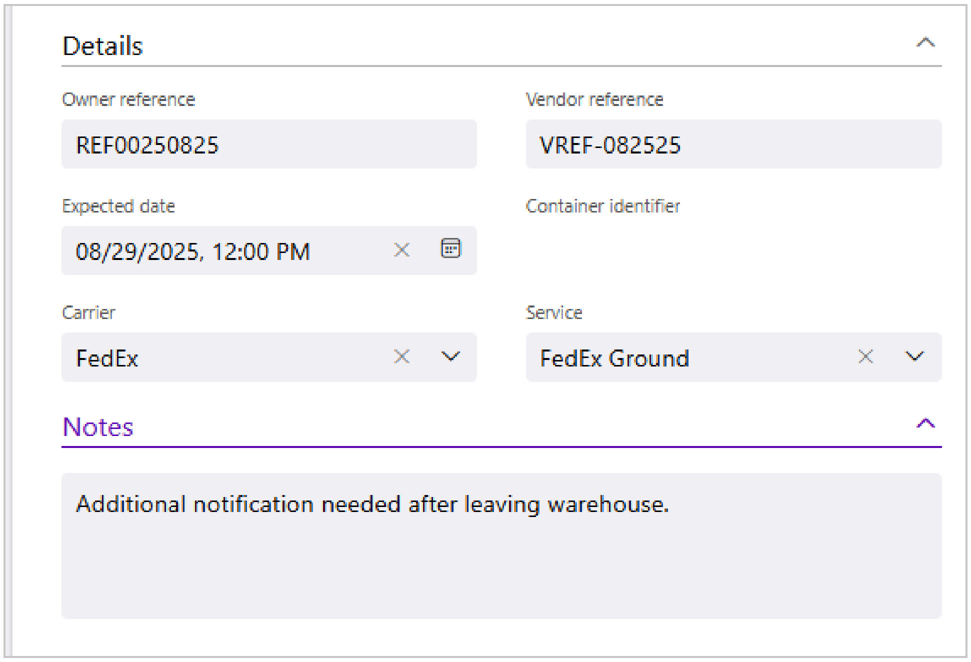


4. (Optional): Enter additional information on shipping, carriers, and vendor under the **Details** section that can be opened by clicking the down pointing arrow.

Shipping order details



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.



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.

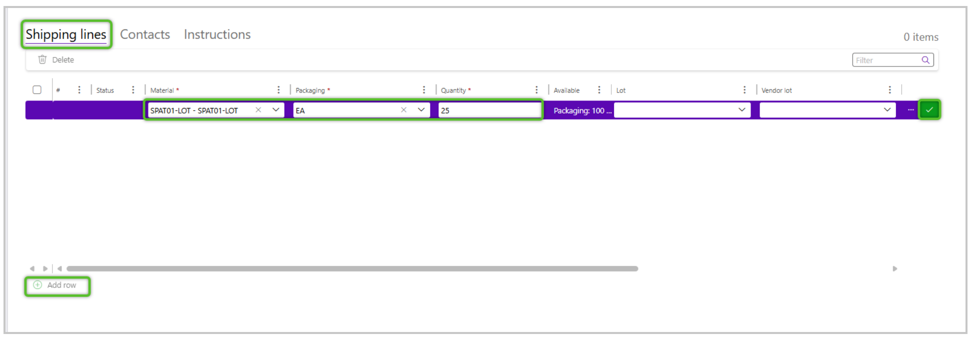
7. Select the correct **Packaging** and enter the required **Quantity**.

Note

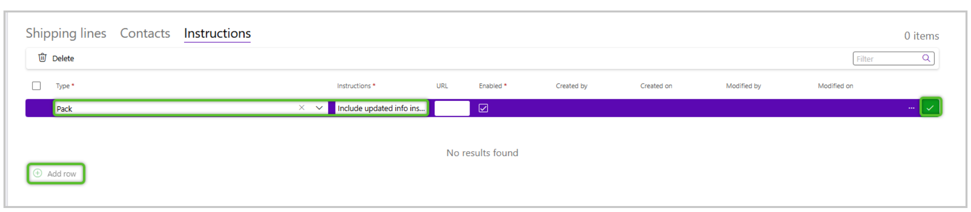
If a Lot is not selected for a Line, the default is the Material 's Allocation Strategy.

8. Click the checkmark at the end of the row.

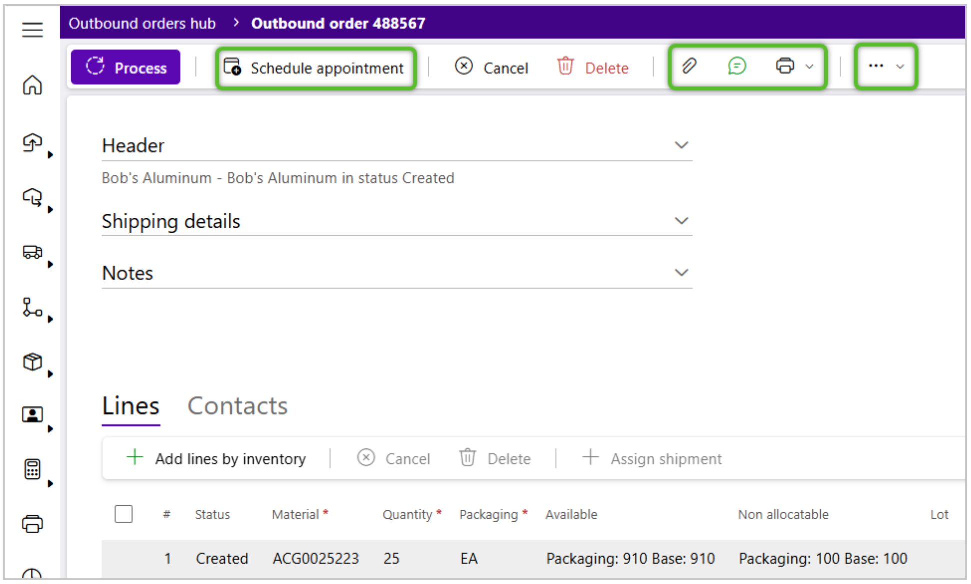
Repeat steps 5-8 to add more order Lines.



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



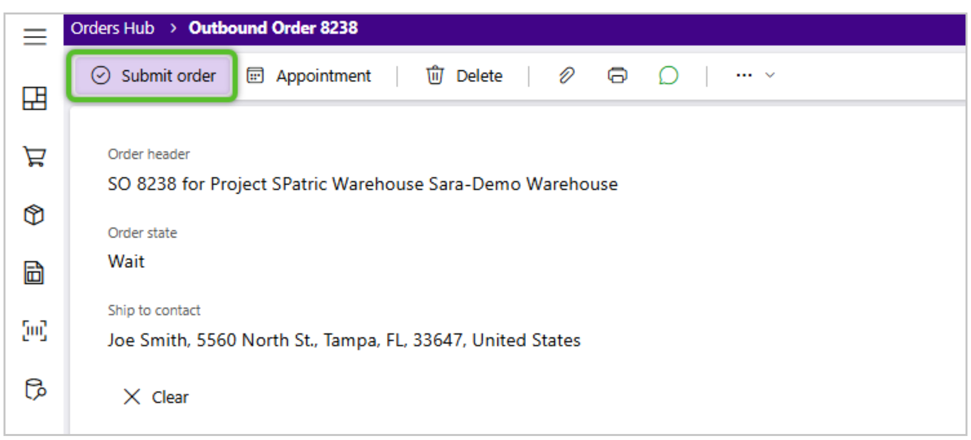
10. (Optional): Use the Order toolbar options to Add a Dock Appointment, Add attachments, or use the Discussion tool to leave a comment for the warehouse when the order is submitted.



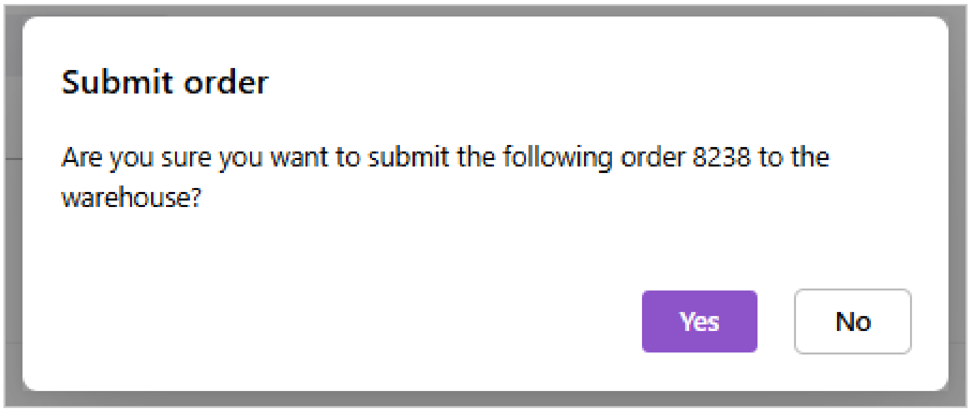
12. Finally, when the order is ready and you want to send it to the Footprint WMS to manage, click the **Submit order** button.

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**.

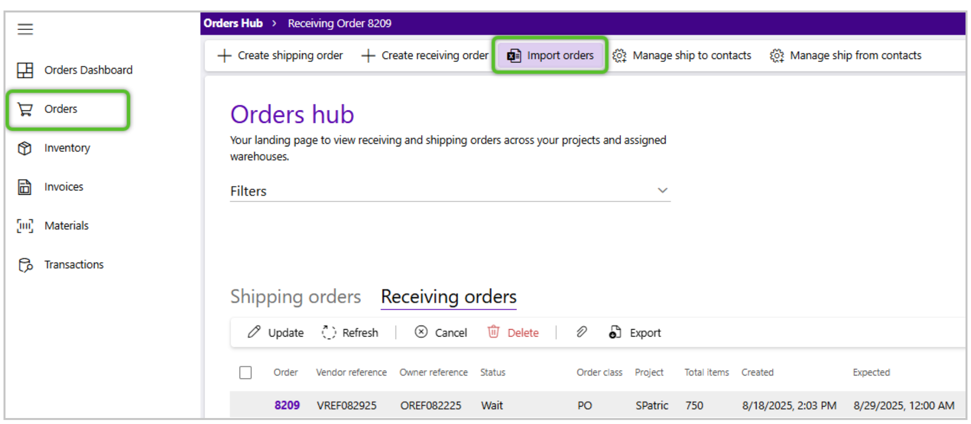
Import Orders

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

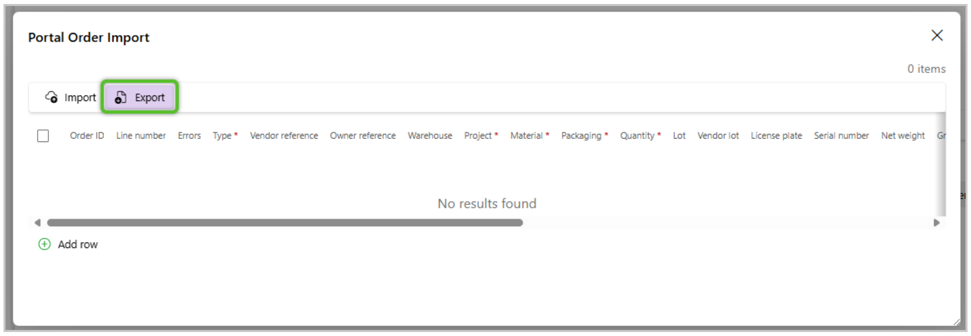
Please Note

- 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.

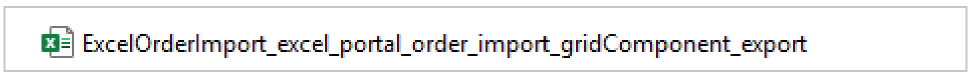
1. From the **Orders hub**, click the **Import orders** button.



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



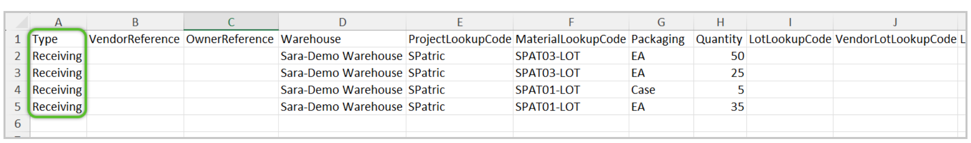
3. Locate the file named '**ExcelOrderImport_excel_portal_order_import_ gridComponent_export**' and double click on it to open it.



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										

datex

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 L
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 L
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.

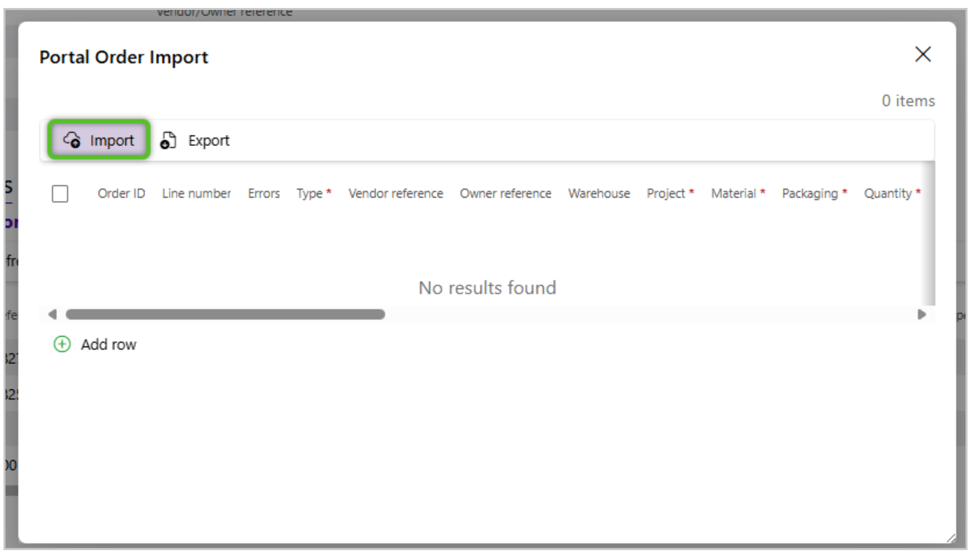
7. Column H, is required. Here you enter the **Quantity** of each material listed.

Type	VendorReference	OwnerReference	Warehouse	ProjectLookupCode	MaterialLookupCode	Packaging	Quantity	LotLookupCode	VendorLotLookupCode
Receiving			Sara-Demo Warehouse	SPatric	SPAT03-LOT	EA	50		
Receiving			Sara-Demo Warehouse	SPatric	SPAT03-LOT	EA	25		
Receiving			Sara-Demo Warehouse	SPatric	SPAT01-LOT	Case	5		
Receiving			Sara-Demo Warehouse	SPatric	SPAT01-LOT	EA	35		

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

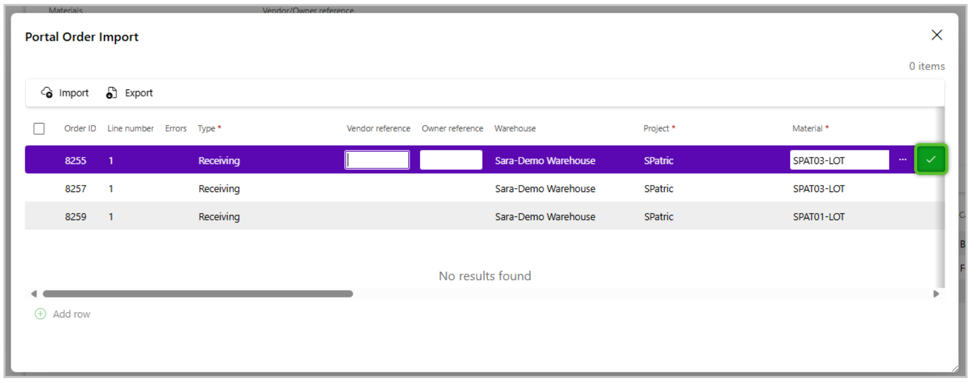
Type	VendorReference	OwnerReference	Warehouse	ProjectLookupCode	MaterialLookupCode	Packaging	Quantity	LotLookupCode	VendorLotLookupCode
Receiving			Sara-Demo Warehouse	SPatric	SPAT03-LOT	EA	50		
Receiving			Sara-Demo Warehouse	SPatric	SPAT03-LOT	EA	25		
Receiving			Sara-Demo Warehouse	SPatric	SPAT01-LOT	Case	5		
Receiving			Sara-Demo Warehouse	SPatric	SPAT01-LOT	EA	35		

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

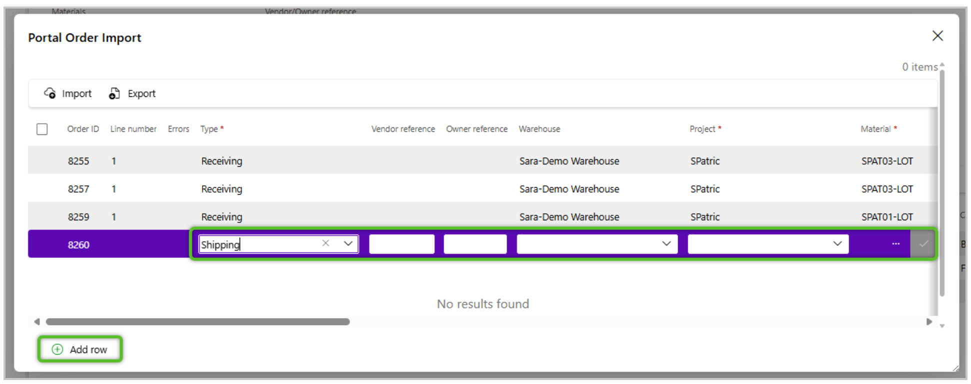


The order details will display for review and edits.

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



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



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

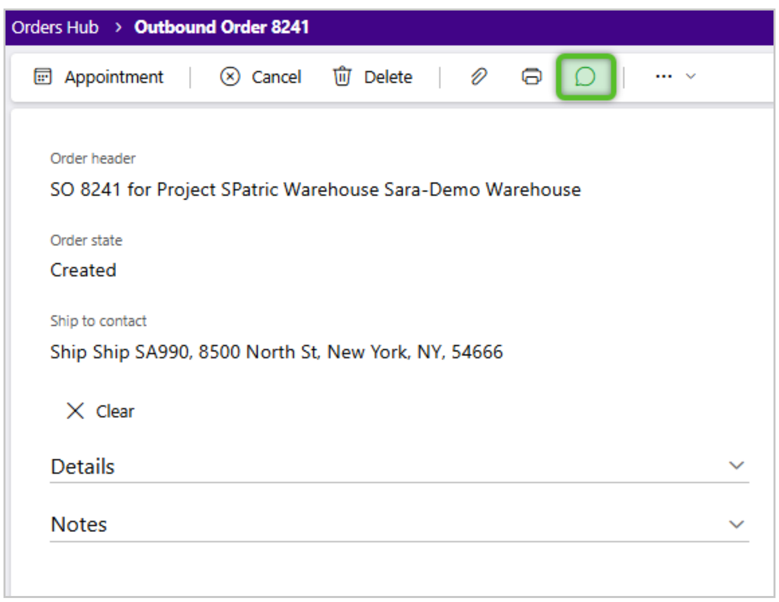
Discussions

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

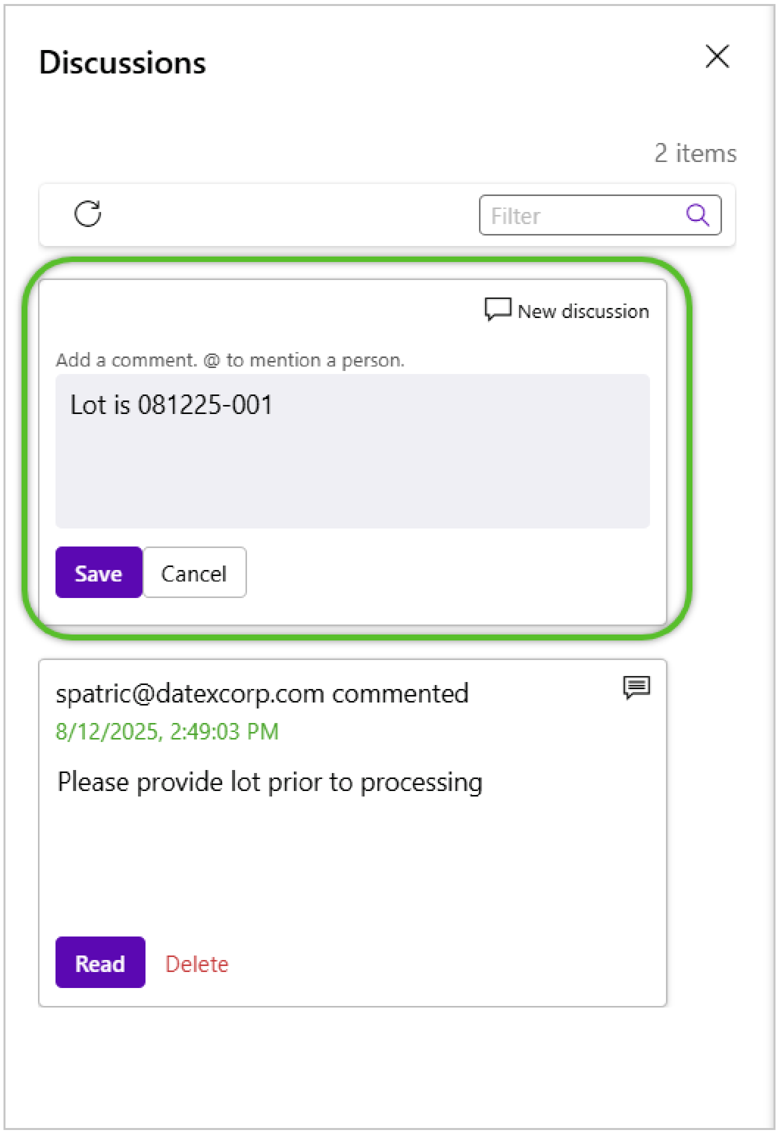
- The Discussion feature must be enabled in both the WMS and the Portal

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 (...) menu.



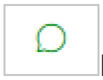
Any previous Comments will be listed for review and response.

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.

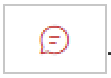


3. To mark an existing comment as read, click the **Read** button in the comment card.

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

No comments have been made

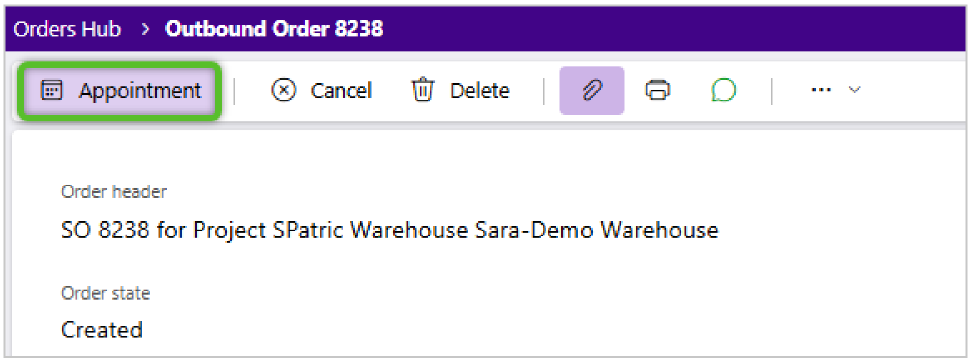
There are unread comments

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.



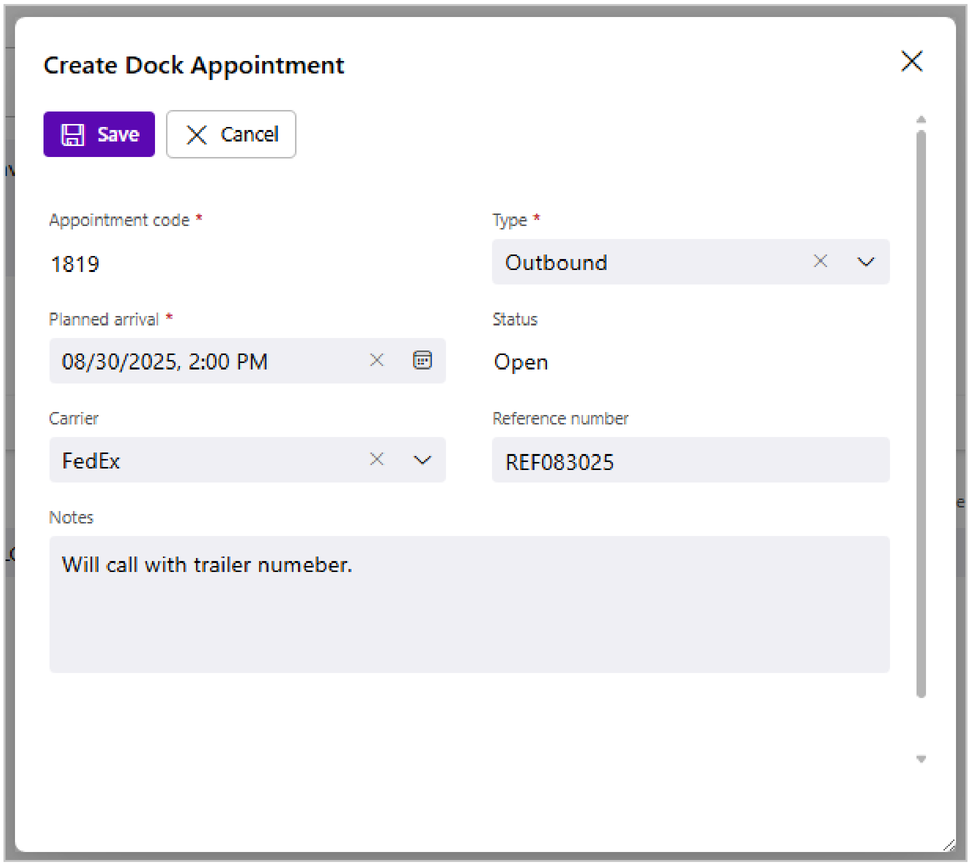
In the **Create Dock Appointment** window, the **Appointment Code**, **Type**, and **Status** will be populated.

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.

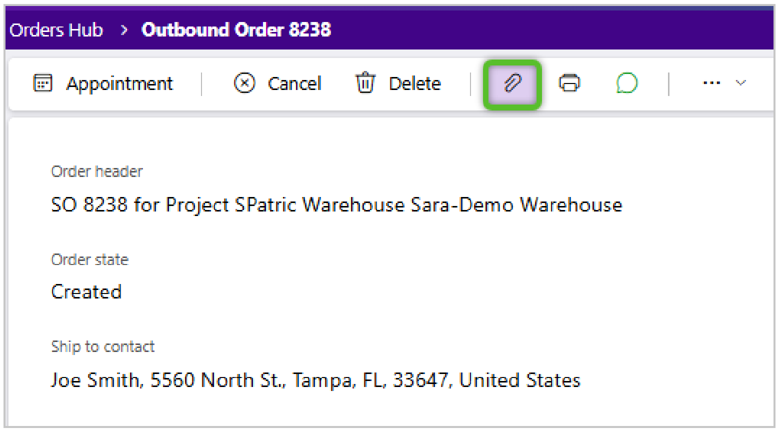
Add Attachments

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

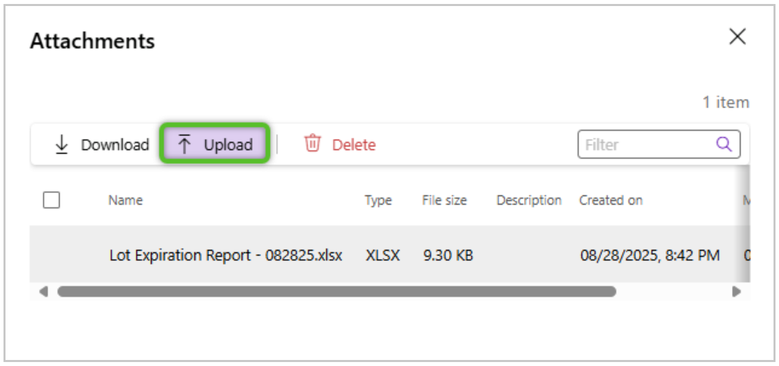
Prerequisites

- 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.

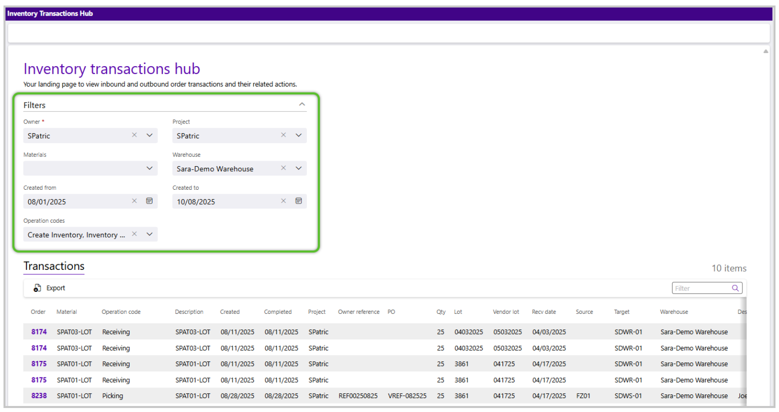


The attachment will be added to the entity and can be viewed, downloaded, or deleted as needed.

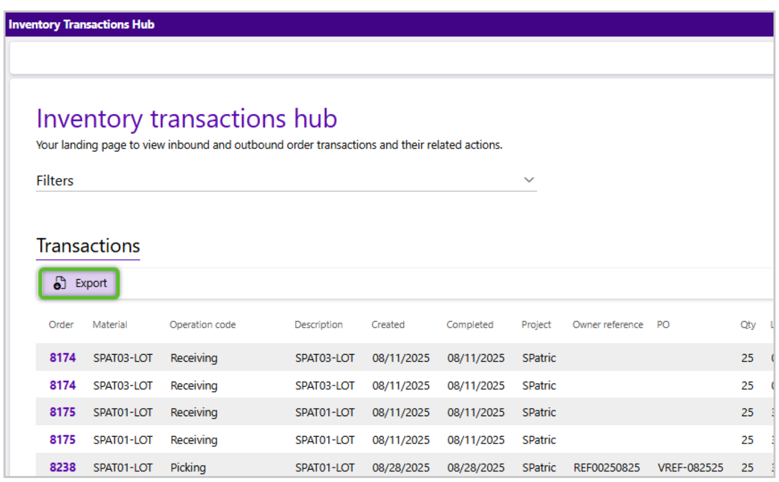
Exporting grid data

Most grids in Footprint Portal contain data that you can filter and, once it is set to you 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.

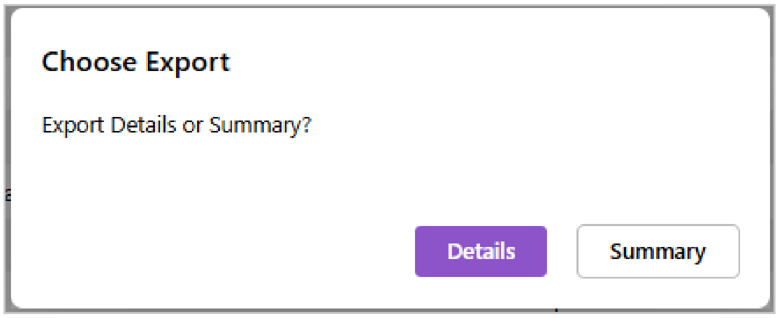
1. To configure the data in the grid to your liking, regardless of the hub, click the down arrow to the right of the **Filters** header to open the section and review the parameters. As you make selections the data in the grid will update to reflect your choices. Additional filter options may be available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



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



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.



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.

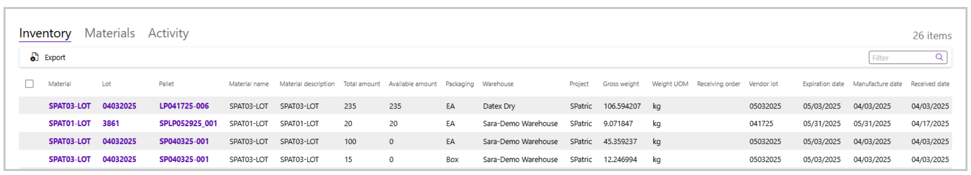
Inventory can be displayed by Pallet, by Lot, or by Material using the **Inventory type** buttons.

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

26 items

Export

Filter

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.

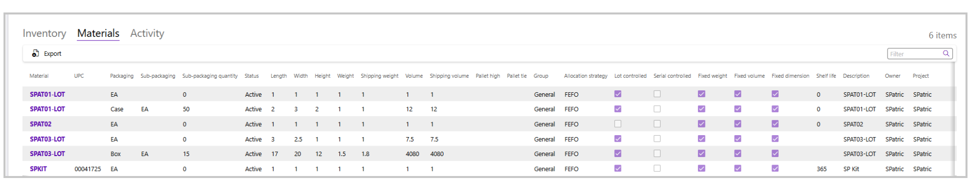
Project: The name of the project associated with the material inventory.

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.



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	Fixed dimension	Shelf life	Description	Owner	Project
SPAT01-LOT		EA		0	Active	1	1	1	1	1	1	1			General	FEFO	☑	☐	☑	☑	☑	0	SPAT01-LOT	SPatric	SPatric
SPAT01-LOT		Case	EA	50	Active	2	3	2	1	1	12	12			General	FEFO	☑	☐	☑	☑	☑	0	SPAT01-LOT	SPatric	SPatric
SPAT02		EA		0	Active	1	1	1	1	1	1	1			General	FEFO	☐	☐	☑	☑	☑	0	SPAT02	SPatric	SPatric
SPAT03-LOT		EA		0	Active	3	2.5	1	1	1	7.5	7.5			General	FEFO	☑	☐	☑	☑	☑		SPAT03-LOT	SPatric	SPatric
SPAT03-LOT		Box	EA	15	Active	17	20	12	1.5	1.8	4080	4080			General	FEFO	☑	☐	☑	☑	☑		SPAT03-LOT	SPatric	SPatric
SPKIT	00041725	EA		0	Active	1	1	1	1	1	1	1			General	FEFO	☑	☐	☑	☑	☑	365	SP Kit	SPatric	SPatric

Materials tab details

Material: The name of the material.

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

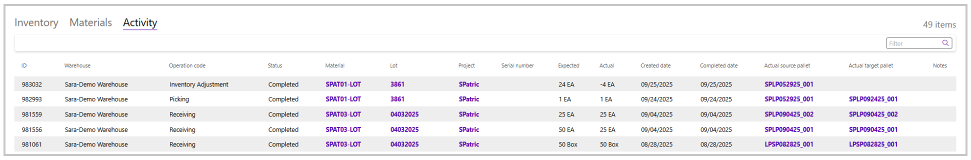
	the line.
Packaging:	The packaging level for the material inventory displayed in the line.
Sub-packaging:	The sub-packaging of the line's packaging, if any.
Sub-packaging quantity:	The amount of the sub-packaging inside the line's packaging, if any.
Status:	The current status of the material.
Length:	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 Activity 49 items

ID	Warehouse	Operation code	Status	Material	Lot	Project	Serial number	Expected	Actual	Created date	Completed date	Actual source pallet	Actual target pallet	Notes
983032	Sara-Demo Warehouse	Inventory Adjustment	Completed	SPAT01-LOT	3861	SPatric		24 EA	-4 EA	09/25/2025	09/25/2025	SPLP052925_001		
982993	Sara-Demo Warehouse	Picking	Completed	SPAT01-LOT	3861	SPatric		1 EA	1 EA	09/24/2025	09/24/2025	SPLP052925_001	SPLP092425_001	
981559	Sara-Demo Warehouse	Receiving	Completed	SPAT03-LOT	04032025	SPatric		25 EA	25 EA	09/04/2025	09/04/2025	SPLP090425_002	SPLP090425_002	
981556	Sara-Demo Warehouse	Receiving	Completed	SPAT03-LOT	04032025	SPatric		50 EA	25 EA	09/04/2025	09/04/2025	SPLP090425_001	SPLP090425_001	
981061	Sara-Demo Warehouse	Receiving	Completed	SPAT03-LOT	04032025	SPatric		50 Box	50 Box	08/28/2025	08/28/2025	LPSP082825_001	LPSP082825_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.

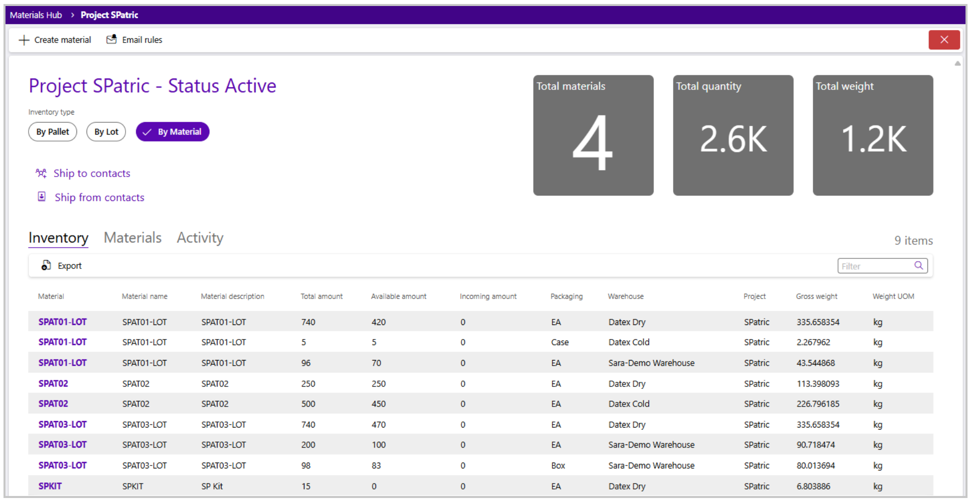
Created date: The date and time the activity was created, likely, but not always, when it started.

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.



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.

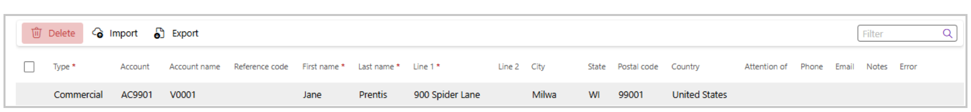
***Those in red are required fields.**

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.

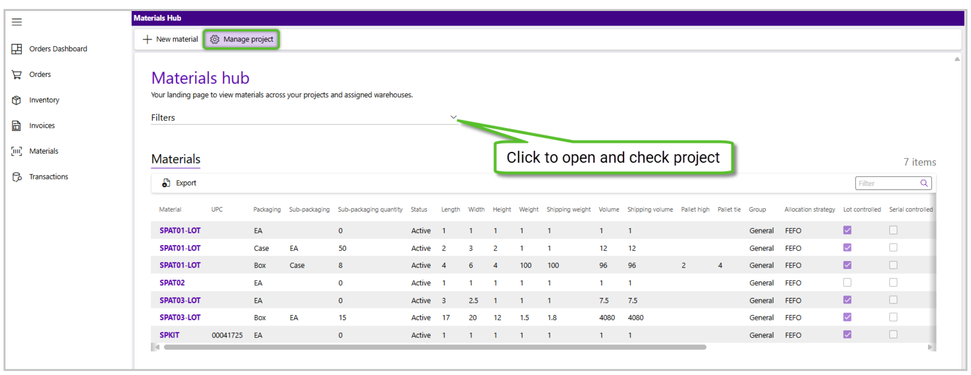


Create and manage shipping contacts

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.

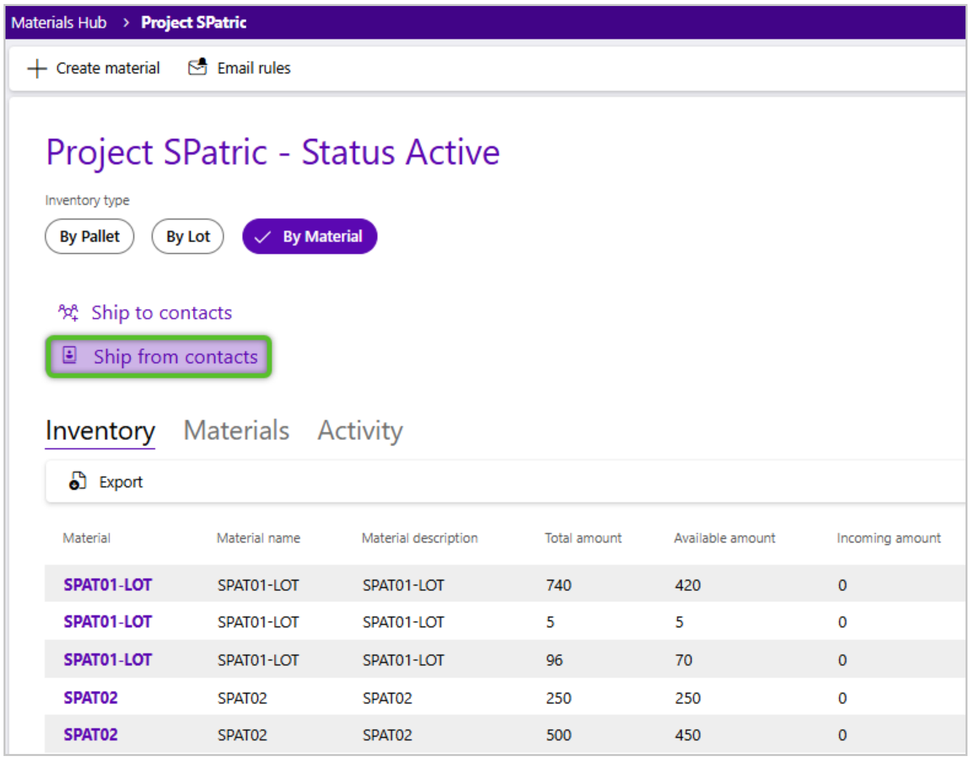
Access your project record

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.



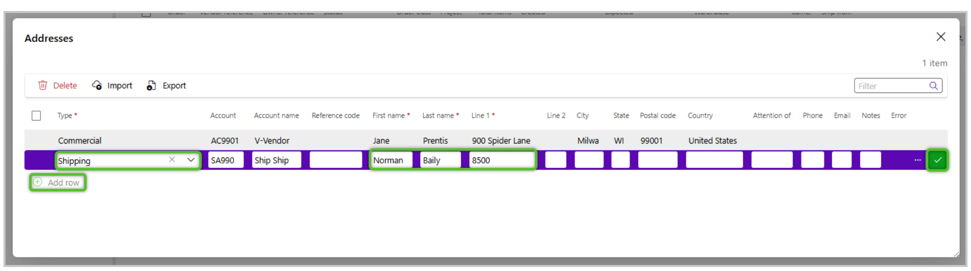
Add Ship from contact

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



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.



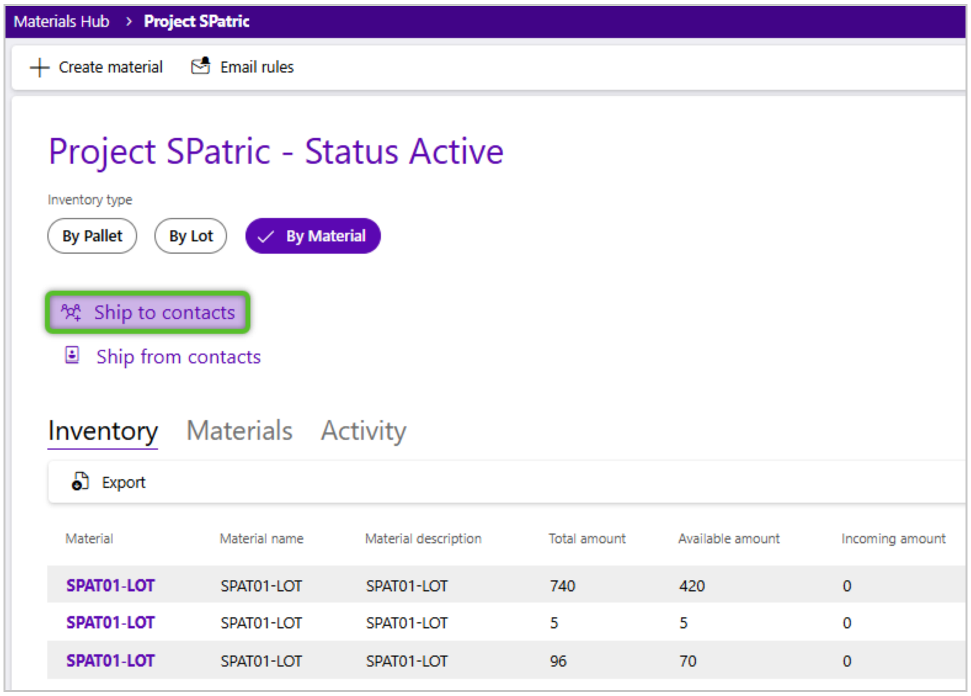
The address will now be associated with your project and can be selected when creating receiving orders.

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

datex

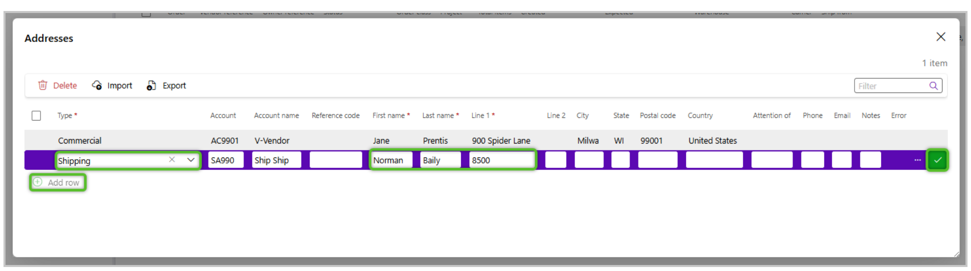
Add Ship to contact

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



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.



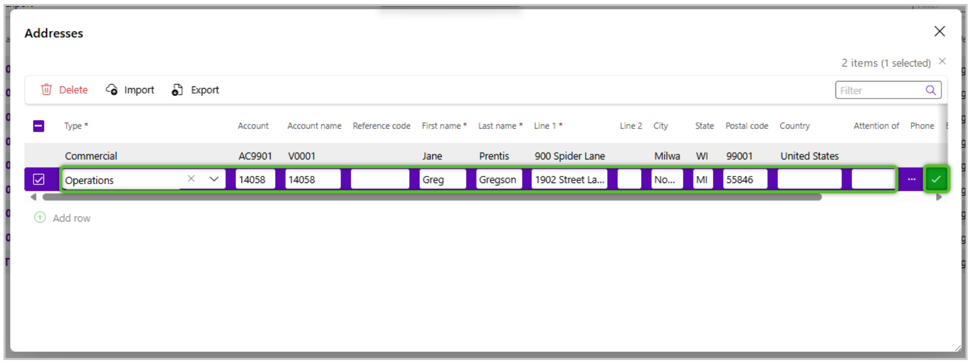
The address will now be associated with your project and can be selected when creating shipping orders.

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.



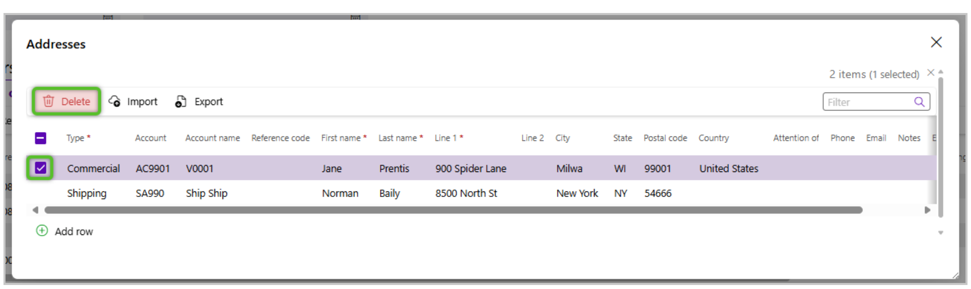
3. Once you have completed all your edits, make sure to confirm the change by clicking the check mark at the end of the row.

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.

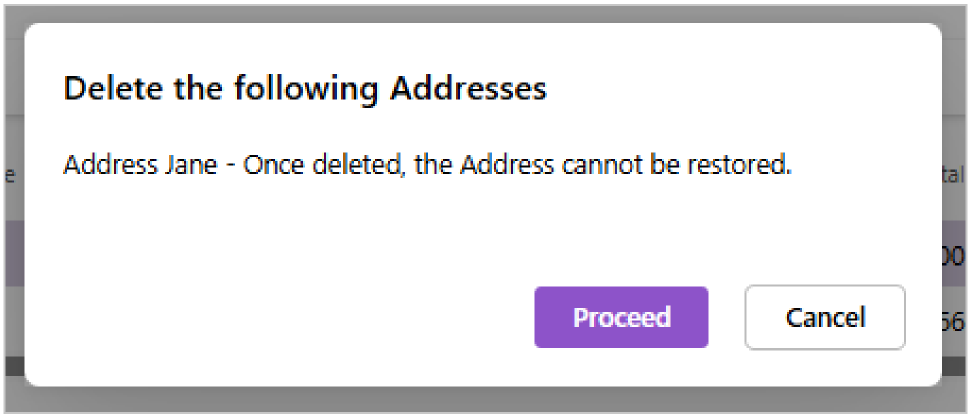
Delete a contact

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.

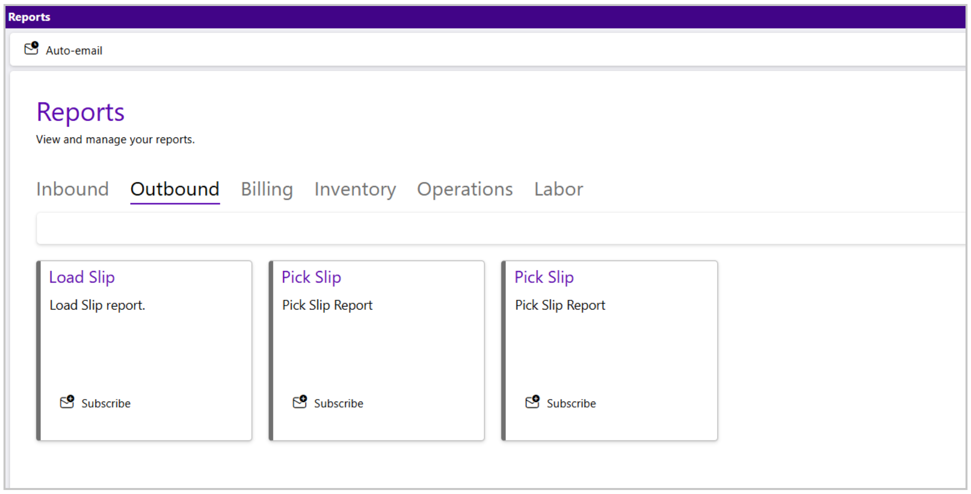
Please note, with Footprint Portal there may be additional options available for report configuration with different levels of management permissions. This guide will only focus on the baseline functionality without management permissions.

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.

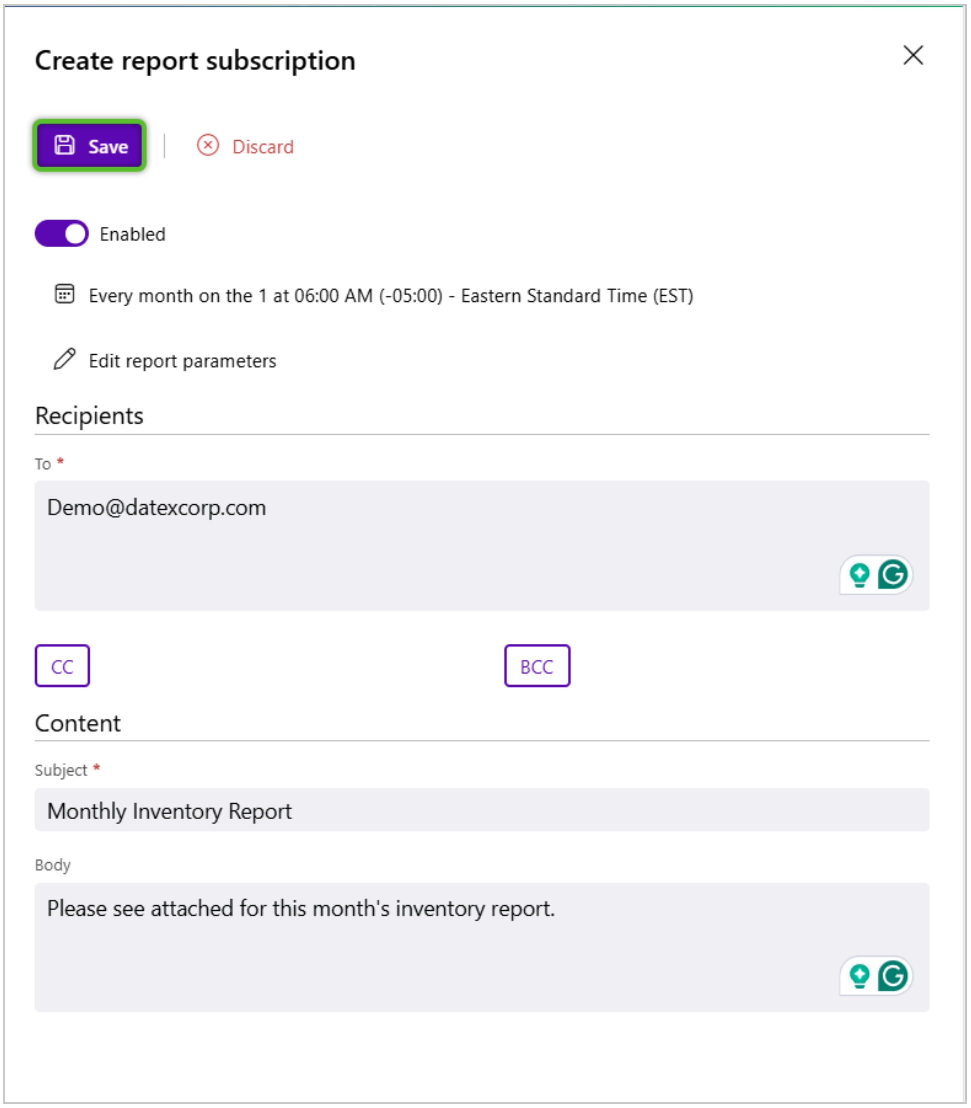
There is only one button in the hub toolbar that leads to the **Auto-email rules** hub. For more details on the Auto-email rules hub, please see Auto-email rules guide.

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.



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.

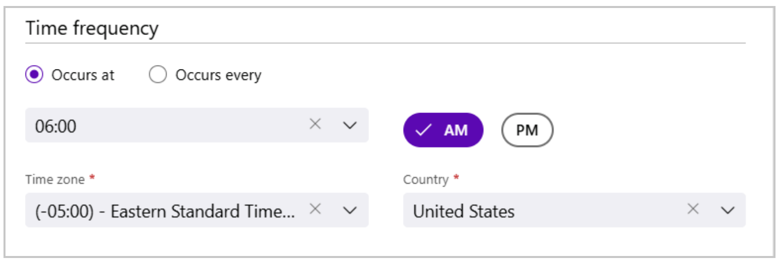
Daily

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

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

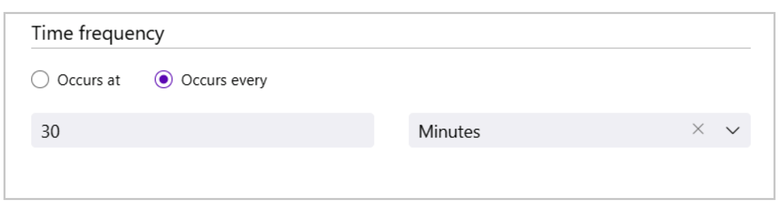


Time: The time the report will be triggered to be sent out.

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



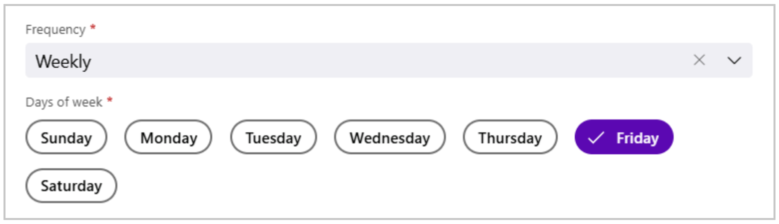
Time amount: The amount of time before the report will be triggered and sent out.

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

measure:

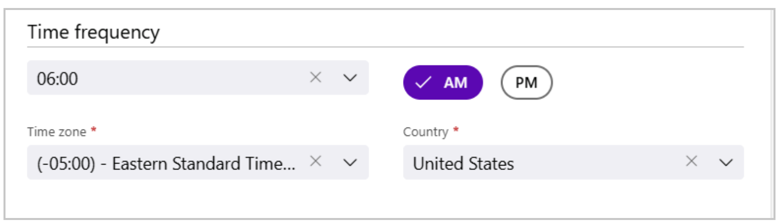
Weekly

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



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

Time frequency settings for selected day(s)



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

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

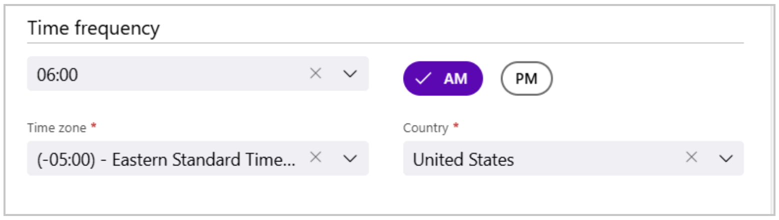
Country: The country that contains the time zone. It is recommended to select this field before setting the time zone to reduce the number of time zone options to just those in the selected country.

Monthly

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

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

Time frequency settings for selected date(s)



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:

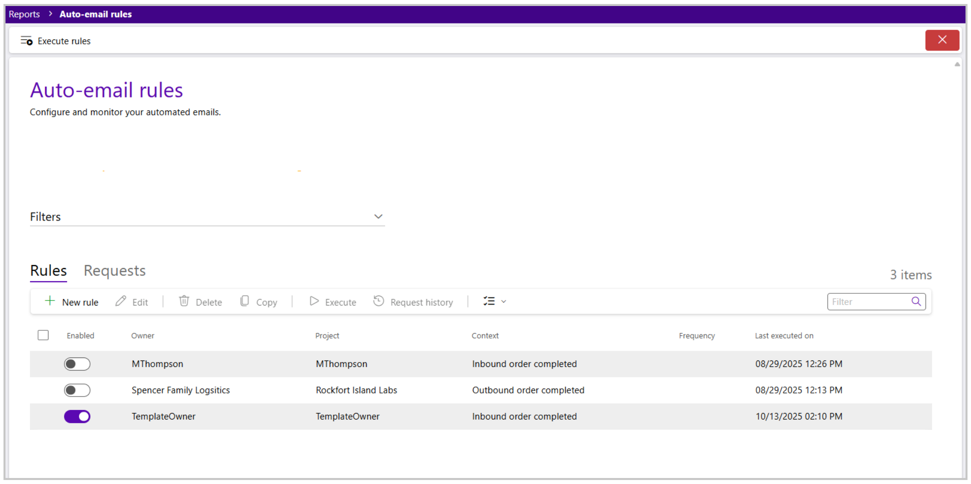
- How to subscribe to report
- How to preview and export a report

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.

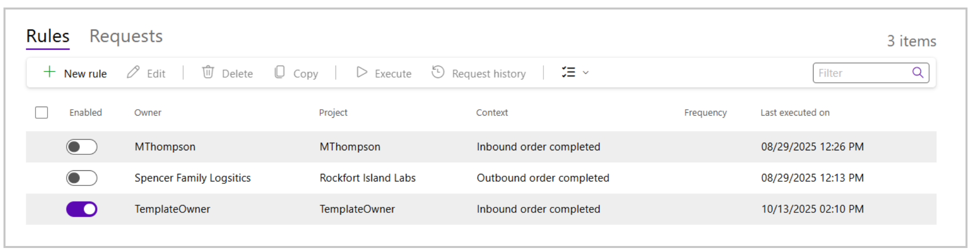
Rules can be filtered by **Owner**, **Project**, and **Context** (rule trigger, for example outbound order completion).

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 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.

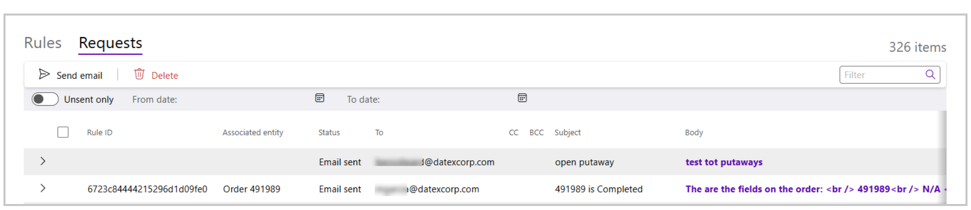
Related Tutorials

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:

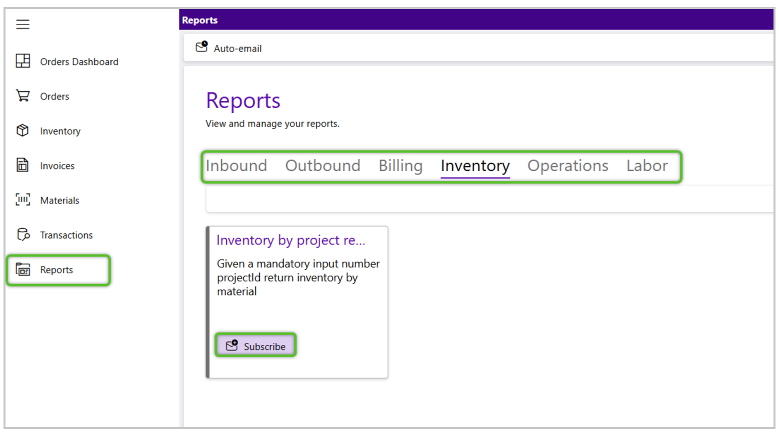
- How to resend a previously sent auto-email

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.

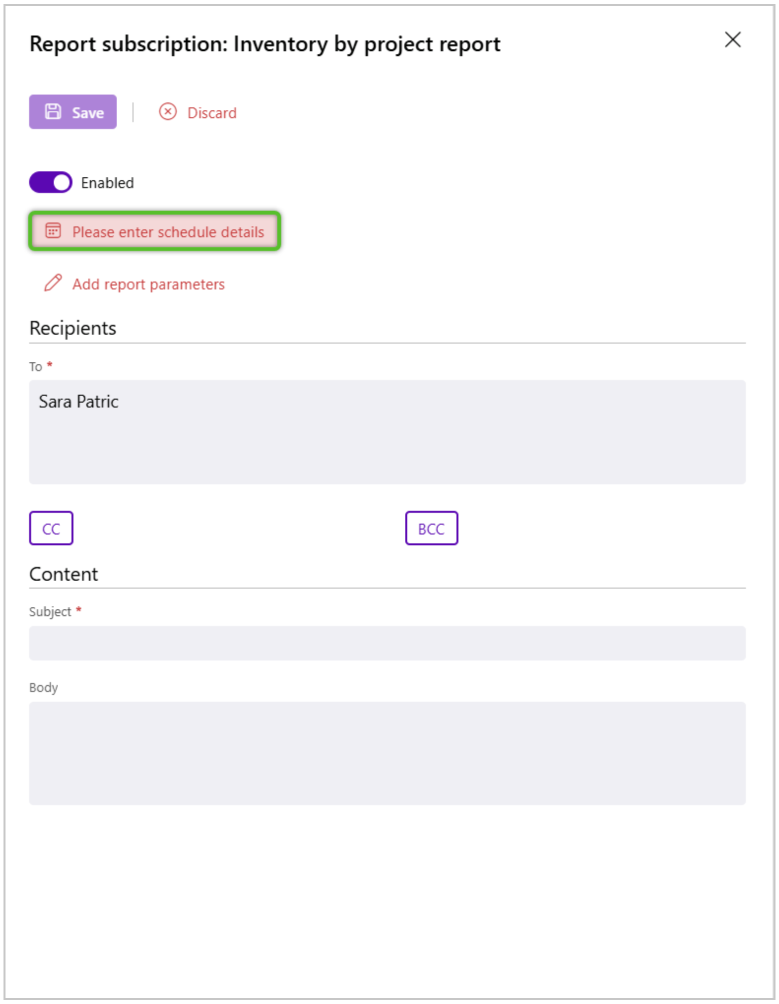
1. Open the **Reports hub** and navigate through the tabs to locate the report you wish to subscribe to.

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.



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.

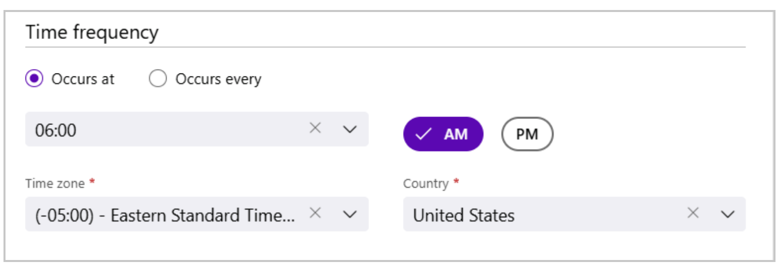
Daily

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

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

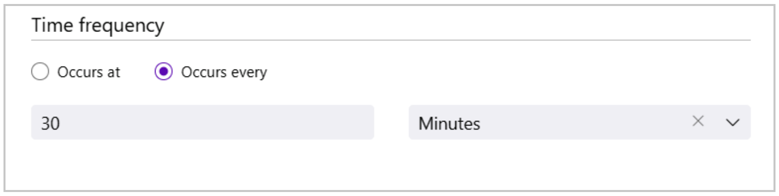


Time: The time the report will be triggered to be sent out.

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

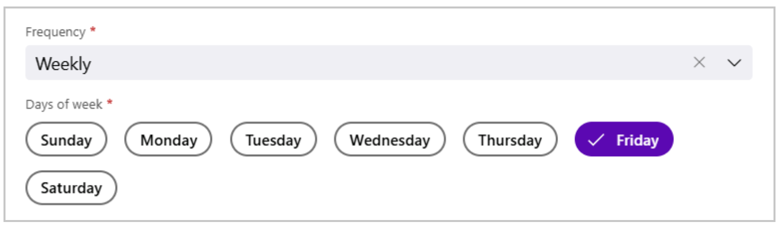


Time amount: The amount of time before the report will be triggered and sent out.

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

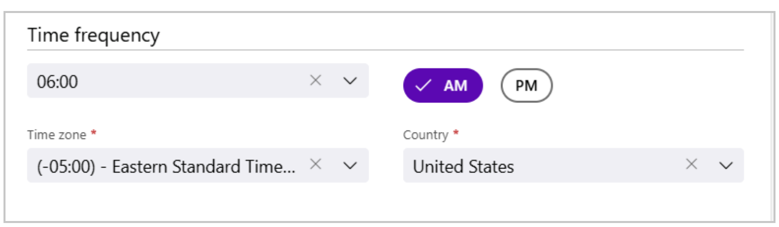
Weekly

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



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

Time frequency settings for selected day(s)



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

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

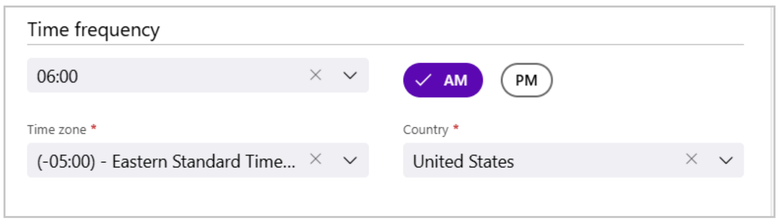
Country: The country that contains the time zone. It is recommended to select this field before setting the time zone to reduce the number of time zone options to just those in the selected country.

Monthly

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

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

Time frequency settings for selected date(s)



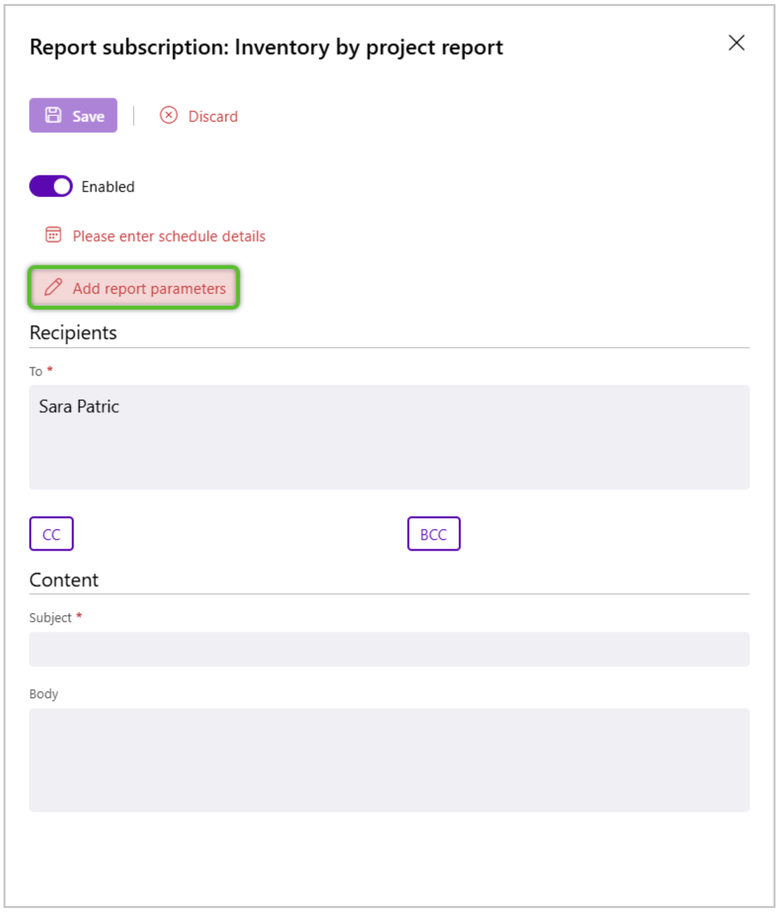
Time: The time the report will be triggered to be sent out.

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.

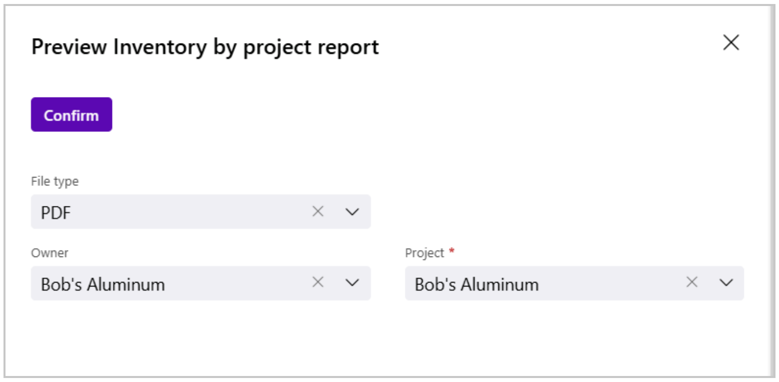
6. Once all your frequency settings are configured, click the **Confirm** button to return to the subscription flyout.

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



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**.

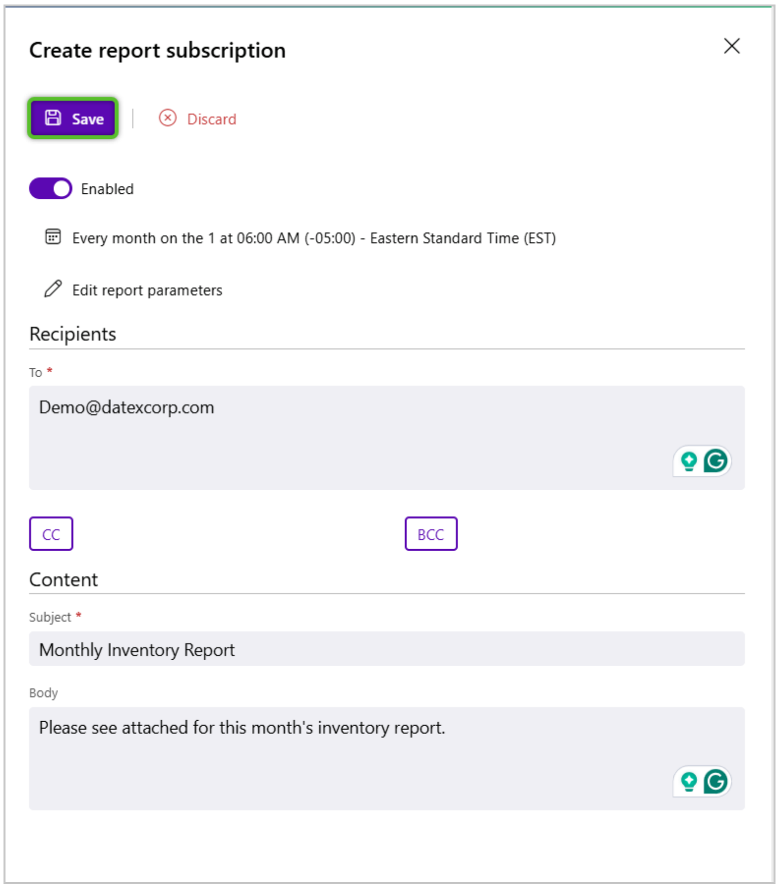
10. Enter your, or the recipient's, email address in the **To** field. While a check will occur that the email address entered has all the components that make it a valid email address, it is not checking that it's an accurate email address.

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** much be provided for the email. The **Body** for the email is optional.

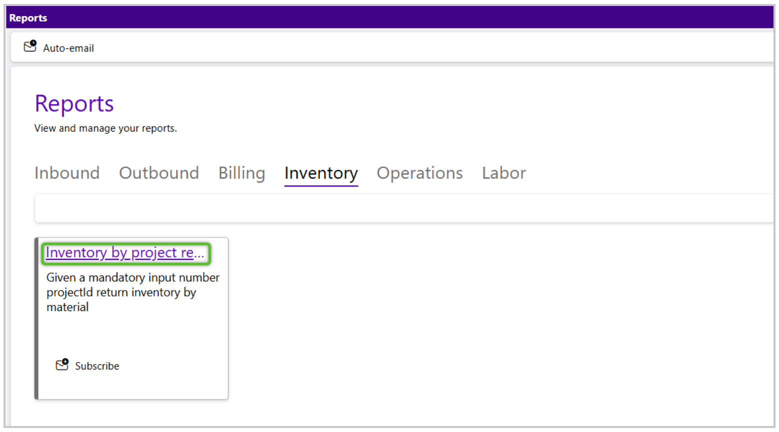
13. Once you have completed all setup to your satisfaction, click the **Save** button.



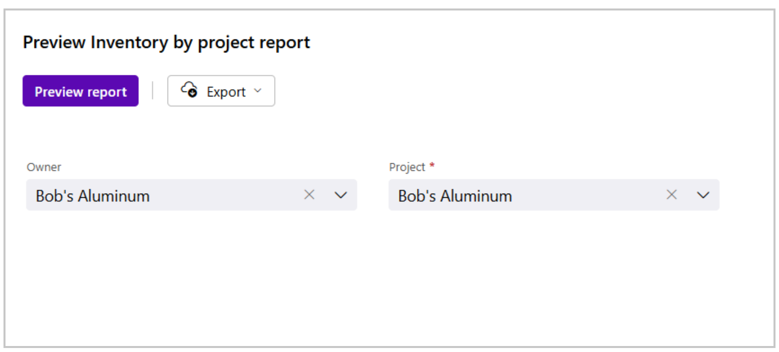
Preview and export a report

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.

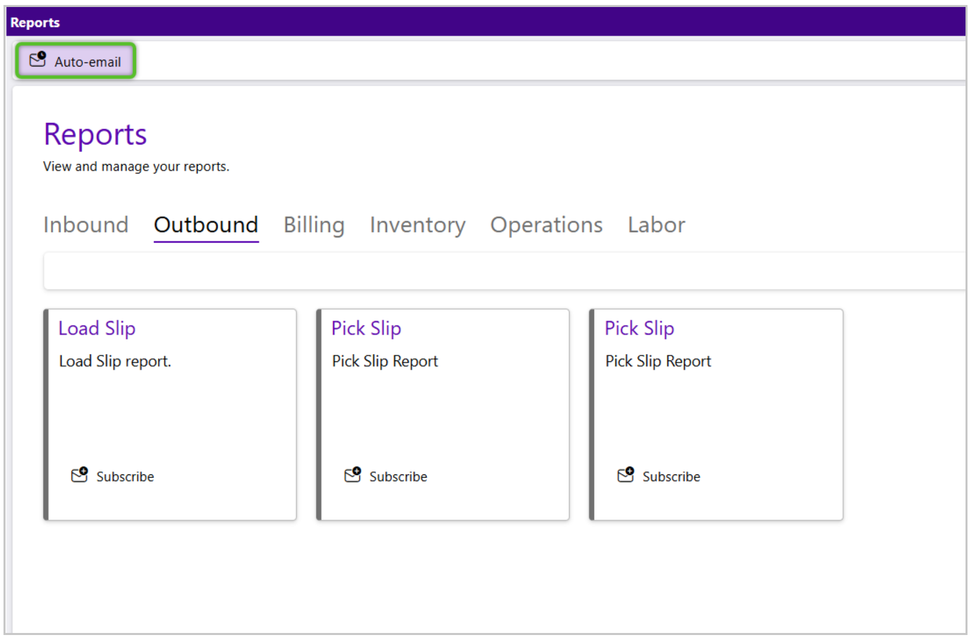
4. If you wish to export the report in one of the supported formats, **Excel**, **PDF**, **HTML**, and **CSV**, click the **Export** button to open the drop down and select the file type to begin an export and generate the file.

Create auto-email rules

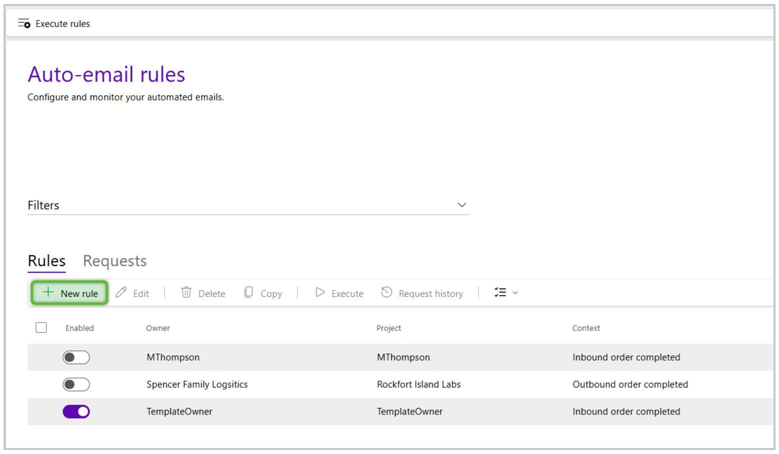
Emails can be set up to trigger automatically from the actions of many entities in Footprint Portal, for example, order completion. Once an auto-email rule is active emails from its request history can be resent if needed.

Access the Auto-email rules hub

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

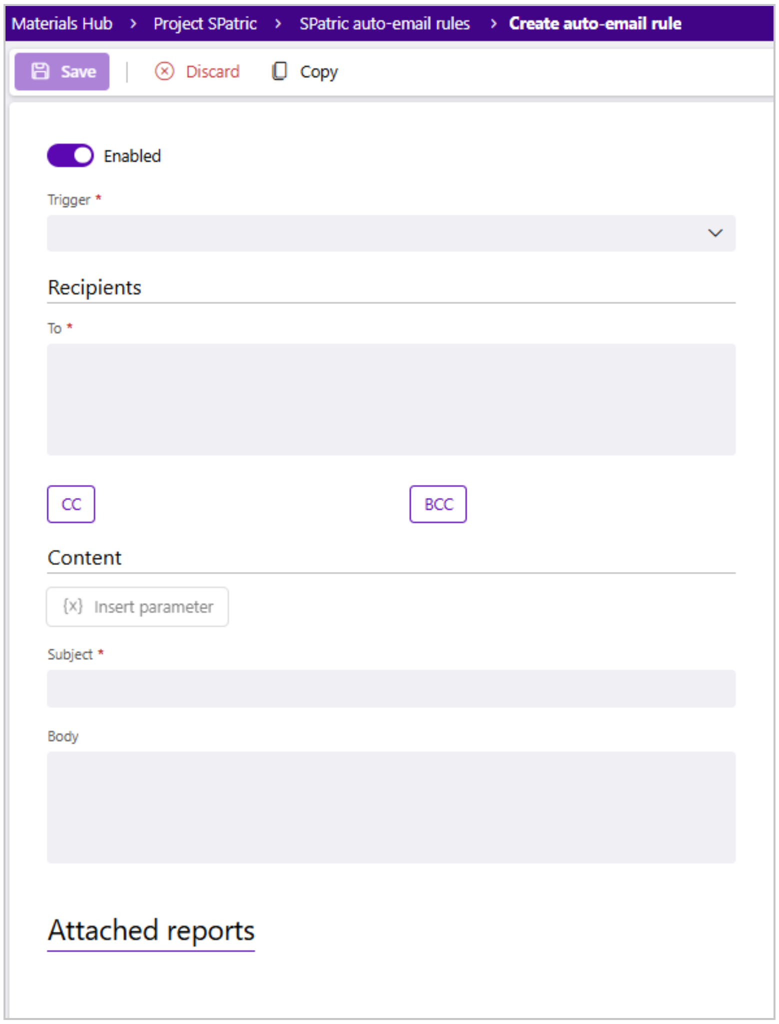


2. In the Rules tab toolbar, click **+ New rule** button.



Tip

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



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.

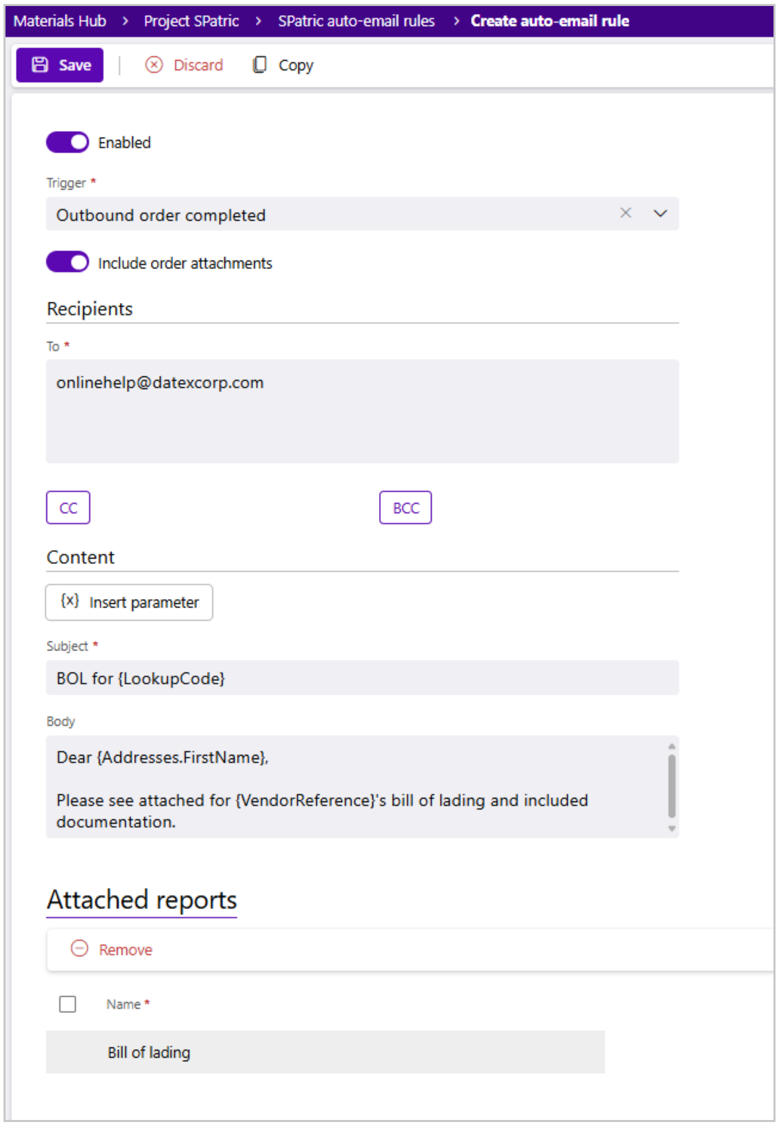
7. In the **Content** section, a **Subject** must be provided for the email. The **Body** for the email is optional. Field parameters may be added to both using the **Insert parameters** button. These parameters will add fields based on the associated entity. For example, the "Lookup" parameter for an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

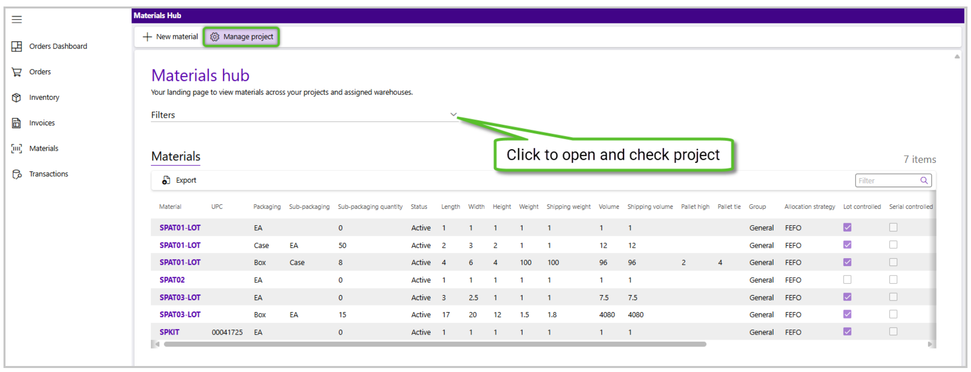


Manage auto-email rules

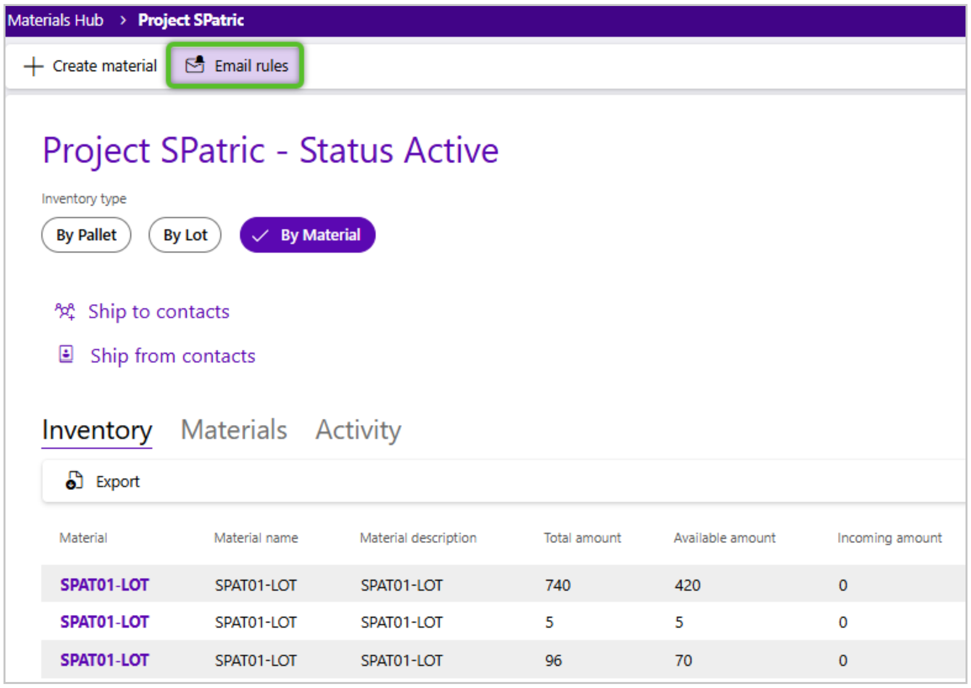
After an auto-email rule has been created, multiple actions can still be performed. These can be managed either from the project record the rule is assigned to or from the **Auto-email rules hub**. Regardless the path you take, the available options remain the same.

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.

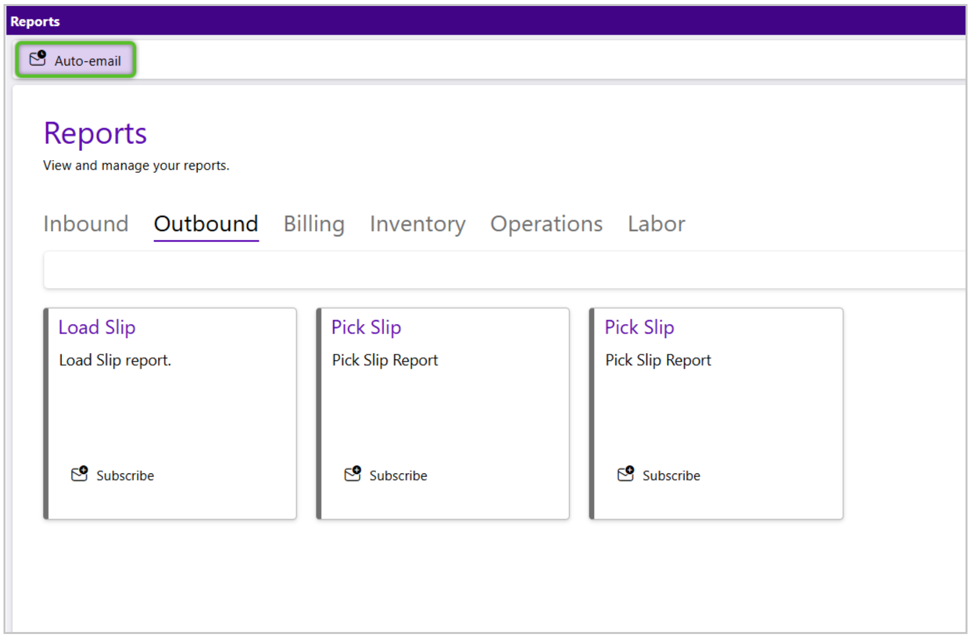


2. Once in the project record, click the Email rules button to view and manage all auto-email rules for the project.



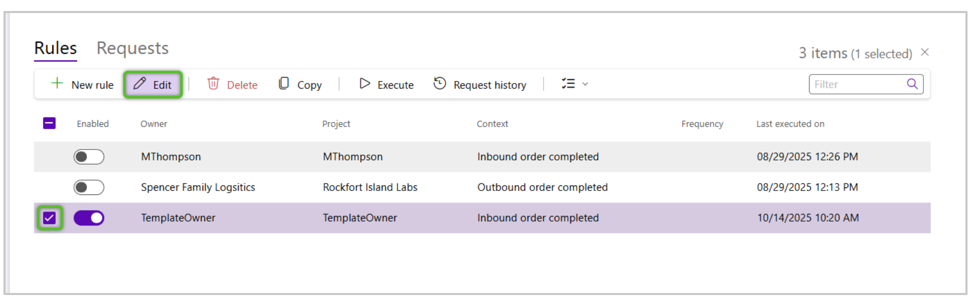
Access auto-email rules from Reports hub

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

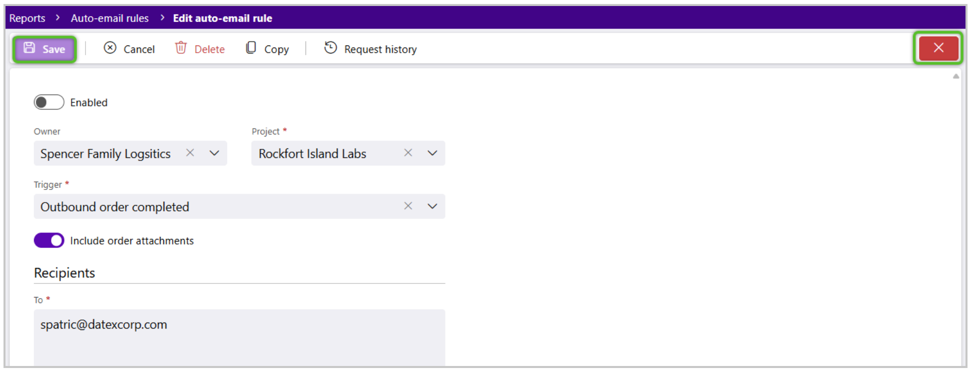
1. Locate the rule you're looking for in the grid and hover your mouse over the row until the check box is visible, then check it.



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

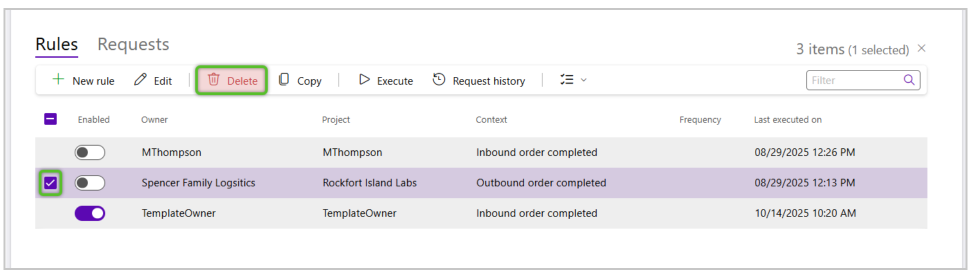
3. The auto-email rule record will open and changes can be made.

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



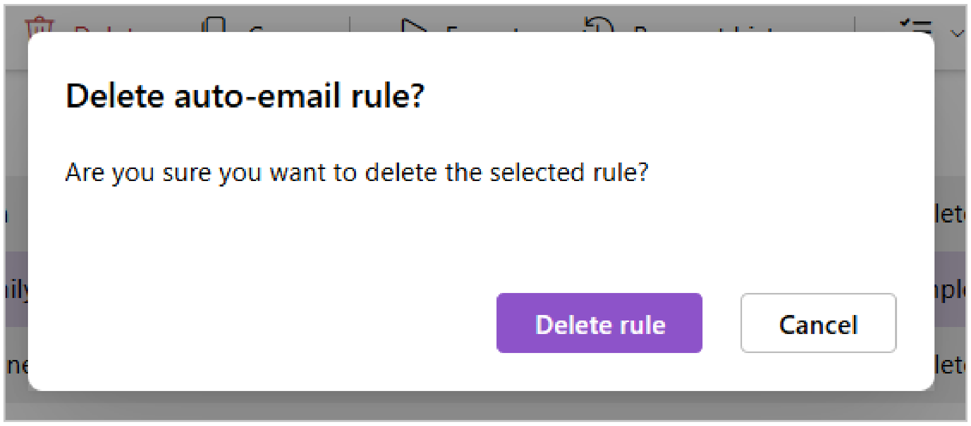
Delete a rule

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.



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

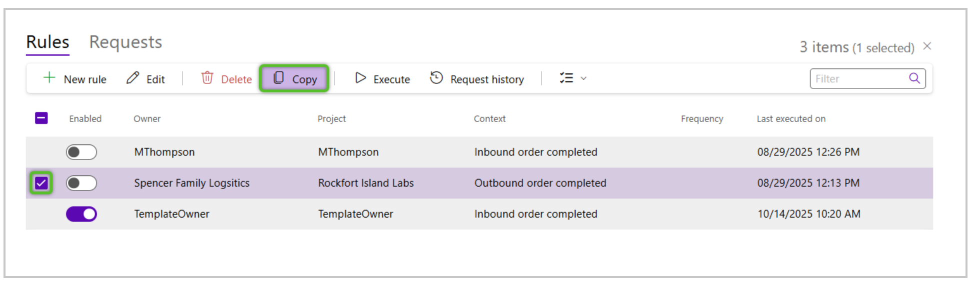
3. In the confirmation window, click **Delete rule** button to proceed.



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.

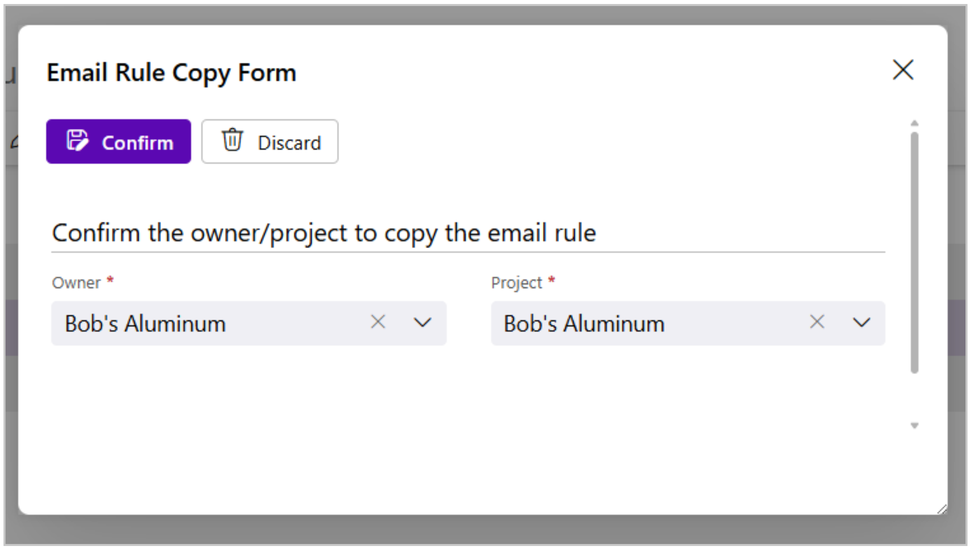
Copy a rule

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.



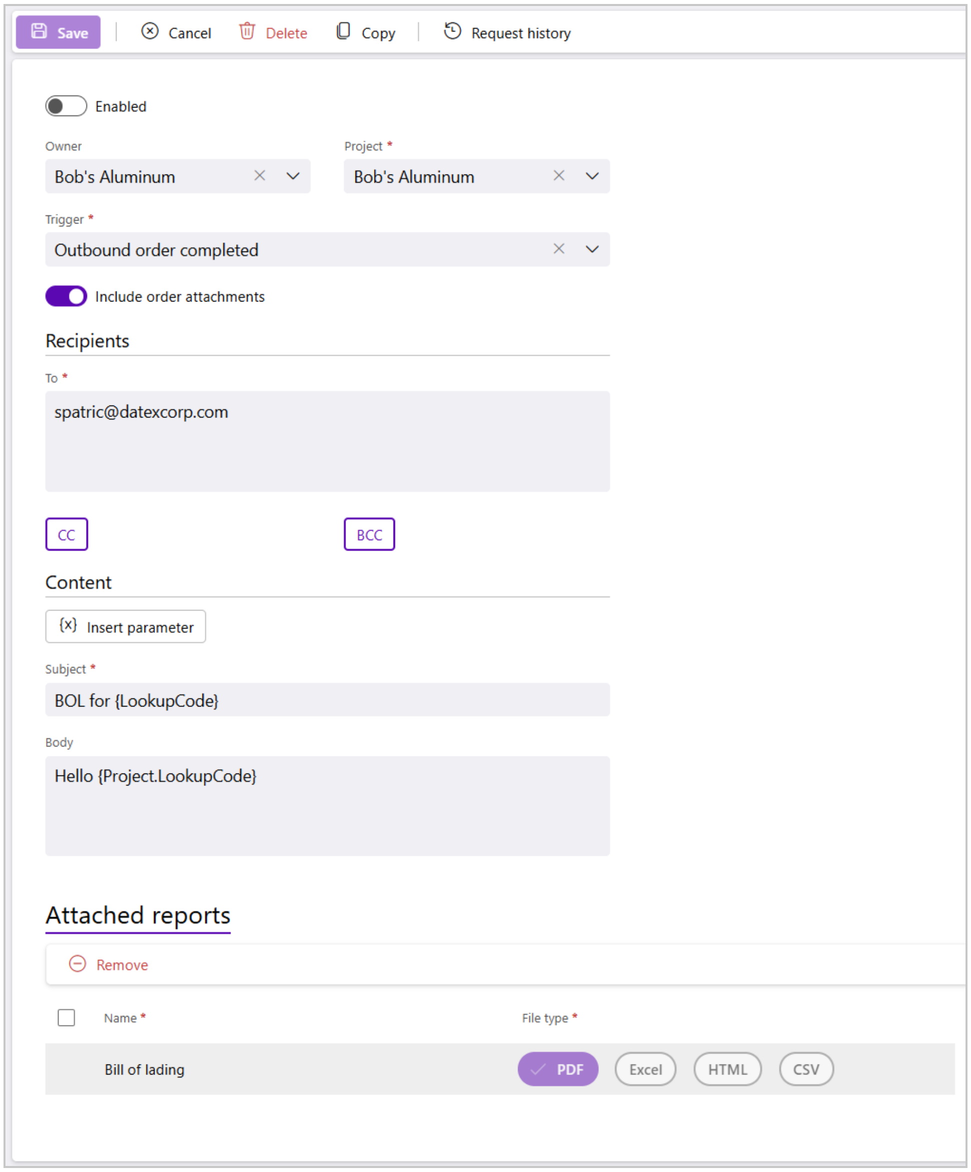
2. Once the row is checked and highlighted, click the **Copy** button. A window with a form will open.

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.



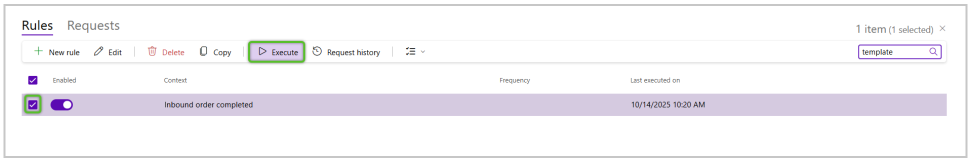
4. Once you've selected your target **Owner** and **Project** for the copied rule, click **Confirm**.

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.



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.

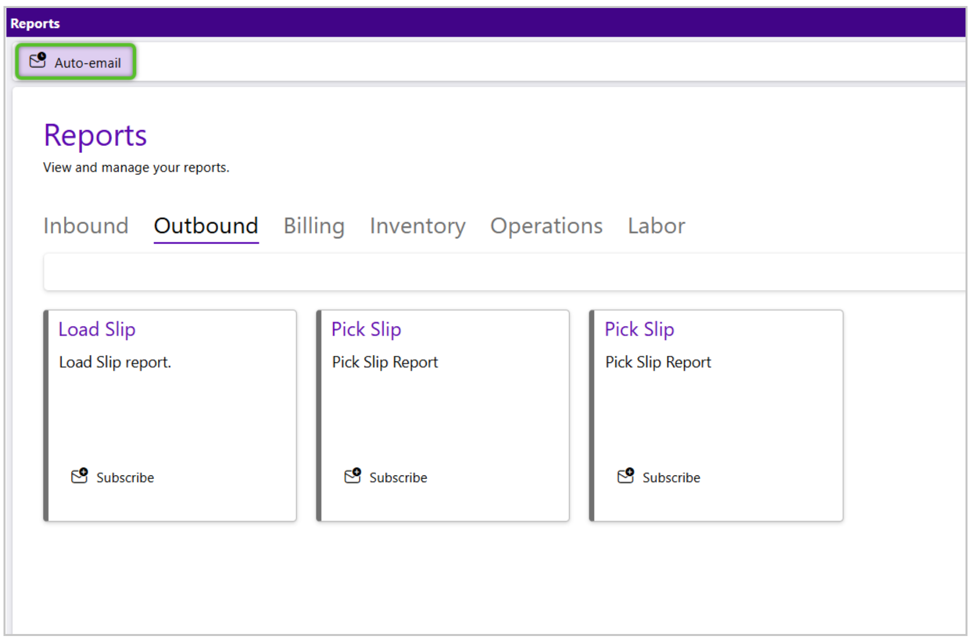
The rule will execute and a notification will display to let you know when it is complete. The notification will close on its own.

View and resend auto-emails

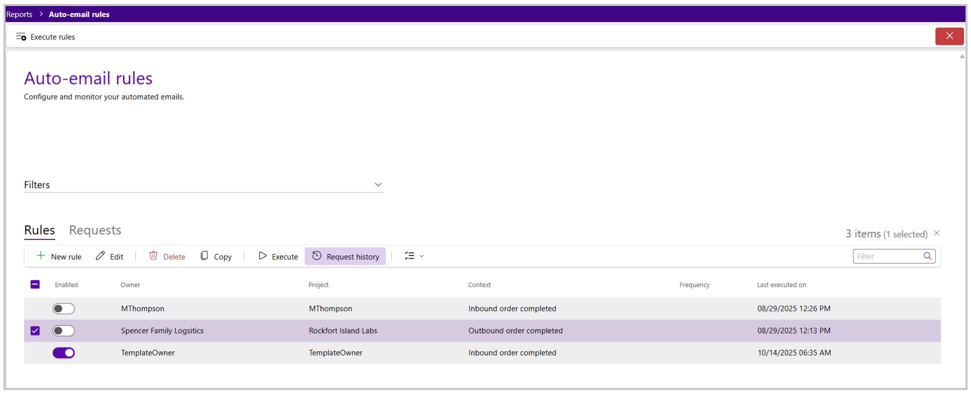
Emails can be **set up to send automatically** using multiple entities in Footprint Portal as a trigger, for example, completing a dock appointment. Sent emails can be viewed and resent from several locations on Footprint Portal following a similar process.

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

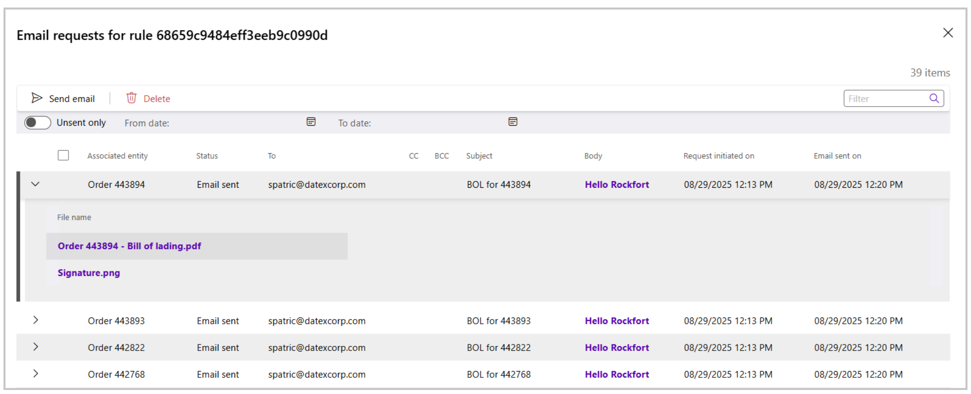
1. From the **Reports hub**, click the **Auto-email rule** button.



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

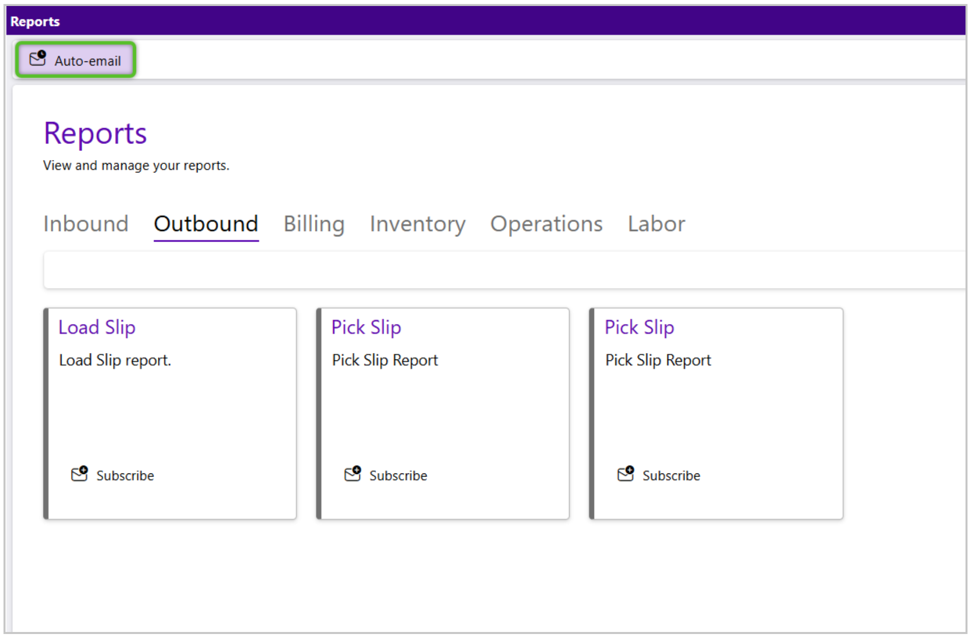


3. Click the **Request history button** to open the email history for the selected rule.



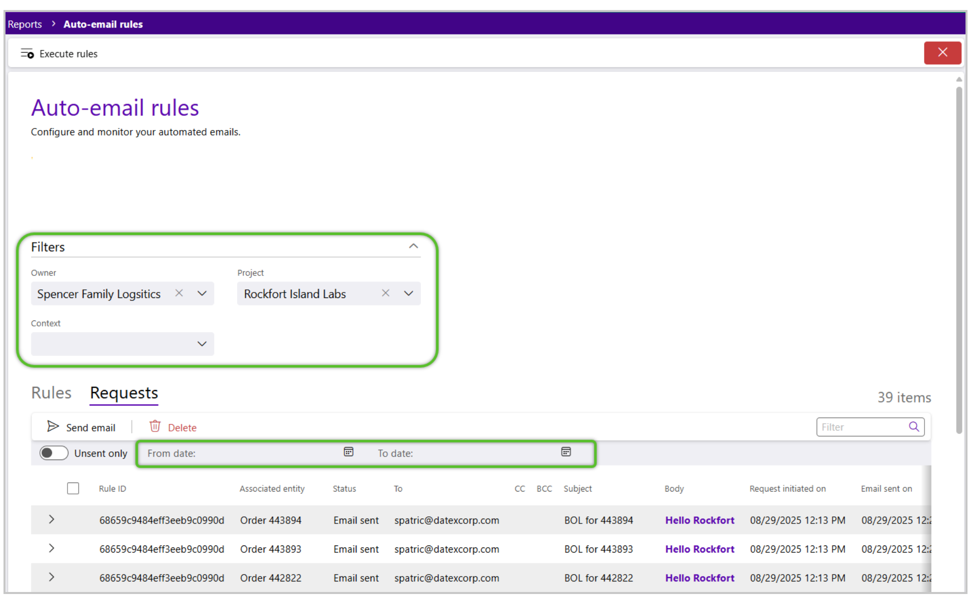
Open Requests tab of Auto-email rules hub

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



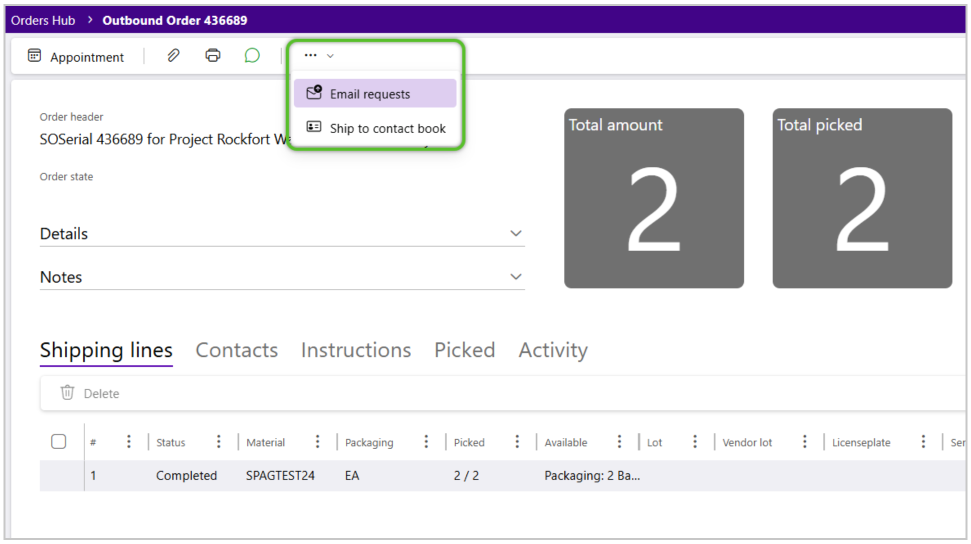
2. Click the **Requests** tab.

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.

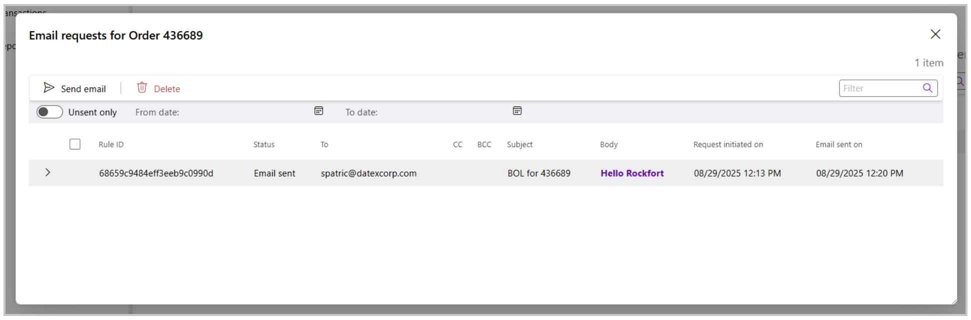


Open request history from an order

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



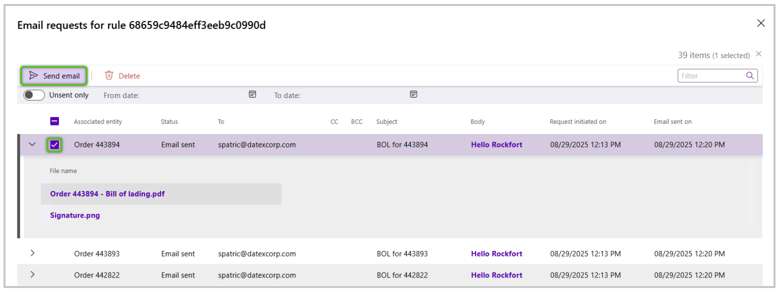
The email request history for the order will open.



Regardless of the method you use to get to a grid containing email requests, the steps the 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 form 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.

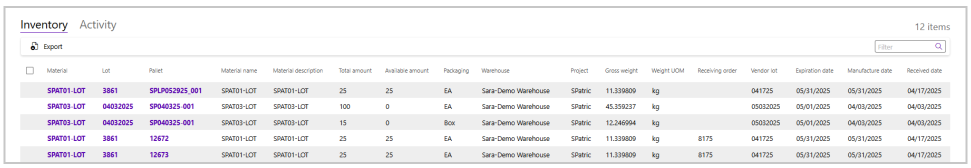
Search and filter options are available to quickly locate inventory for review and management. Users can filter by **Owner**, **Project**, **Materials**, and **Warehouse**.

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 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 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	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.

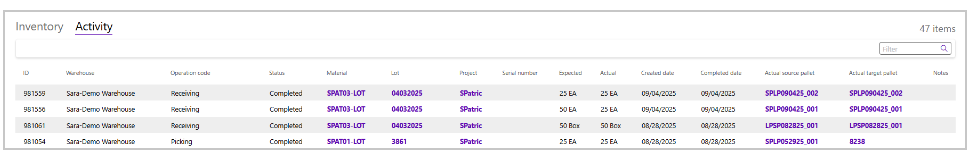
Project: The name of the project associated with the material inventory.

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

Filter

ID	Warehouse	Operation code	Status	Material	Lot	Project	Serial number	Expected	Actual	Created date	Completed date	Actual source pallet	Actual target pallet	Notes
981559	Sara-Demo Warehouse	Receiving	Completed	SPAT03-LOT	04032025	SPatric		25 EA	25 EA	09/04/2025	09/04/2025	SPLP090425_002	SPLP090425_002	
981556	Sara-Demo Warehouse	Receiving	Completed	SPAT03-LOT	04032025	SPatric		50 EA	25 EA	09/04/2025	09/04/2025	SPLP090425_001	SPLP090425_001	
981061	Sara-Demo Warehouse	Receiving	Completed	SPAT03-LOT	04032025	SPatric		50 Box	50 Box	08/28/2025	08/28/2025	LPSP082825_001	LPSP082825_001	
981054	Sara-Demo Warehouse	Picking	Completed	SPAT01-LOT	3861	SPatric		25 EA	25 EA	08/28/2025	08/28/2025	SPLP052925_001	8238	

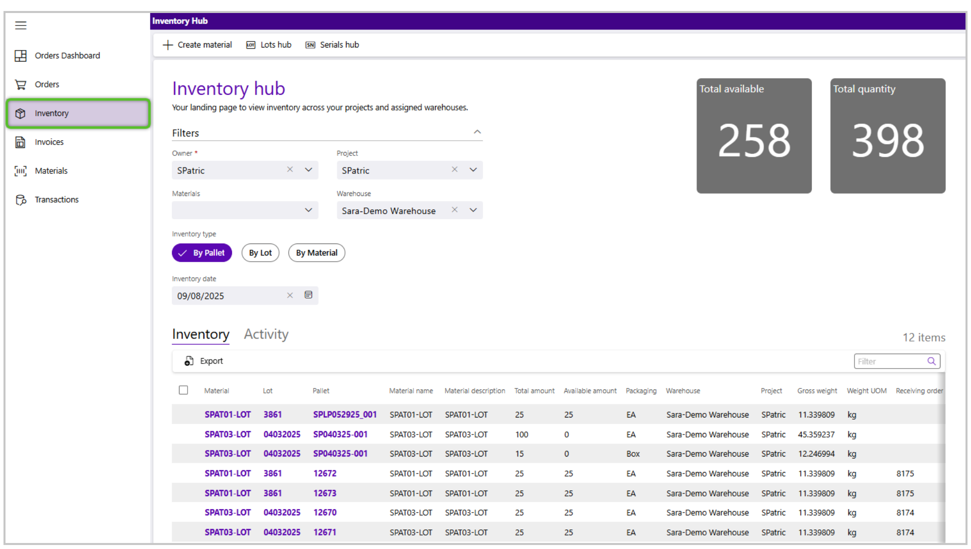
Activity tab details

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 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.

datex

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.

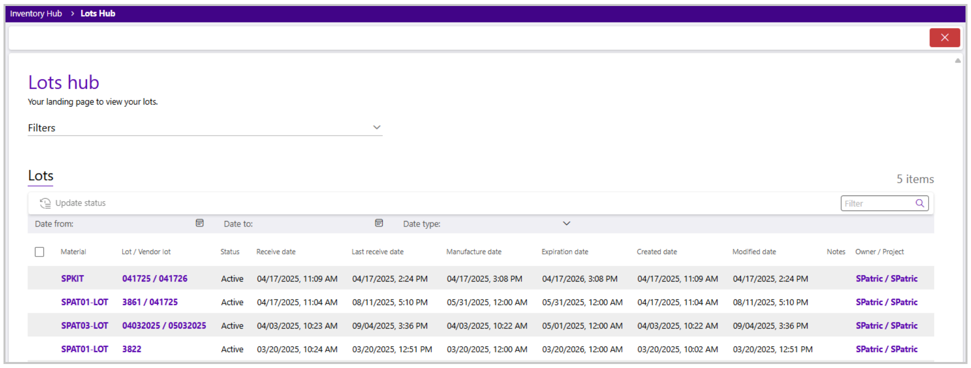
Lots hub details

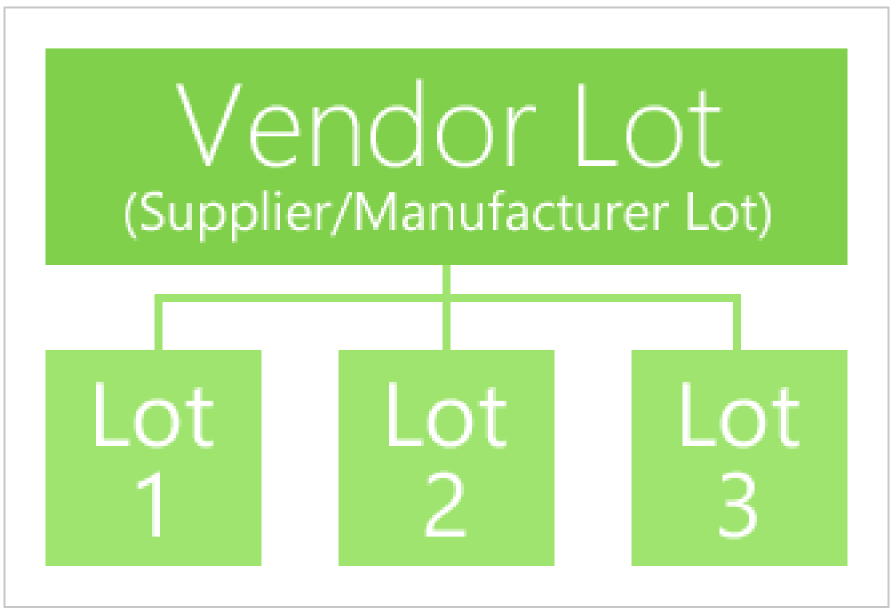
Material:	The lookup code for the lot's material.
Lot/Vendor Lot:	The lot and vendor lot lookup codes.
Status:	The status of the lot.
Receive Date:	The date and time the lot was first received into the warehouse.
Last Receive Date:	The date and time the lost was most recently received into the warehouse.
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



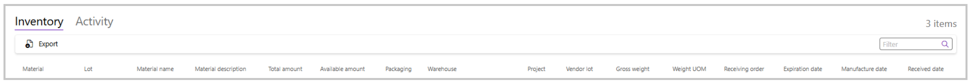


Lot record

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 gird can be exported.



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.

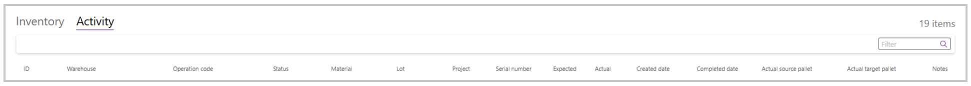
Expiration Date: The expiration date of the lot inventory.

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.



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.

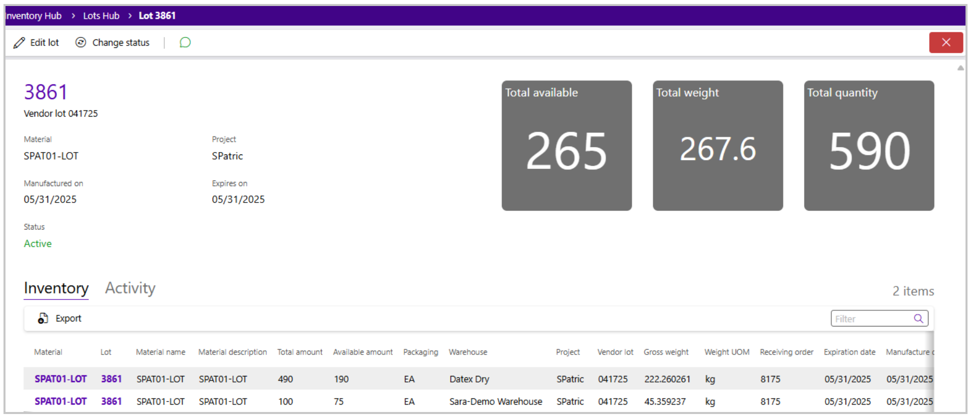
Actual target pallet: The actual pallet inventory ended on for the activity.

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]



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.

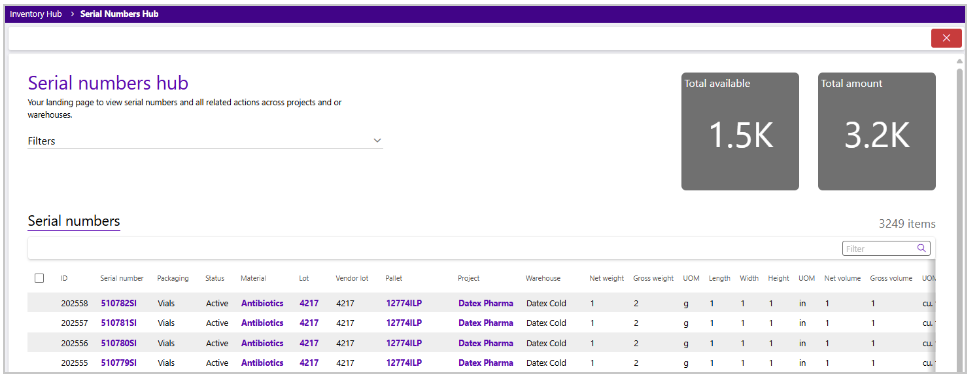
A unique history of the serial's activity history (detailing where the inventory has been at what time, its past Statuses, and so on) is also kept with the serial number.

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.

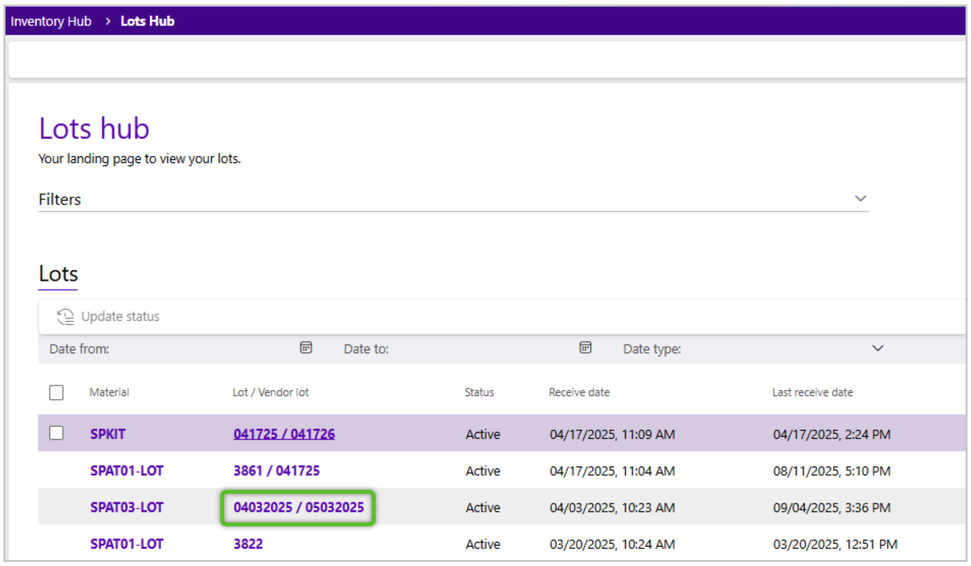
Notes: Any notes added to the serial number's record.



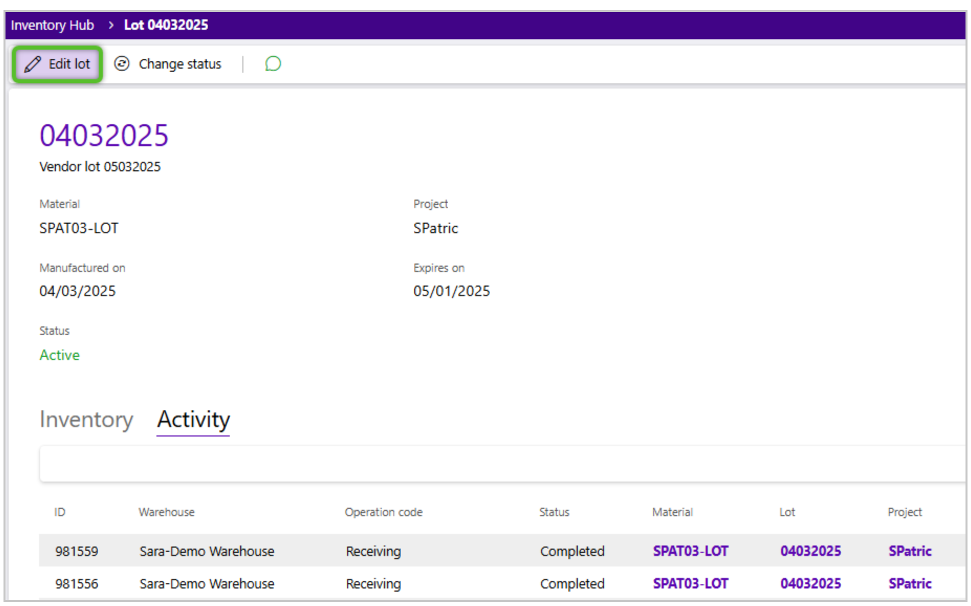
Edit lot information

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.

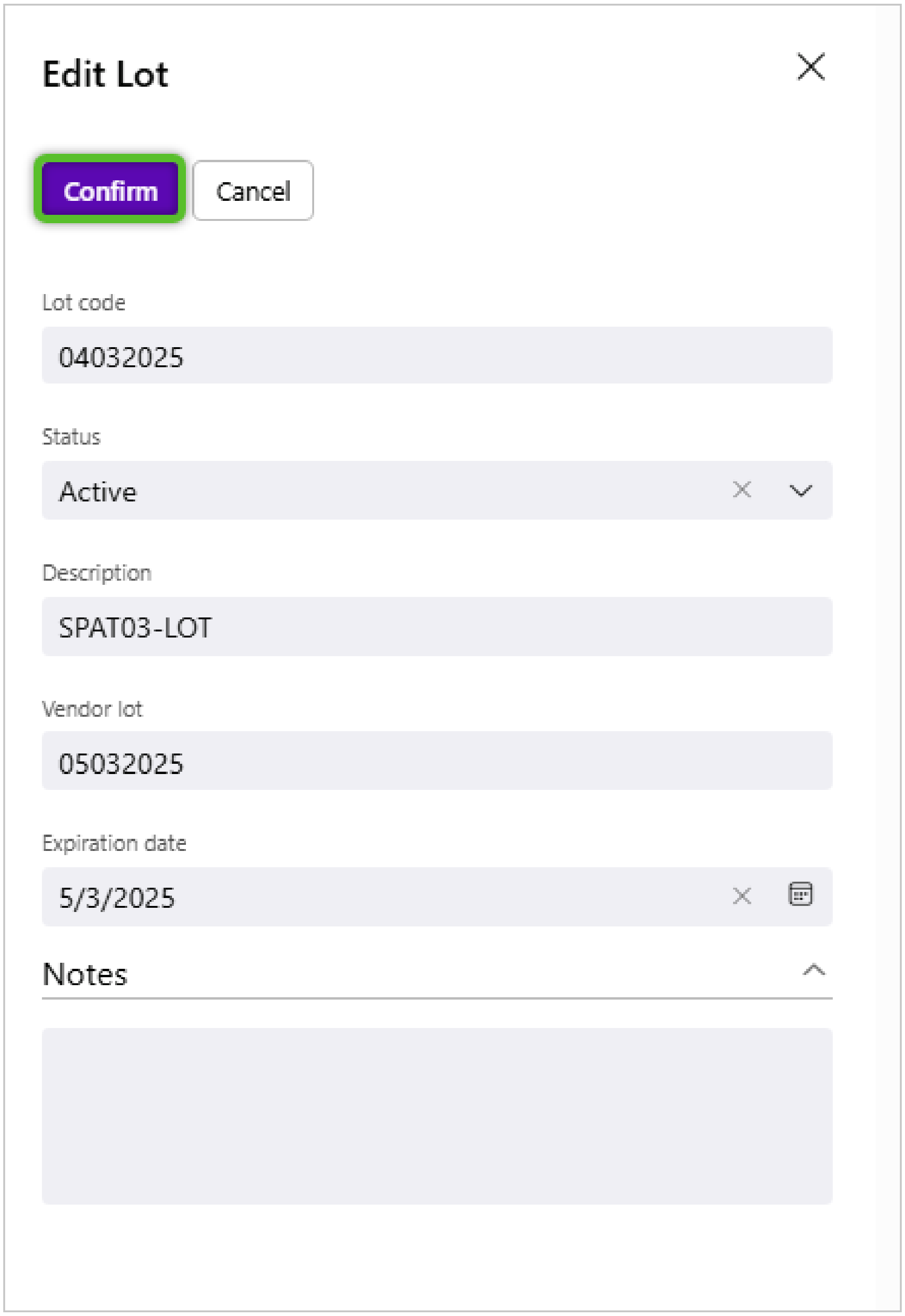


2. Click the **Edit lot** button to open the **Edit lot** flyout.



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.

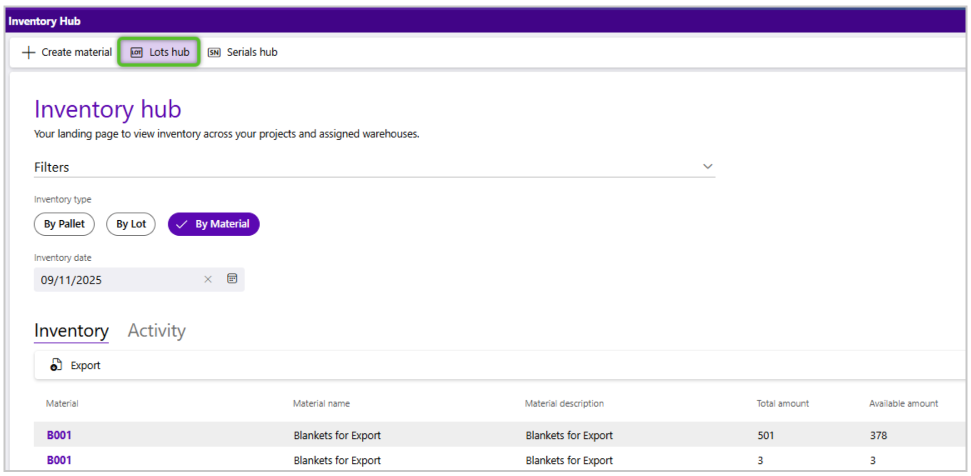


Change lot status

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.

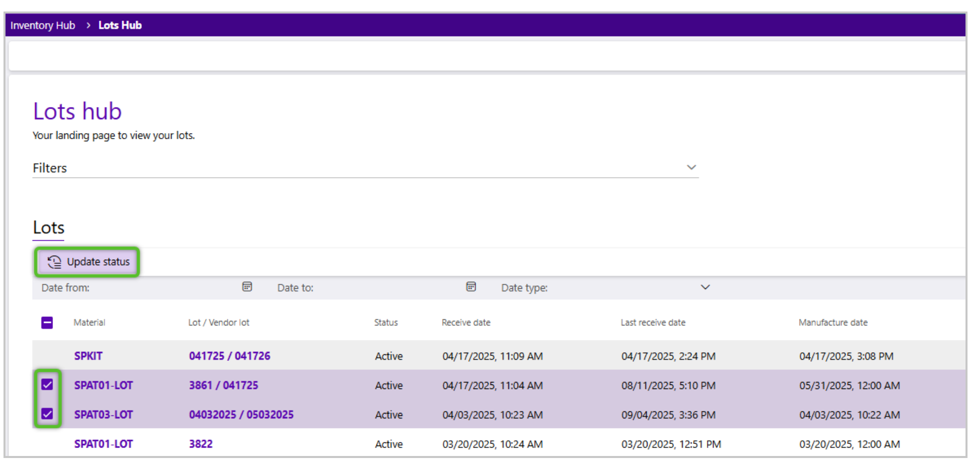
Update the status of the lot(s) from the Lot hub

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

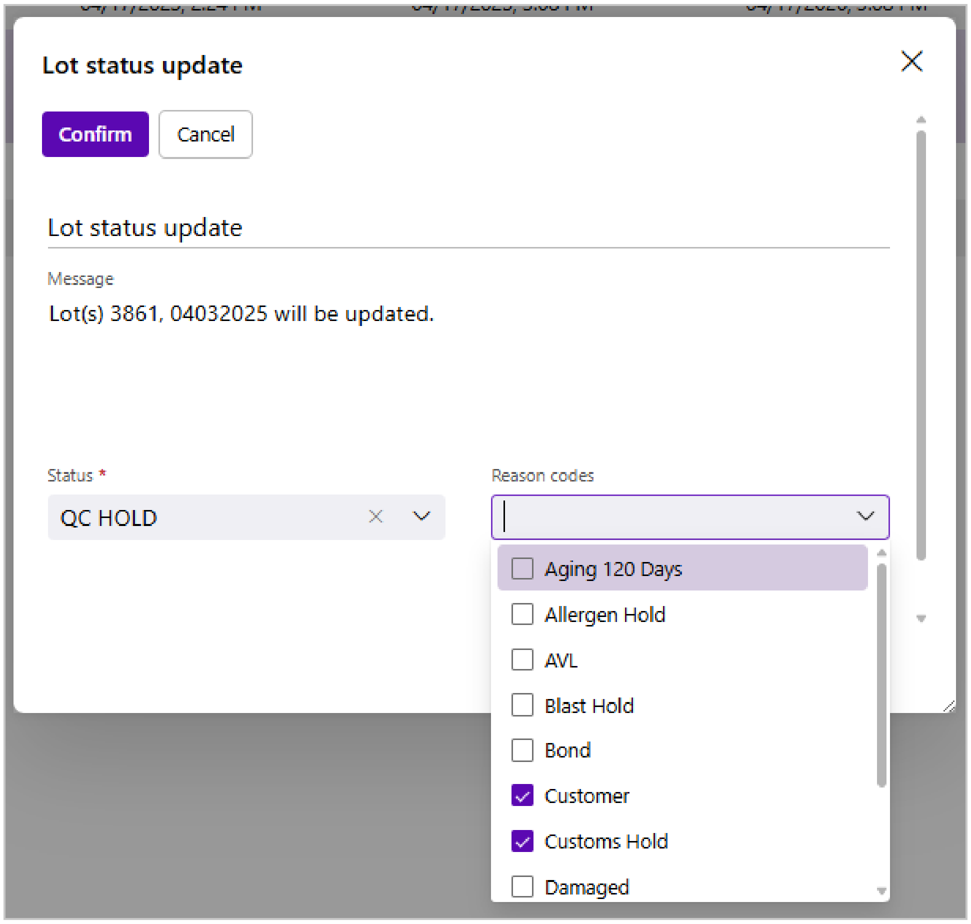


1. On the **Lots hub** in the **Lots** tab, locate the row(s) containing the lot(s) to have their statuses updated, and click the **Update status** button.

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.

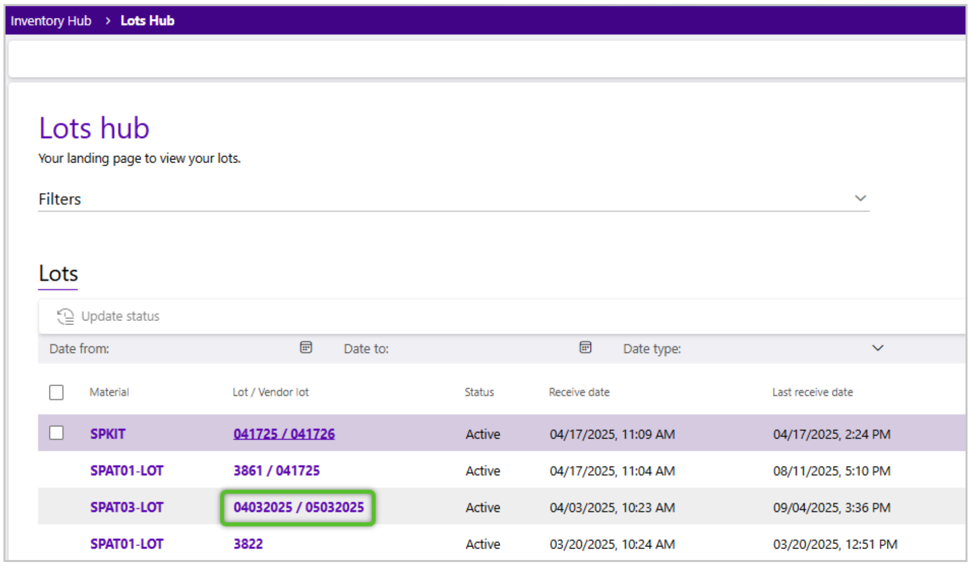


3. After the status update processes, click the **OK** button to close the confirmation window.

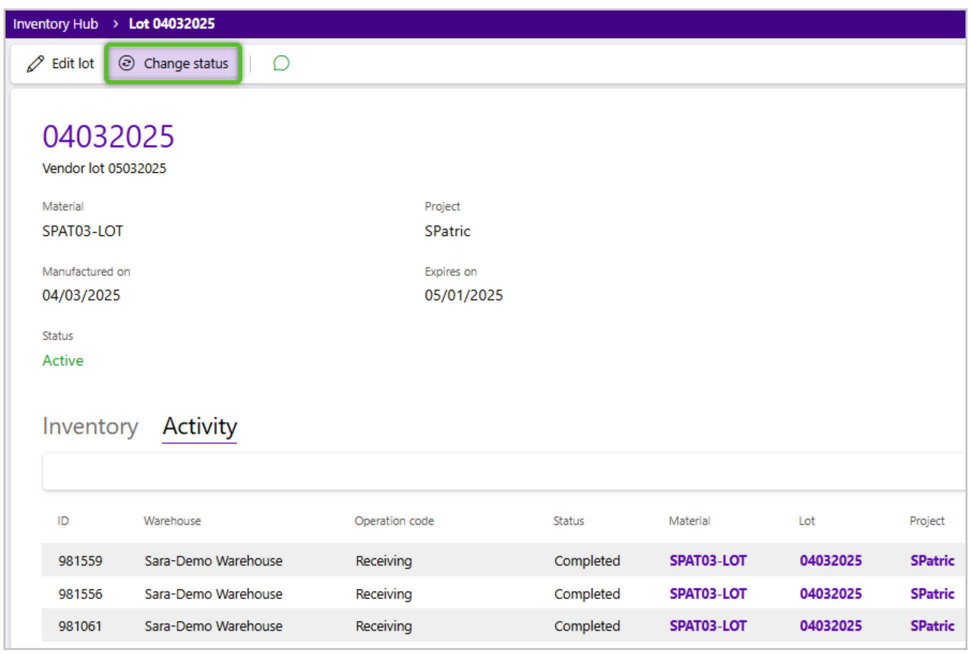
The changed status of the lot(s) will be reflected in the grid.

Update the status of a lot from the lot record

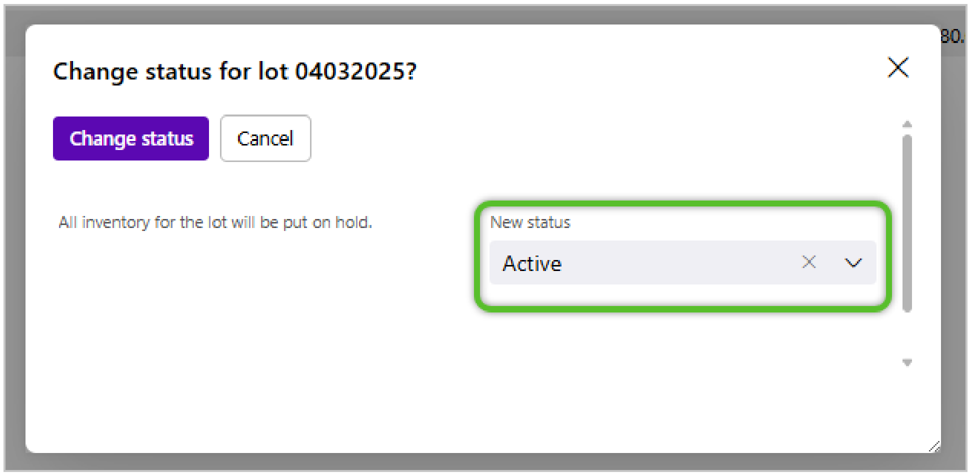
1. Open a lot record from any grid where its lookup code appears as a hyperlink.



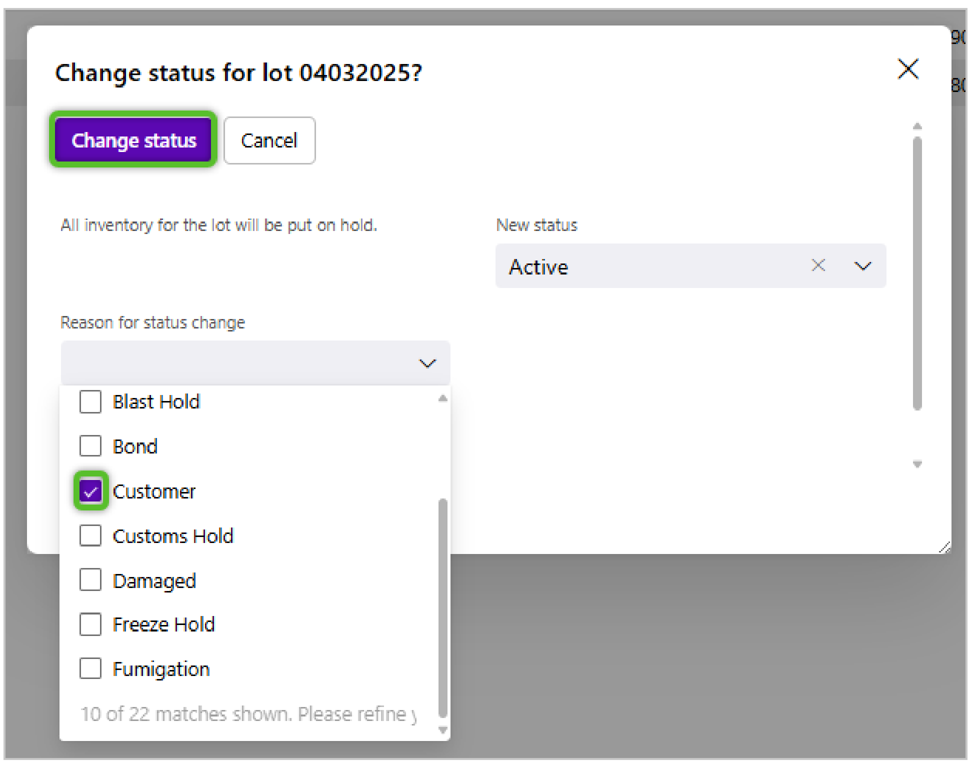
2. In the lot record, click the **Change status** button in the red toolbar along the top.



3. Set the **New status**.



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.

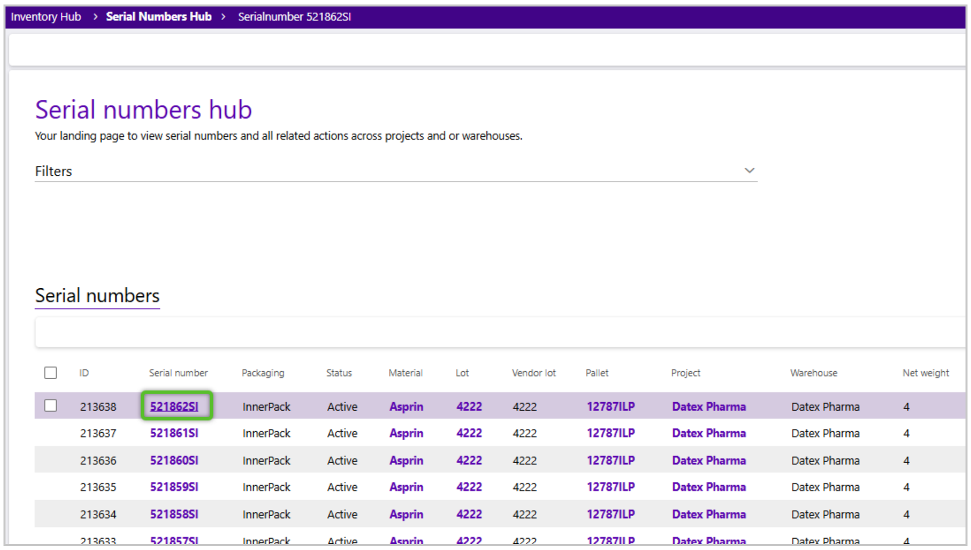


The status update will process and be reflected in the record.

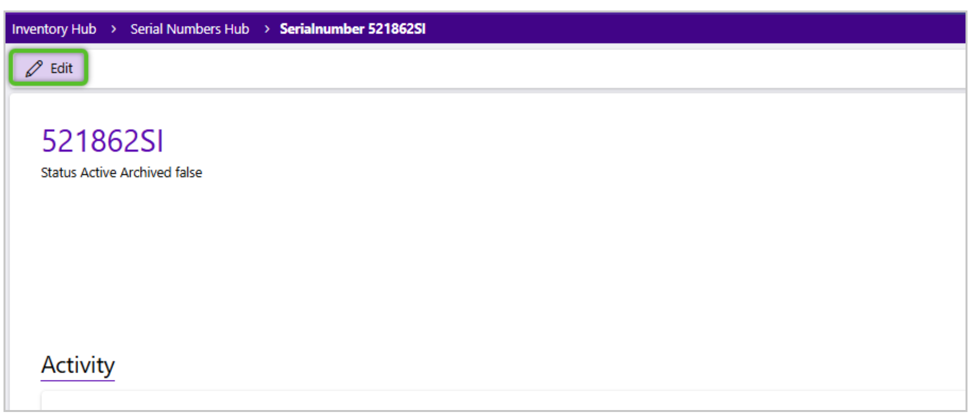
Edit serial information

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.

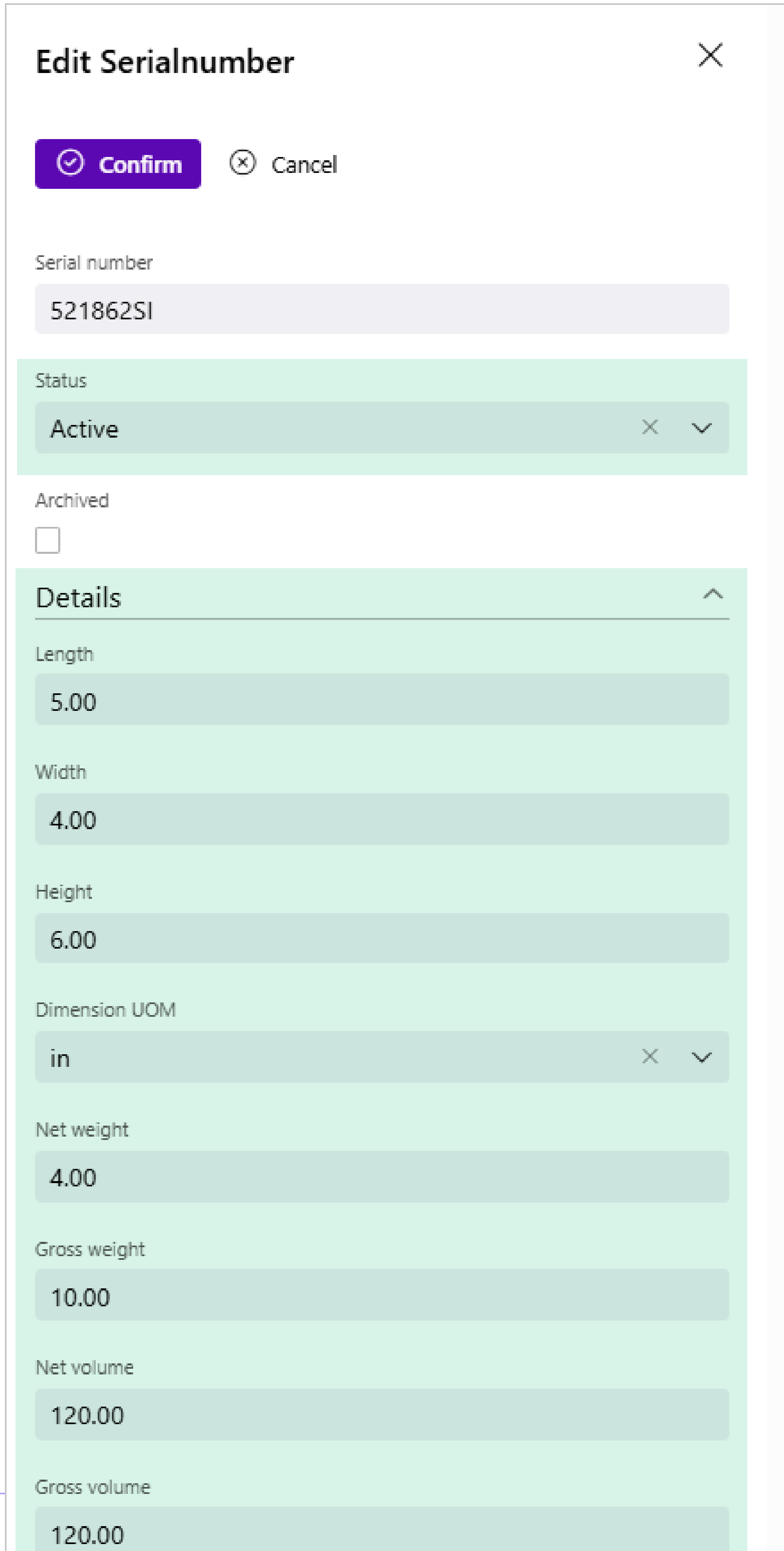


2. Click the **Edit** button to open the **Edit lot** flyout.



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

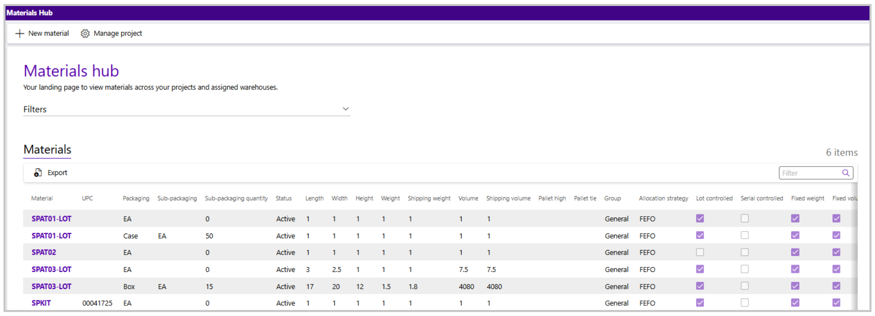
Materials are the most basic part of your Warehouse, and the reason you have a Warehouse in the first place - Materials are how you define your **inventory**.

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.



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.

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).

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

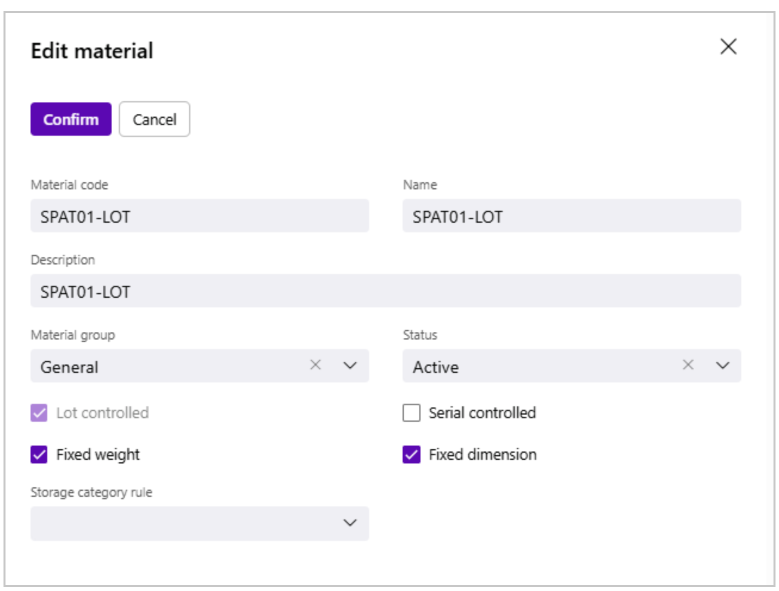
Edit material details

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

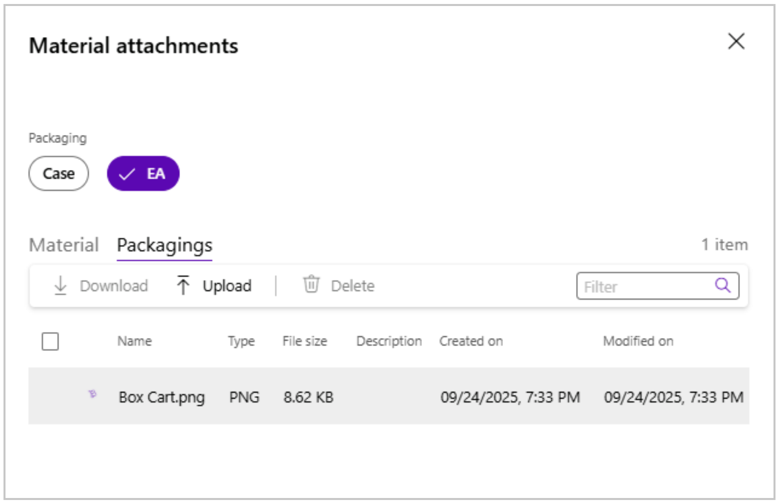


Material code:	A short code to identify the material by, unique to the Project. If using barcodes, the material's barcode would go here.
Name:	The name of the material.
Description:	A short description of what the material is.
Material group:	The material's assigned material group. Commonly used to associate 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

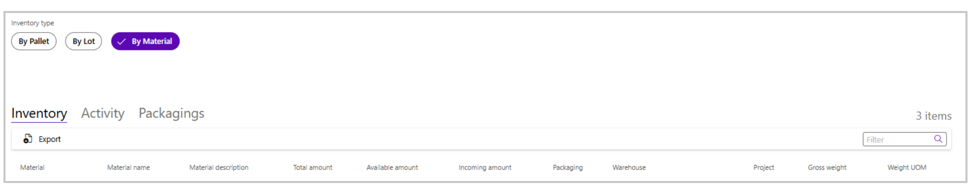
The material **Inventory** tab lists all available instances of the selected material.

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

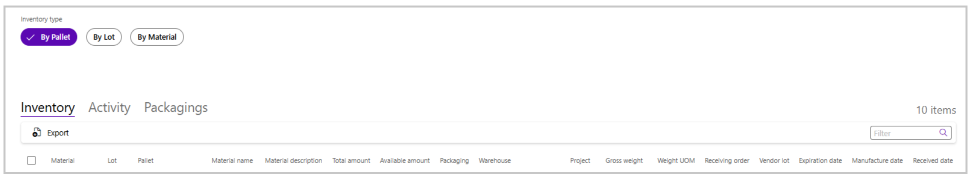
By Material



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.

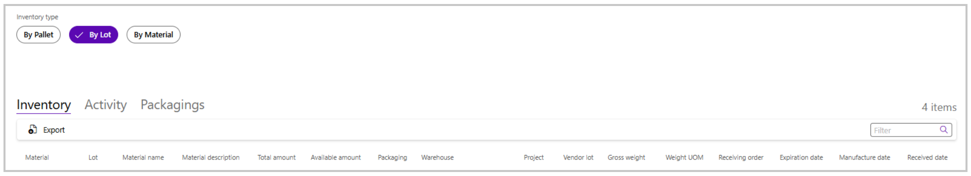
Incoming amount:	The amount of inventory on incoming purchase orders that has not yet been received.
Packaging:	The packaging level of the inventory in the line.
Warehouse:	The warehouse in which the material is located.
Project:	The project the material is assigned to.
Gross weight:	The total weight 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.

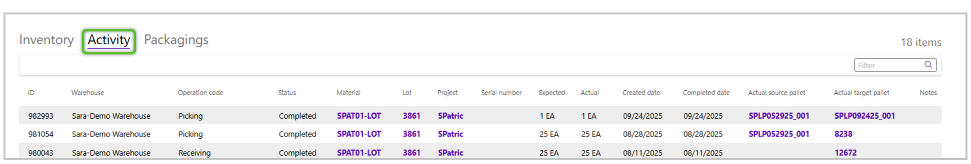
By Lot



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.



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.

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.

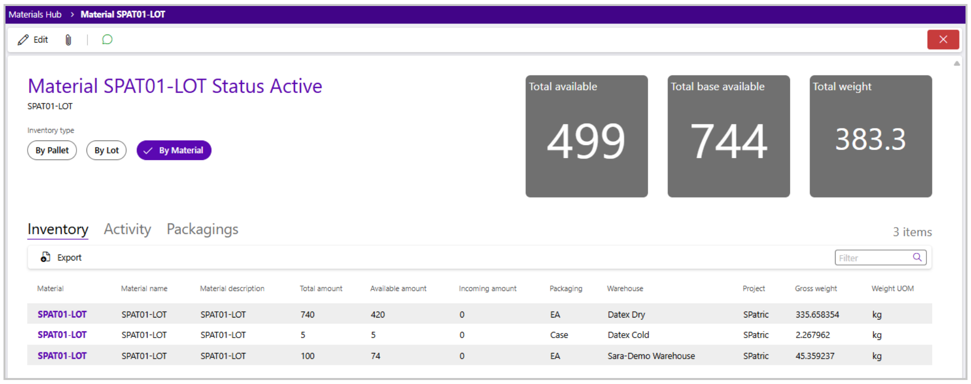
Pallet high: How many units high the selected material packaging can be stacked atop itself.

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.**

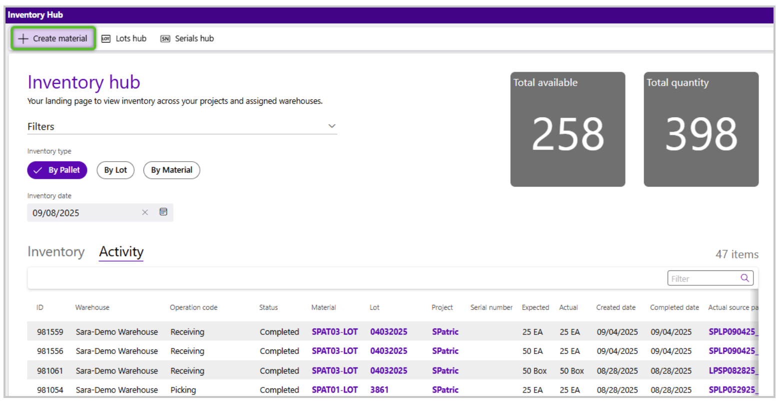


Create a Material

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 **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.

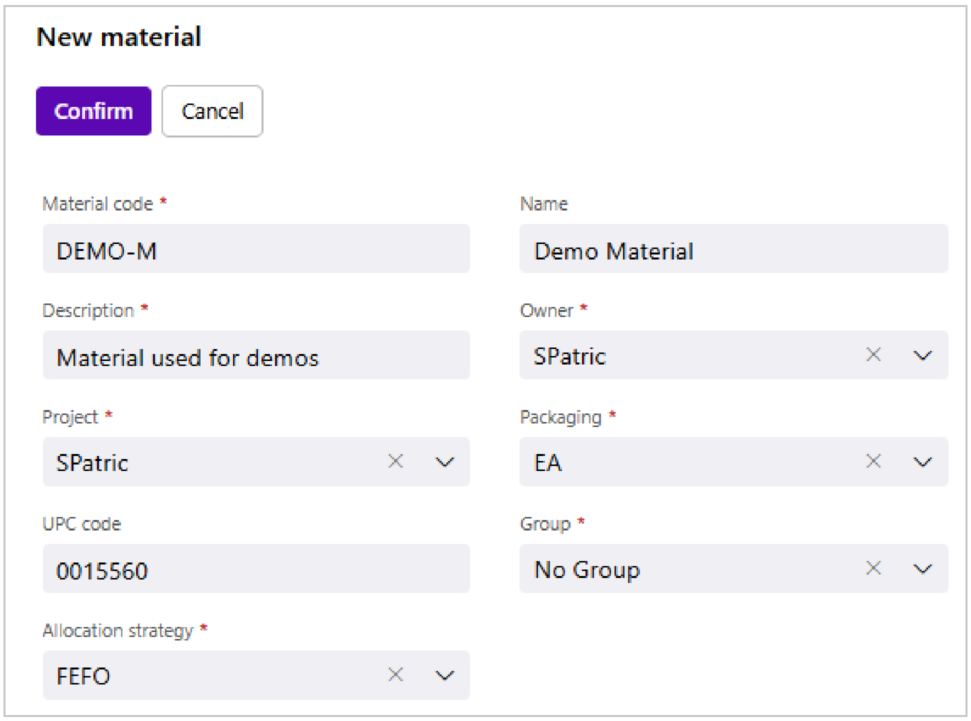
2. In the first section of the form, enter a required short **Material code** that will be used to reference the material, along with a **Description** of the material. You may add an optional **Name** that could also be used as an additional identifier.

❏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.



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).

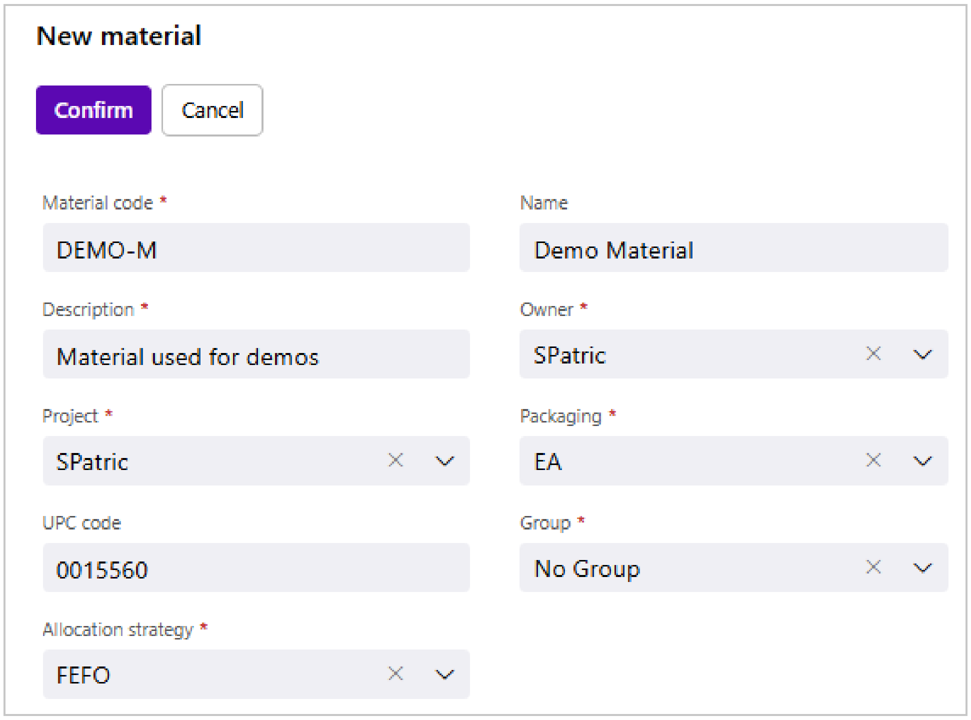
Allocation Strategies

- **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.



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.

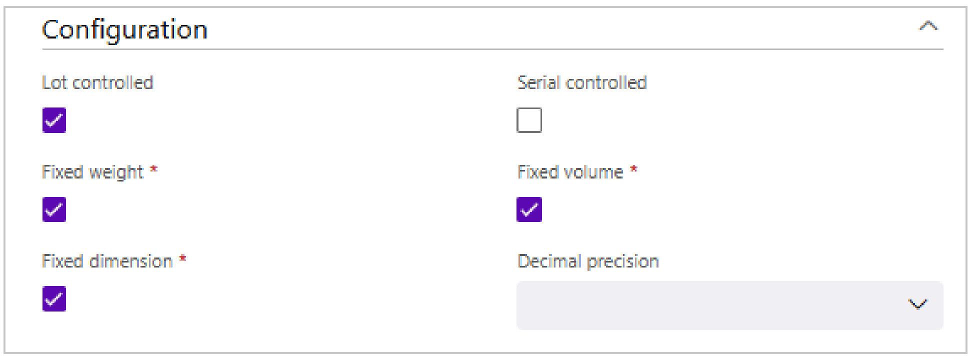
If tracking of lots/serial numbers is not required, leave both toggles off. In such cases inventory for the lot will be assigned a Generic Lot, or GLot and not utilize serial numbers.

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

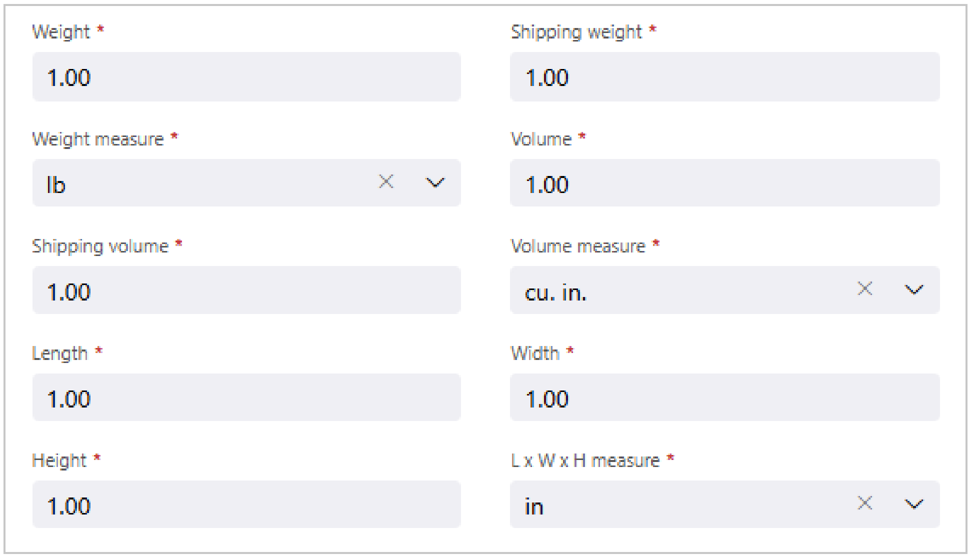
Once you have inventory for this material in the system you will not be able to change these values, so be certain of the whether or not the material will be lot and/or serial controlled and will have a fixed weight or volume.



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**.

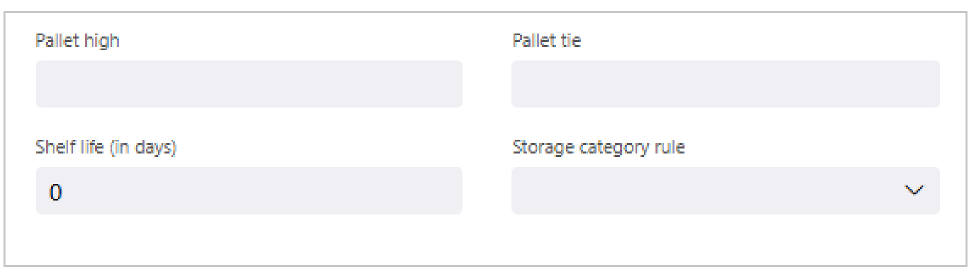


12. (Optional)Enter the **Pallet High** and **Pallet Tie**.

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.



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

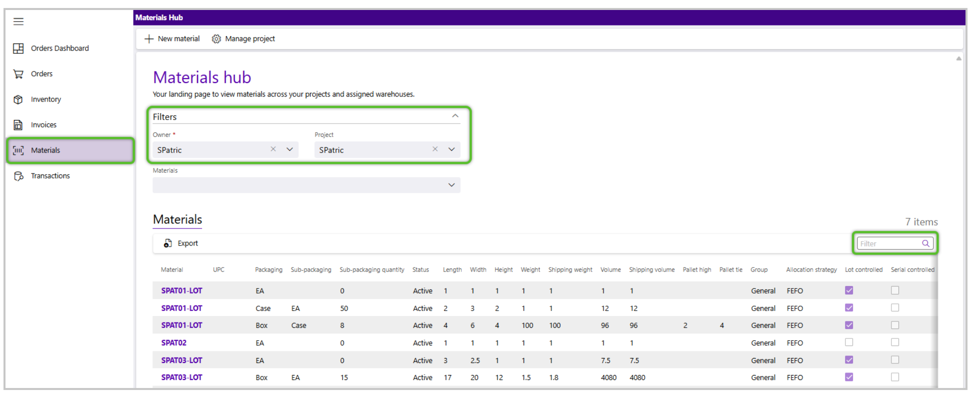
Once a Material has been created edits can still be made, however once inventory has been added for the material, **Lot controlled**, **Serial controlled**, **Fixed weight**, **Fixed volume**, and **Fixed dimensions** cannot be changed.

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

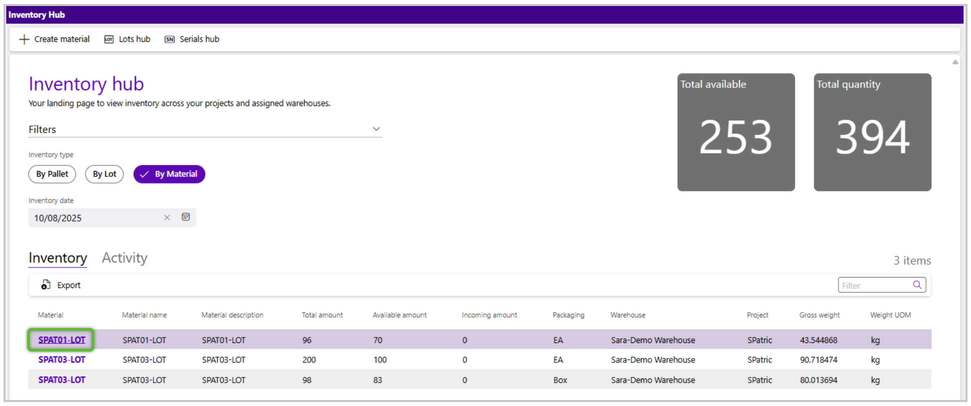
Option A, Step 1: Open the **Materials hub**. If the material you're looking for is not immediately visible in the grid, input the material's lookup code in the search field on the top right corner of the Materials grid then either click the Tab key or click outside of the field. The material will be



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.

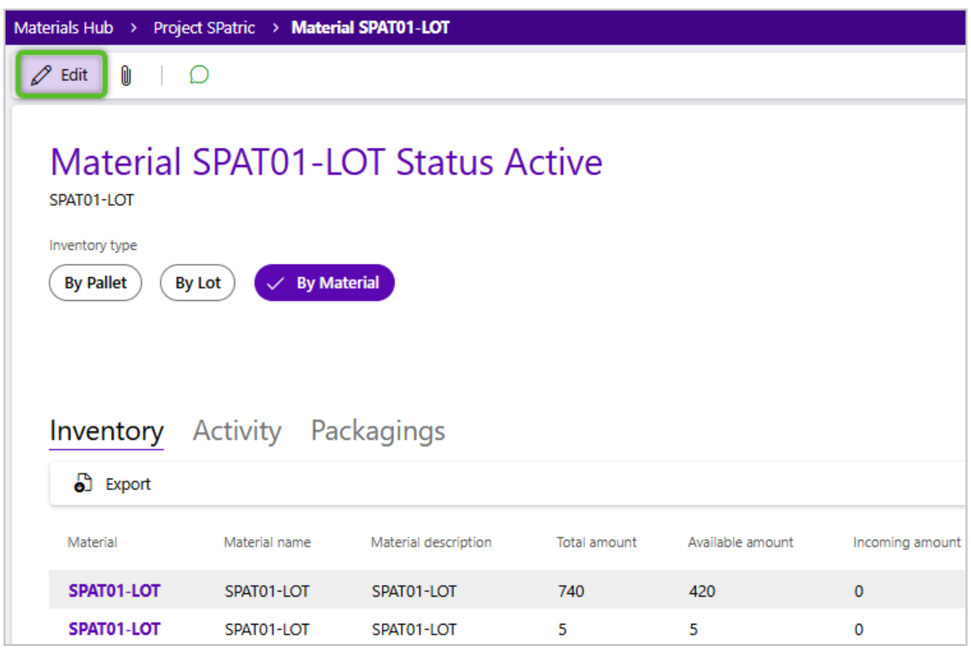
Option A, Step 3. If the material you're looking for is not immediately visible in the grid, input the material's lookup code in the search field on the top right corner of the **Materials** grid then either click the Tab key on your keyboard or click outside of the field. The grid will be filtered to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



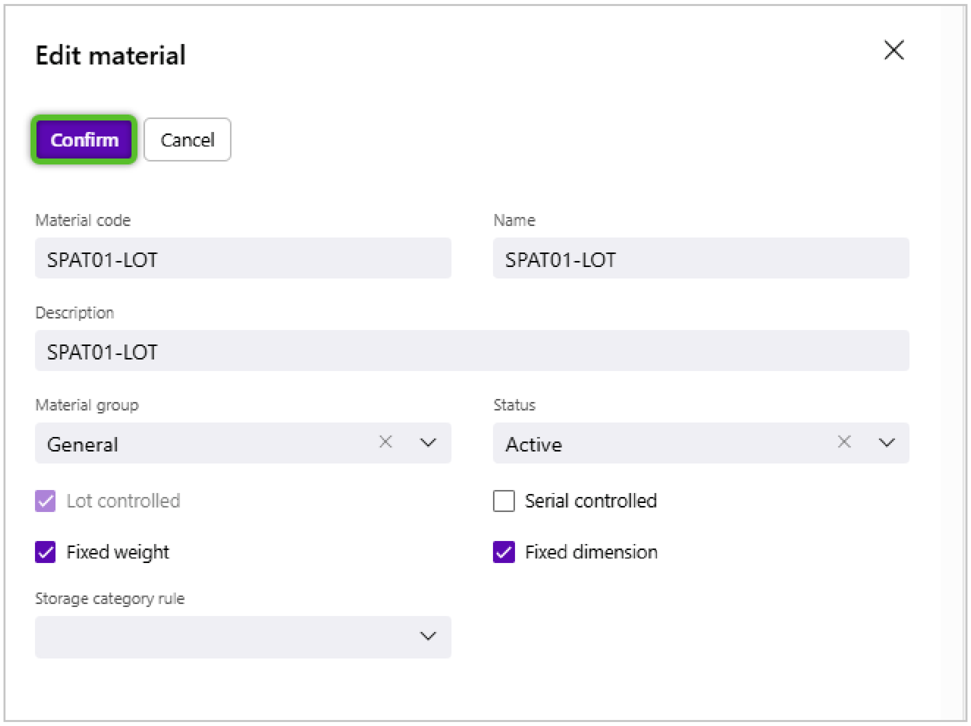
Edit a material

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



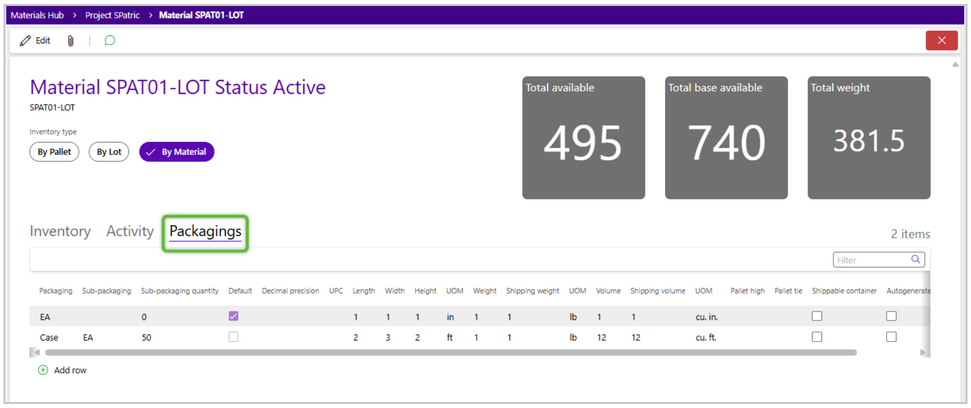
2. Edits can be made to most of the fields with the exception of the **Lot controlled**, **Serial controlled**, **Fixed weight**, and **Fixed dimension**. If there is inventory for the material in the warehouse or expecting in the warehouse on an incoming receiving order these fields cannot be updated 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.



Add a packaging level

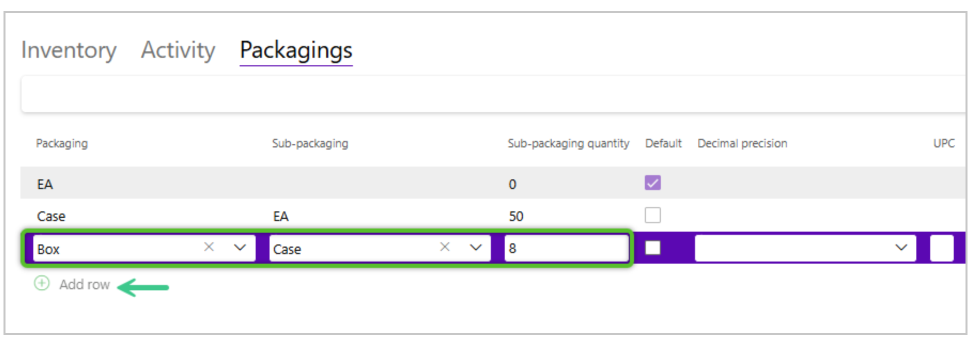
1. In the material record, click the **Packagings** tab.



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.

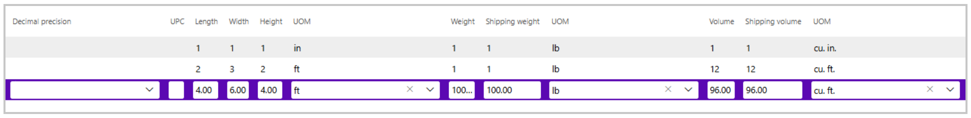
4. After selecting the packaging identify the packaging level for the material that is directly below the new level from the **Sub-packaging** drop down, and indicate the amount of that packaging that would be inside in the **Sub-packaging quantity**.



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.

datex

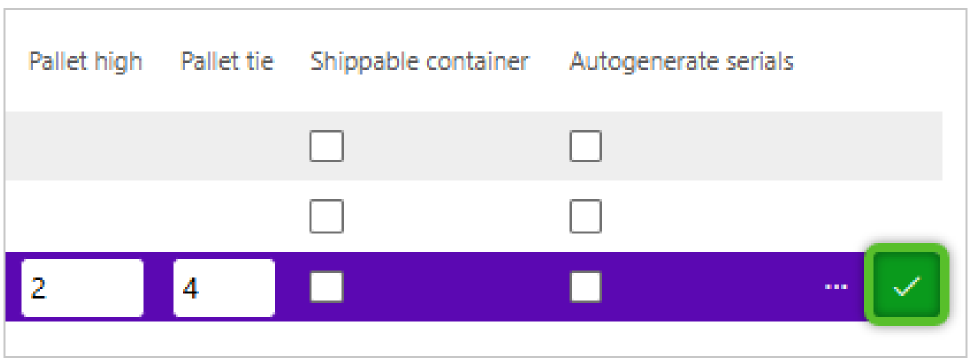
6. If the material has set measurement values (weight, volume, and dimensions) provide the values for each as applicable.



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).

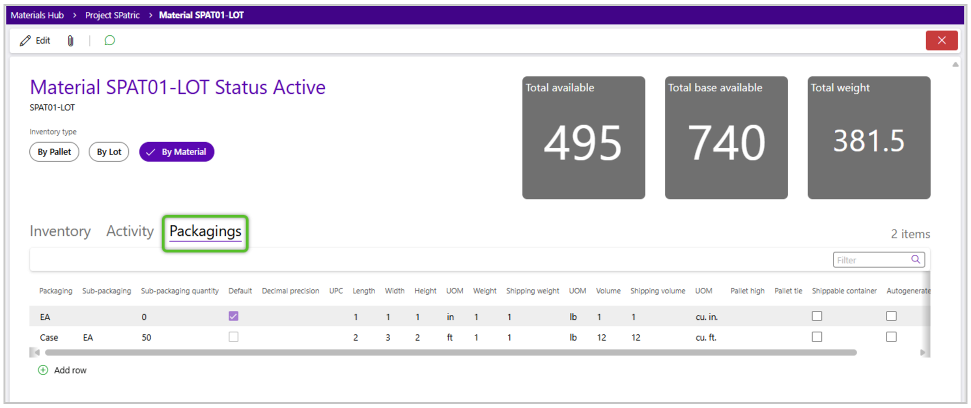
8. (Optional): Select if this is a **Shippable container** (it can be shipped without being packed), or if the material was serial controlled if this packaging level should **Autogenerate serials**.

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



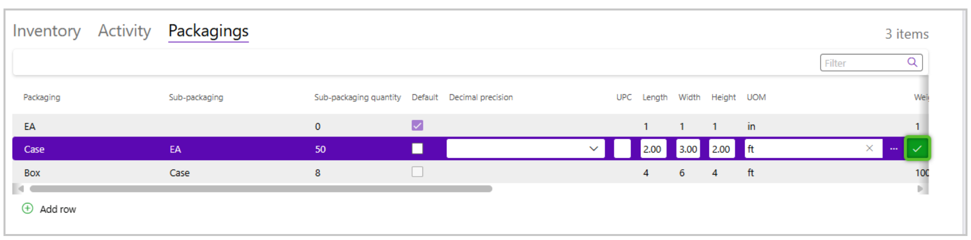
Edit a packaging level

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



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.



Invoices guide

Sections

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 gird. 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

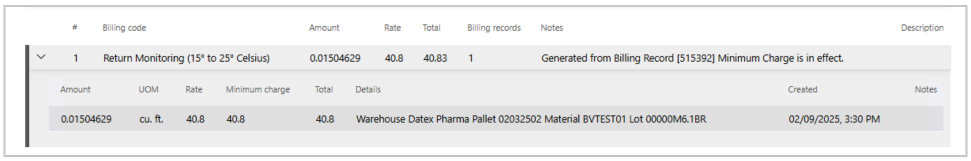
The invoice's basic information will be displayed in the header. The **Details** section can be opened for more information about the invoice.

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.



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.

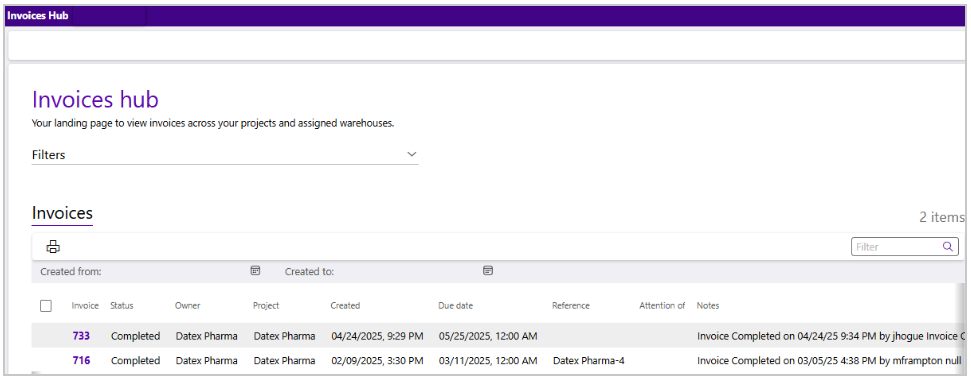
datex

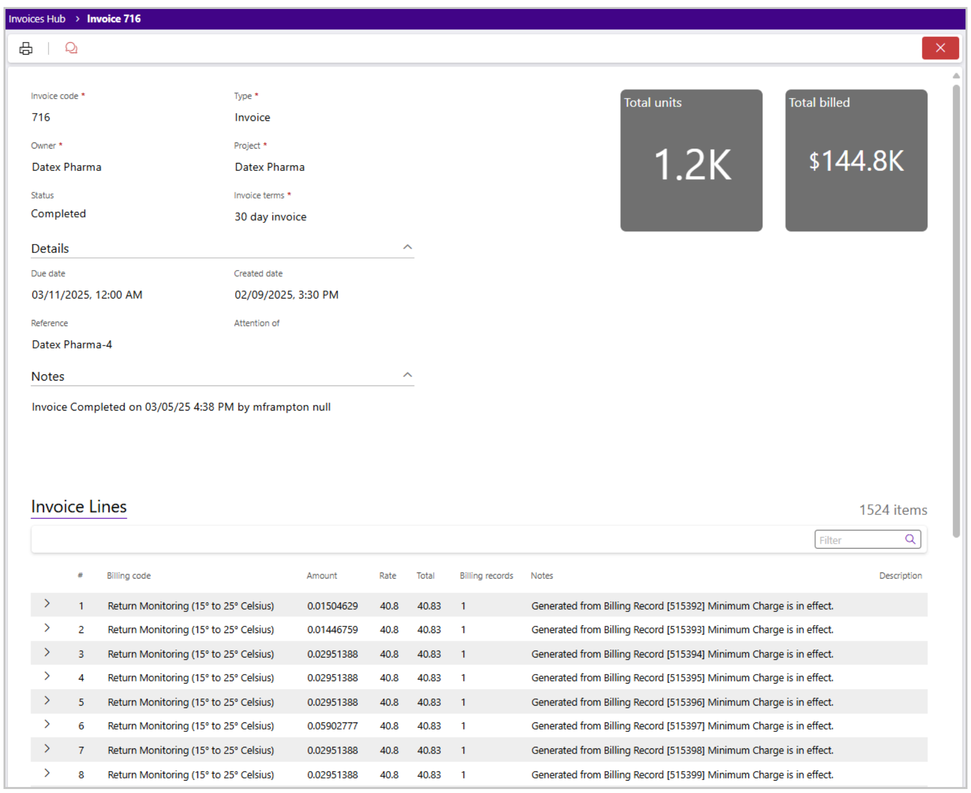
Total: The total charge for the invoice line.

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.





Portal Transaction hub guide

Sections

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 it's 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.

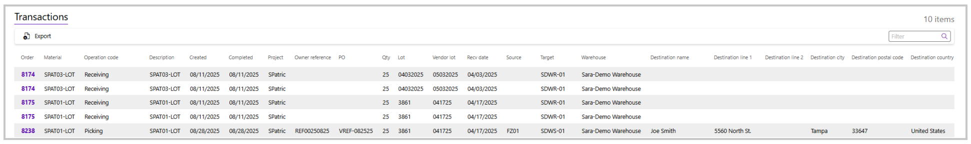
Filter options are available to specify the transactions you'd like to see. You may filter by **Owner**, **Project**, **Materials**, **Warehouse**, **Created from**, **Created to**, and **Operations codes**.

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

Export

10 items

Filter

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	Destination line 2	Destination city	Destination postal code	Destination country
8174	SPAT03-LOT	Receiving	SPAT03-LOT	08/11/2025	08/11/2025	SPatric			25	04032025	05032025	04/03/2025		SDWR-01	Sara-Demo Warehouse						
8174	SPAT03-LOT	Receiving	SPAT03-LOT	08/11/2025	08/11/2025	SPatric			25	04032025	05032025	04/03/2025		SDWR-01	Sara-Demo Warehouse						
8175	SPAT01-LOT	Receiving	SPAT01-LOT	08/11/2025	08/11/2025	SPatric			25	3861	041725	04/17/2025		SDWR-01	Sara-Demo Warehouse						
8175	SPAT01-LOT	Receiving	SPAT01-LOT	08/11/2025	08/11/2025	SPatric			25	3861	041725	04/17/2025		SDWR-01	Sara-Demo Warehouse						
8238	SPAT01-LOT	Picking	SPAT01-LOT	08/28/2025	08/28/2025	SPatric	REF00250825	VREF-082525	25	3861	041725	04/17/2025	FZ01	SDWS-01	Sara-Demo Warehouse	Joe Smith	5560 North St.		Tampa	33647	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.