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Footprint WMS

Footprint WMS is your main hub for all your warehouse needs. Creating and managing inventory and orders, system configuration, reporting, and more are all handled here. More documentation is in the works.

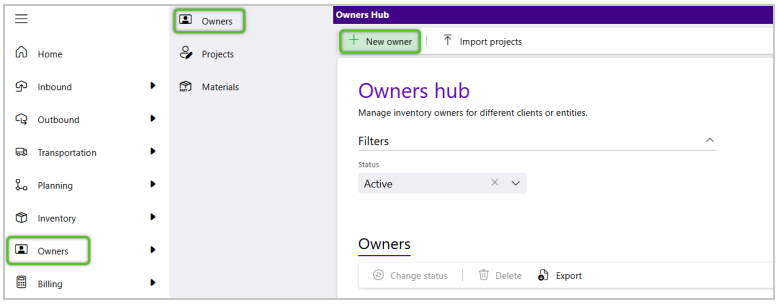
Create Owners

Owners represent anyone who owns inventory in a warehouse. Owners will have one or more **Projects**, each representing a grouping of related **Materials**.

1. Click **Owners** in the left navigation menu, then select **Owners**.

The **Owners Hub** will display.

2. Click **+ New Owner** in the top menu.



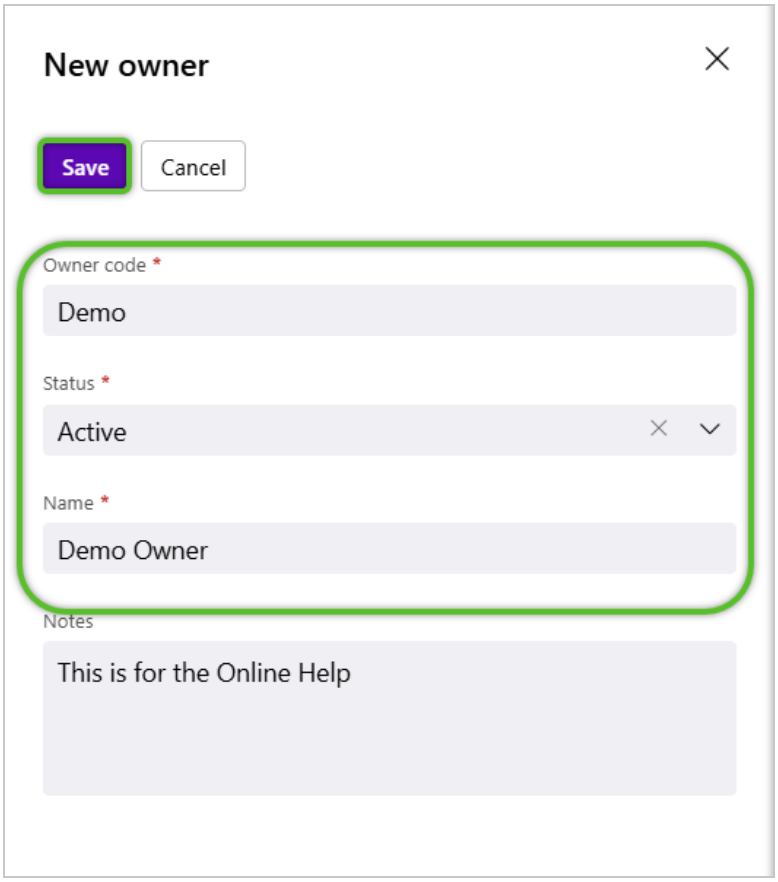
3. In the **Create Owner** window, enter a short **Owner Code**.

The **Status** is set to **Active** by default.

4. Enter a **Name** for the new Owner.

5. Enter any optional **Notes**.

6. Once all the new Owner details have been entered, click the **Save** button.



The new Owner will now be available for use and management.

For more details on managing Owners in Footprint, please visit our **How to Manage Owners** article.

Create a Project

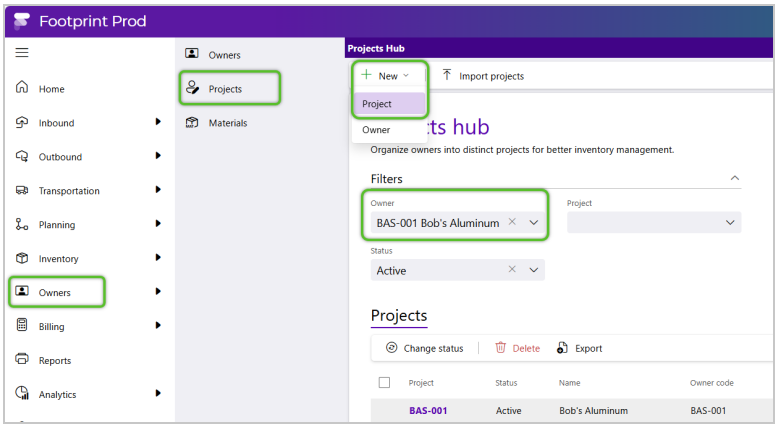
Owners will have one or more **Projects**, each representing a grouping of related Materials. **Projects** are also used for billing purposes.

1. Click **Owners** in the left navigation menu, then select **Projects**.

The **Projects Hub** will display.

2. Click the arrow icon to open the project **Filters**.

3. Select an **Owner**, then click **+ New Project** in the top menu.



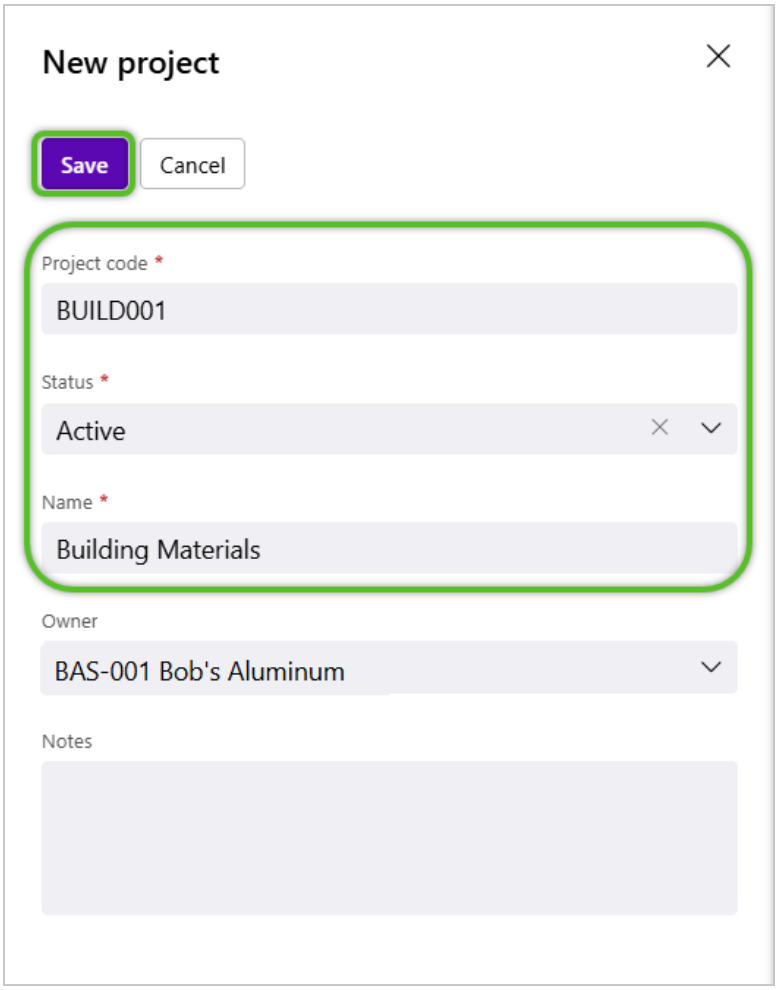
4. In the **Create Project** window, enter a required short **Project Code**.

The **Status** is set to **Active** by default.

5. Enter a required **Name** for the Project.

6. Enter any optional **Notes**.

7. Once all the new Project details have been entered, click the **Save** button.



The new Project will now be available for use and management.

For more details on managing Projects in Footprint, please visit our **How to Manage Projects** article.

Import Projects

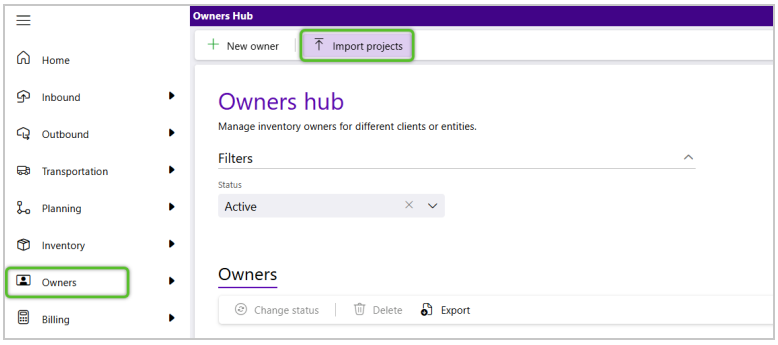
Imported Projects will appear alongside other Projects for review and management.

Please Note

- For the most comprehensive import, we recommend downloading the latest export 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.

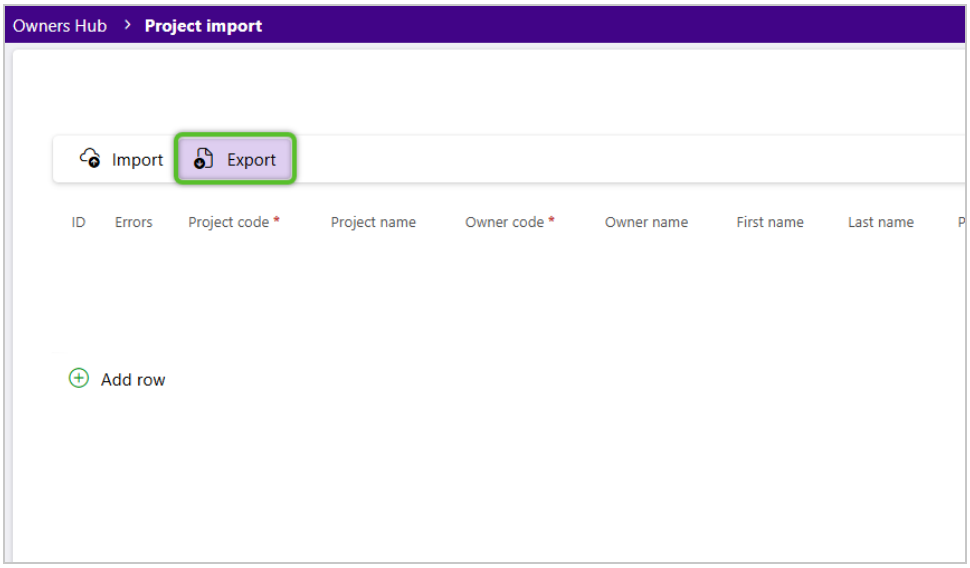
1. Click **Owners** in the left navigation menu, then select either **Owners** or **Projects**.

2. Click **Import Projects** in the top toolbar.



3. In the **Projects Import** screen, click **Export** at the top.

The import projects template file will be downloaded to the user's default download location.



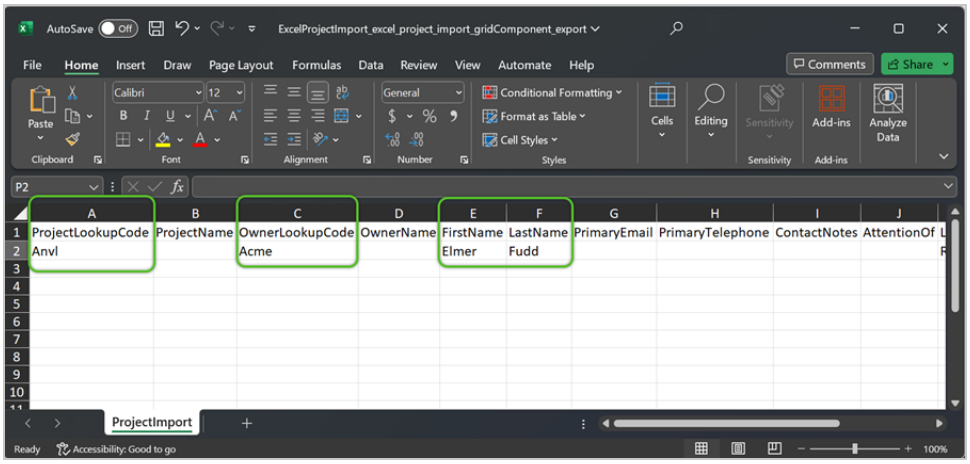
4. Locate the file named '**ExcelProjectImport_excel_project_import_gridComponent_export**' and double click on it to open it.



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.

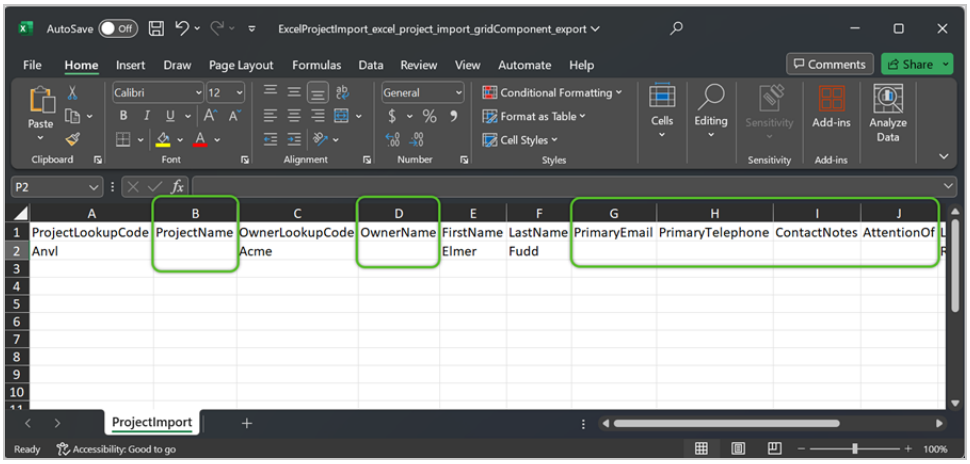
5. In required columns **A**, **C**, **E**, and **F**, enter the **ProjectLookupCode**, **OwnerLookupCode**, **FirstName**, and **LastName**, respectively.



Important

When adding data to the project 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 fields in Footprint. An error will occur when importing if values in the file do not exactly match those in Footprint.

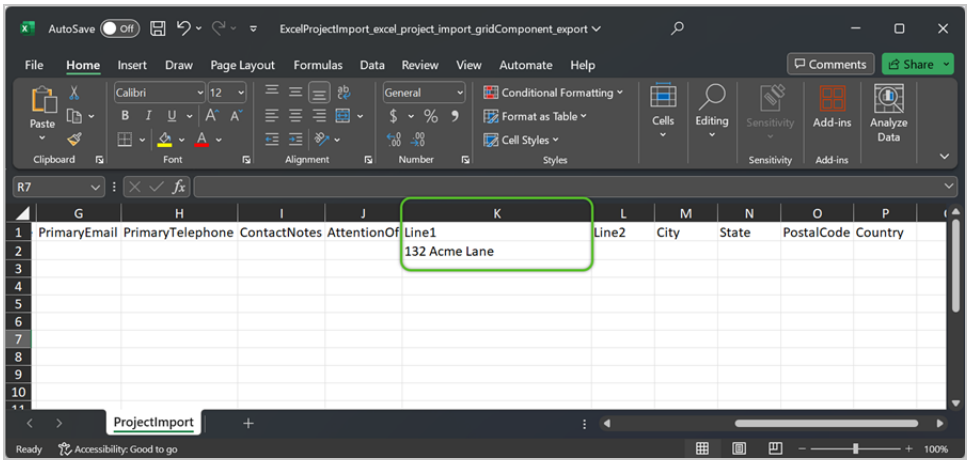
6. When possible, enter the optional details in columns **B**, **D**, **G**, **H**, **I**, and **J**, keeping mind that the Import process is not intended for future data updates.



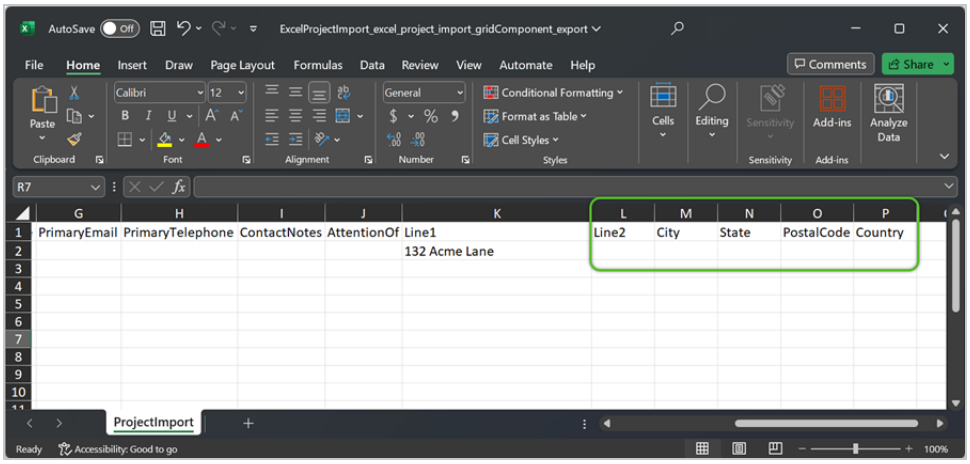
Important

- The **OwnerName** is required only when importing a new Project to an existing **OwnerName**. All capitalization, spelling, and spacing--including spaces at the beginning or end that may not be easily seen, must match exactly with the fields in Footprint. An error will occur when importing if values in the file do not exactly match those in Footprint.
- The **FirstName** and **LastName** can be left blank unless adding a Contact, and which also requires an address **Line1**.

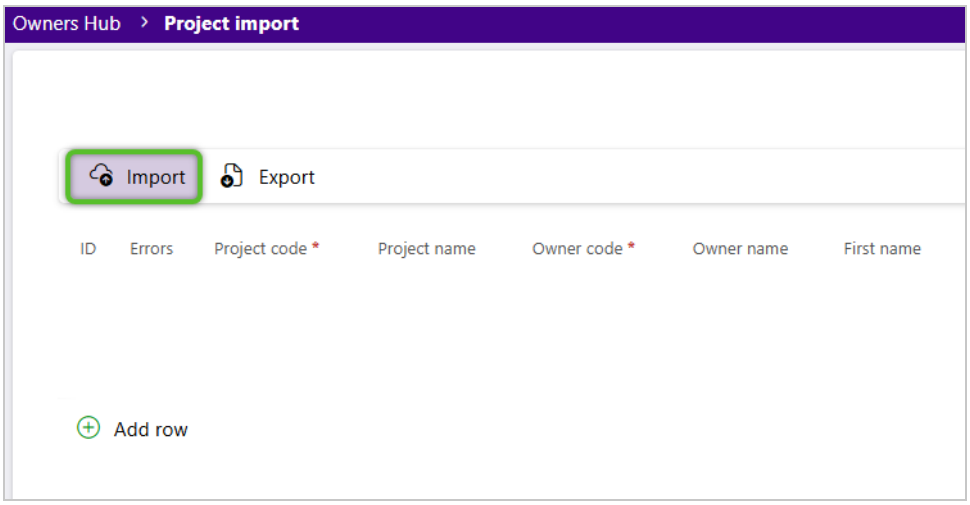
7. **Column K** is optional unless a Contact **FirstName** and **LastName** have been added. If so, enter the required address **Line1**.



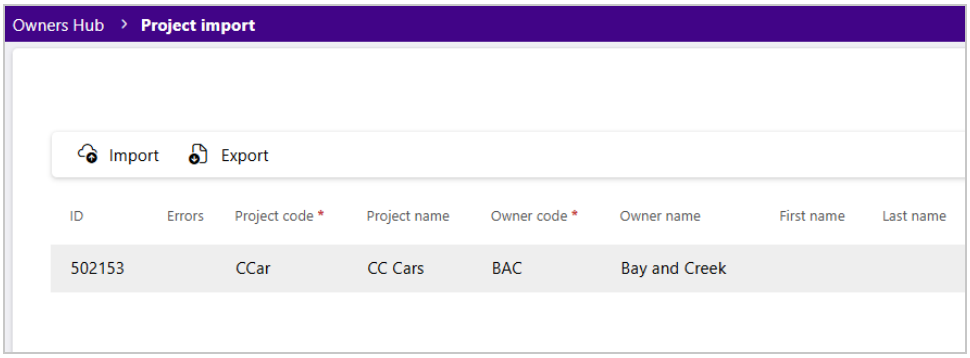
8. When possible, enter details in the remaining optional columns, keeping mind that the Import process is not intended for future data updates.



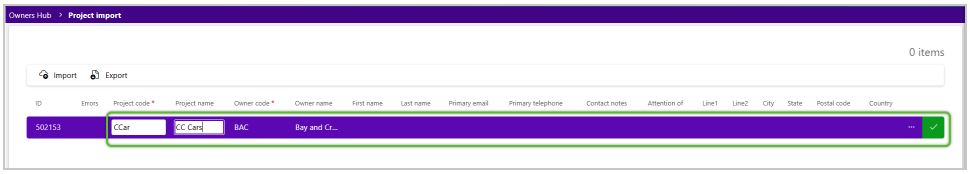
9. Save and close the spreadsheet, then click **Import** in the toolbar to select the file for upload.



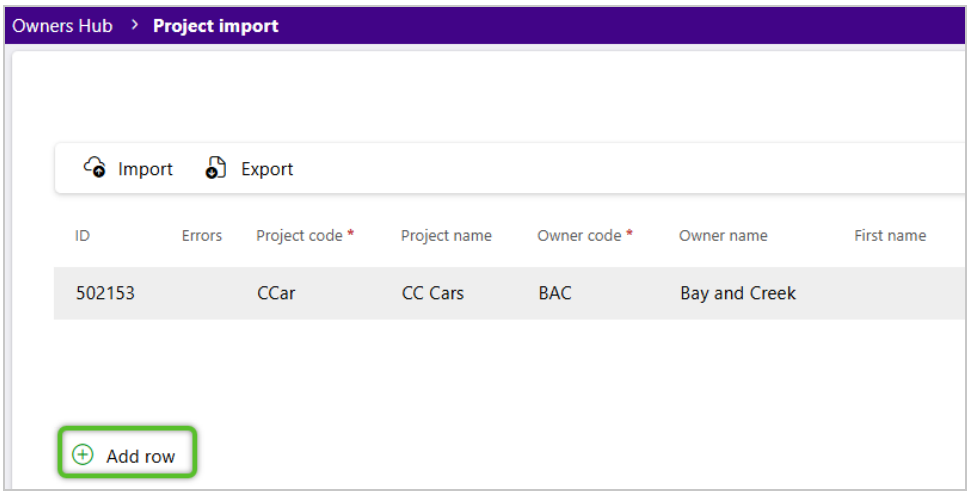
The Project details from the spreadsheet will display for review and edits.



10. Click into a row to make changes to a Project, then click the green check mark on the right to update the project details.



11. To add rows, click the green **+ Add Row** option at the bottom of the Projects list.



The newly imported projects(s) will now display alongside other Projects in the Projects Hub.

Manage Owners

Once an **Owner** has been created, there are further details that can be specified and managed. From the Owner record, users can **Create Inventory**, **Projects**, and **Materials**, as well as add shipping addresses, assign containers, associate carriers, add contacts, and add owner-specific instructions.

Step 1. Open the Owners Hub

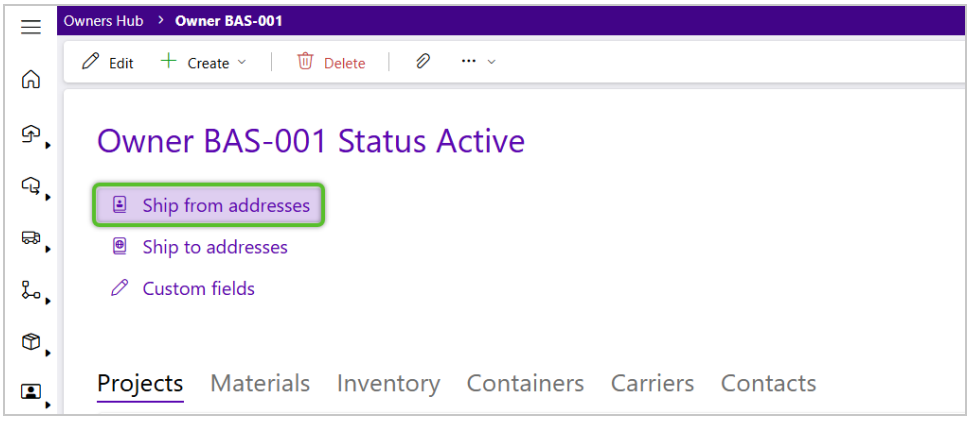
1. Click **Owners** in the left navigation menu, then select **Owners**.

The **Owners Hub** will display.

Step 2. Add Shipping Addresses

Add Ship From Addresses

1. Click the **Ship From Addresses** option on the Owner record.



2. In the Addresses window, click the green **+ Add Row** option.

3. Locate or enter the new address details, then click the green check mark at the end of the address row.

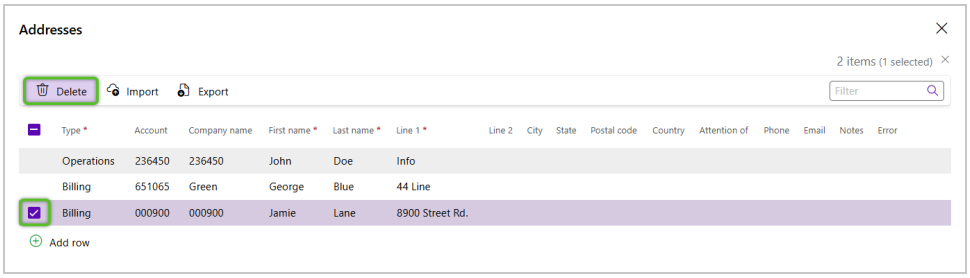


The address will now be associated as a **Ship From Address** for the Owner.

4. Repeat the process to add as many Ship From Addresses as needed.

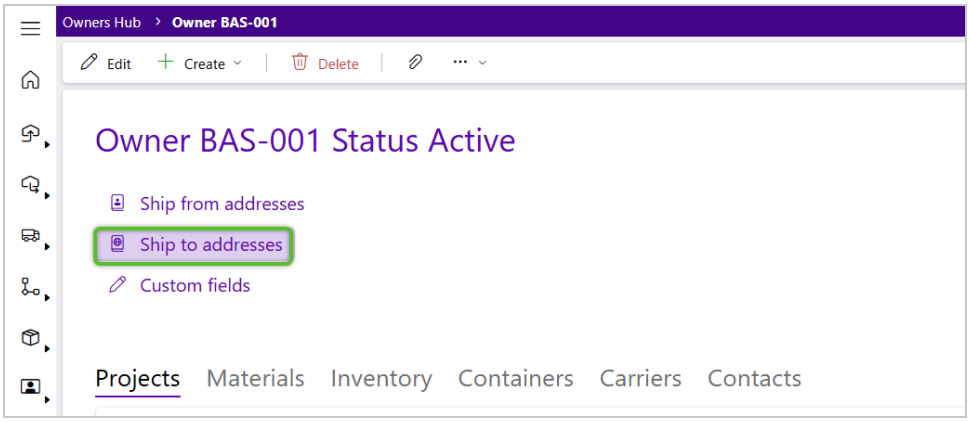


To remove an address, check the box for the Ship From Address row, then click the **Delete** option.



Add Ship To Addresses

1. Click the **Ship To Addresses** option on the Owner record.



2. In the Addresses window, click the green **+ Add Row** option.

3. Locate or enter the new address details, then click the green check mark at the end of the address row.

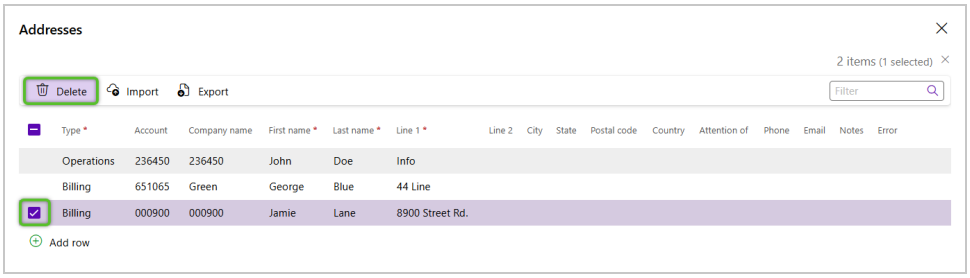


The address will now be associated as a **Ship To Address** for the Owner.

4. Repeat the process to add as many Ship To Addresses as needed.

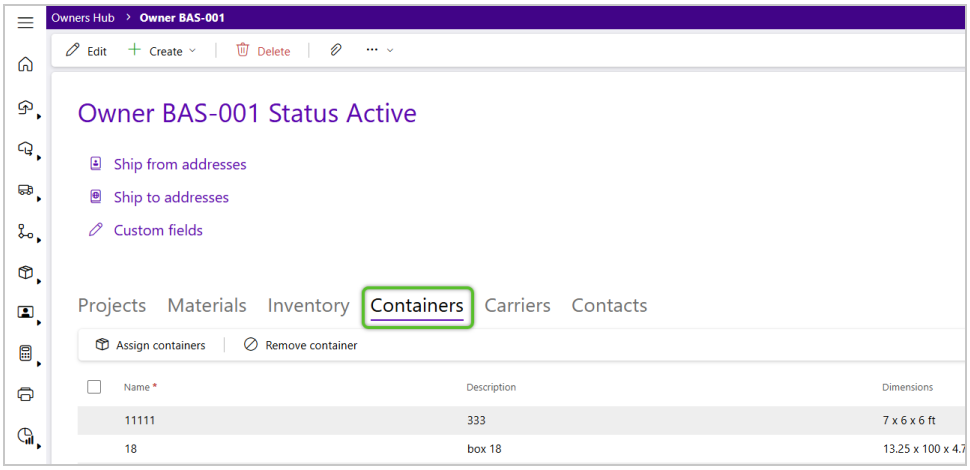


To remove an address, check the box for the Ship To Address row, then click the **Delete** option.

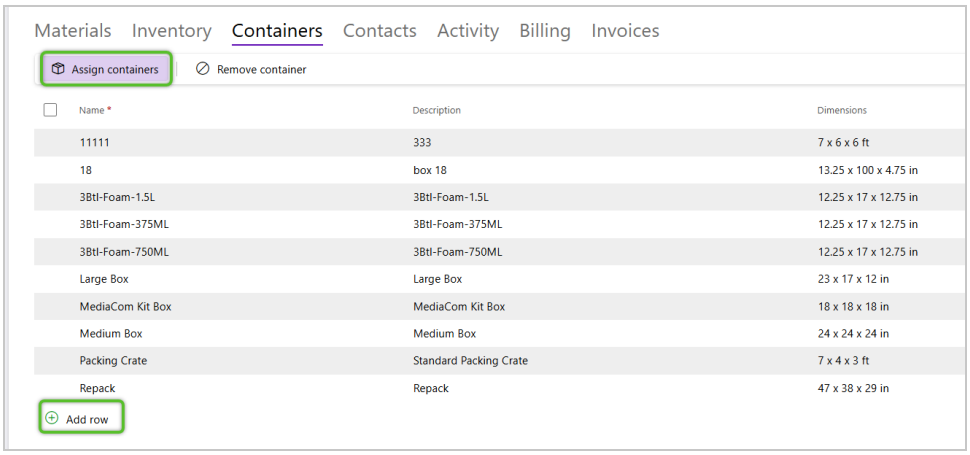


Step 3. Assign Containers

1. Click the **Containers** tab.



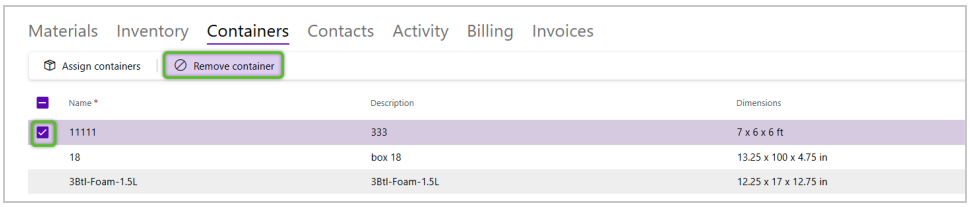
2. In the **Container** tab, click the **Assign Containers** button to open and select a Container, or click the green **+ Add Row** option to create a new one.



The container will now appear on the list of containers assigned.

3. Repeat the process to assign as many Containers as needed.

To remove a Container, check the box for the Container row, then click the **Remove Container** option.

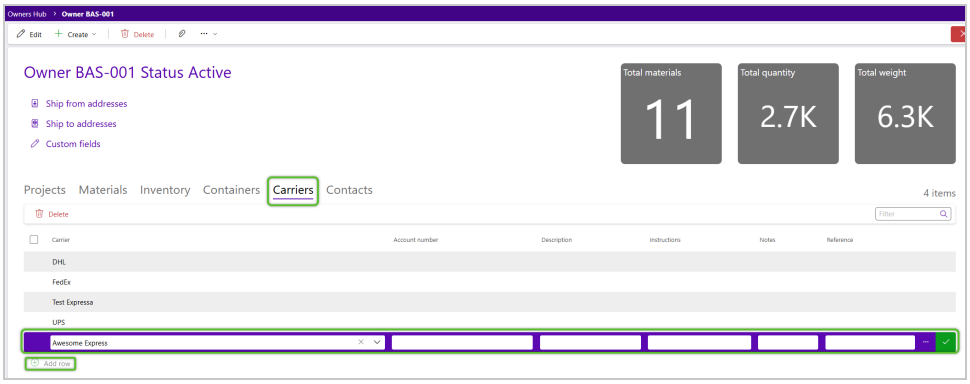


Step 4. Associate Carriers

Associating a Carrier to an Owner will help expedite the Order creation process.

1. Click the **Carriers** tab, then click the green **+ Add Row** option

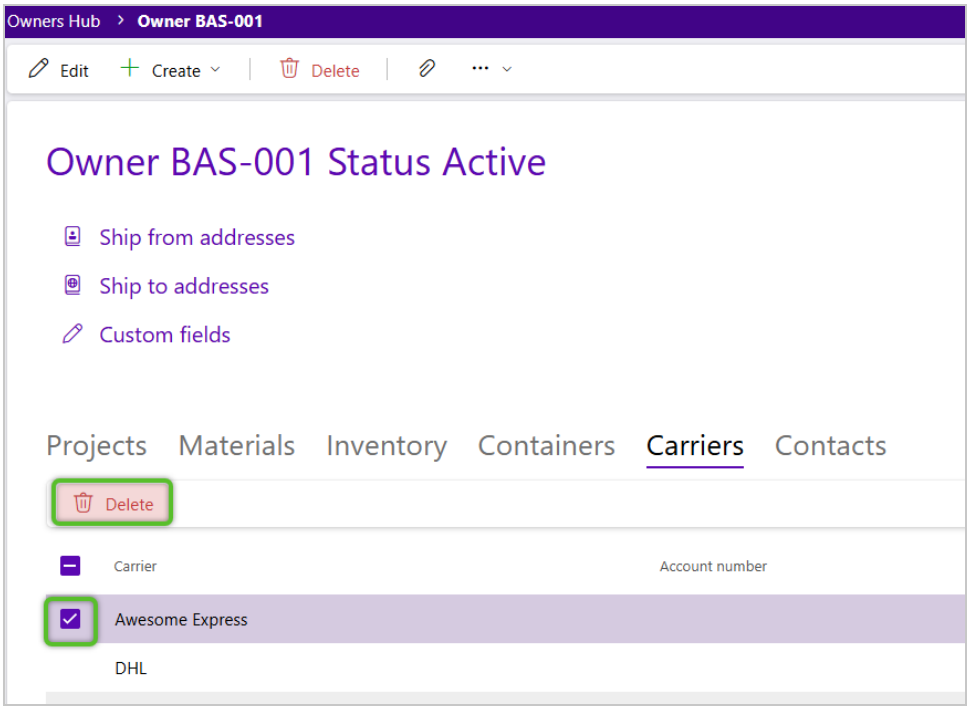
2. Locate the desired **Carrier**, enter the optional details, then click the green check mark at the end of the row.



The associated carrier will now be displayed in the Carriers list for the Owner.

3. Repeat the process to add as many Carriers as needed.

To remove a Carrier, check the box for the Carrier row, then click the **Delete** option.

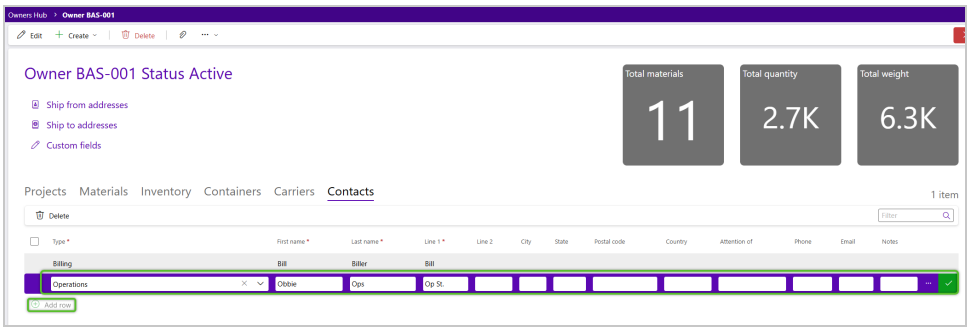


Step 5. Add Contacts

The **Contacts** tab allows you to set up contacts associated with the Owner.

1. Click the **Contacts** tab, then click the green **+ Add Row** option.

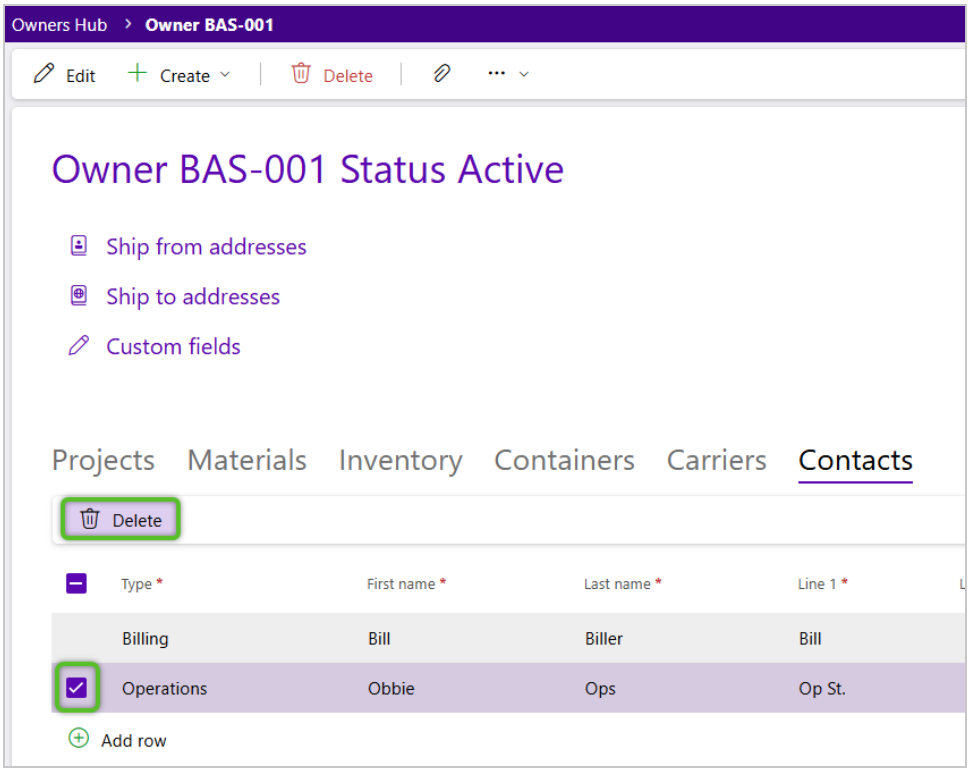
2. Enter the desired **Contact** and it's required details, enter any of the optional details, then click the green check mark at the end of the row.



The associated contact will now be displayed in the Contacts list for the Owner.

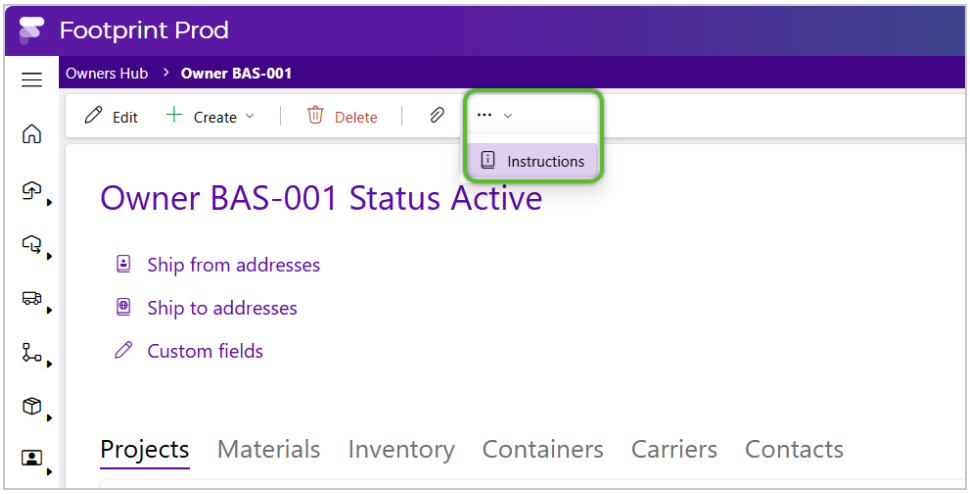
3. Repeat the process to add as many Contacts as needed.

To remove a Contact, check the box for the Contact row, then click the **Delete** option.



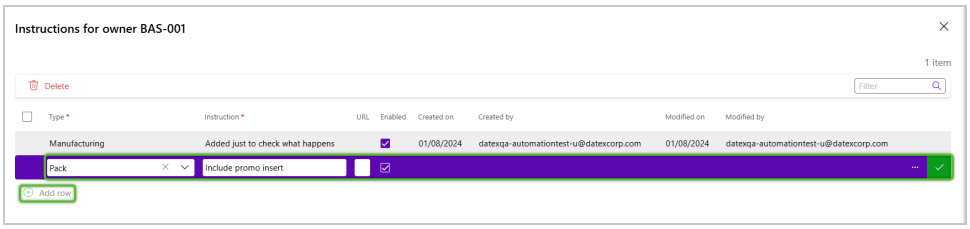
Step 6. Add Instructions

1. Under the additional options of the Owner toolbar select **Instructions**.



2. Select an **Instruction Type**.

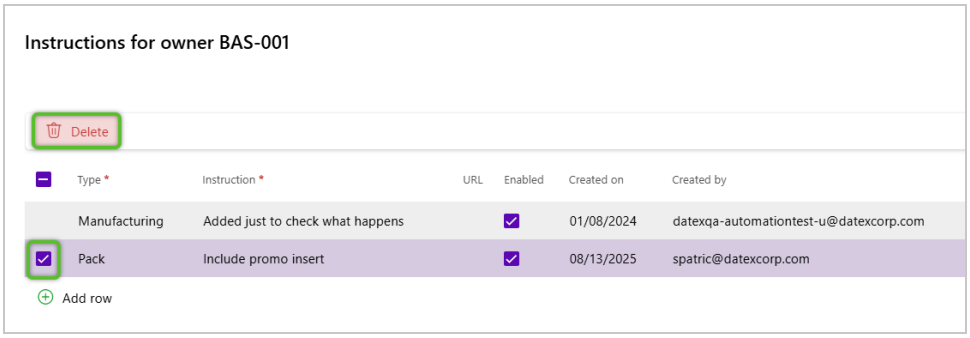
3. Select an Instruction **Type** and enter the **Instructions** and any optional details, then click the green check mark.



The Owner Instruction will now appear in the list on the **Instructions** tab.

4. Repeat the process to add as many Instructions as needed.

To remove an Owner Instruction, check the box for the Instruction row, then click the **Delete** option.



Manage Carriers

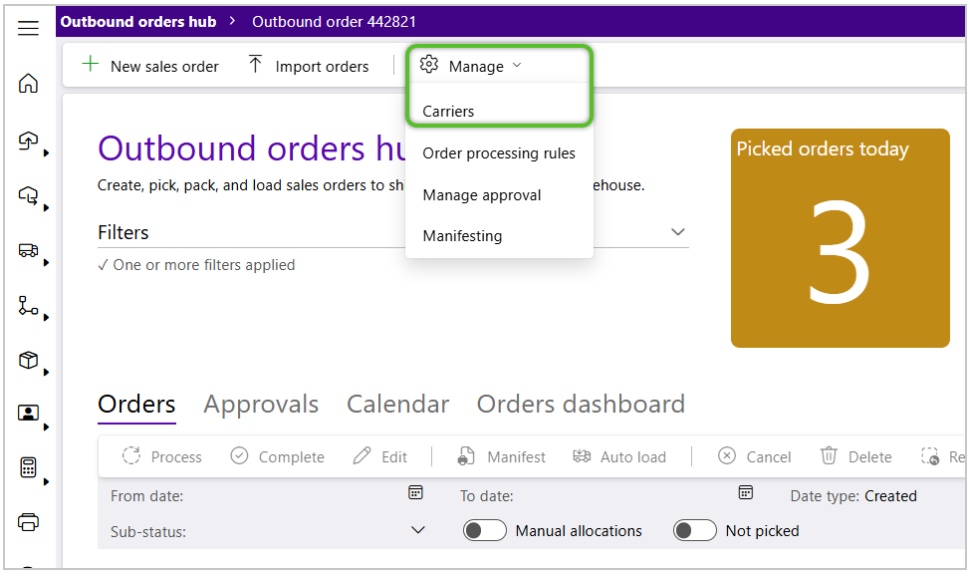
Sections

- View Carriers
- Create a Carrier
- Edit a Carrier
- Delete a Carrier

Carriers are the delivery companies used for Shipments. Each Carrier can be configured with **Service Types** to specify the method(s) of shipping offered by the Carrier.

View Carriers

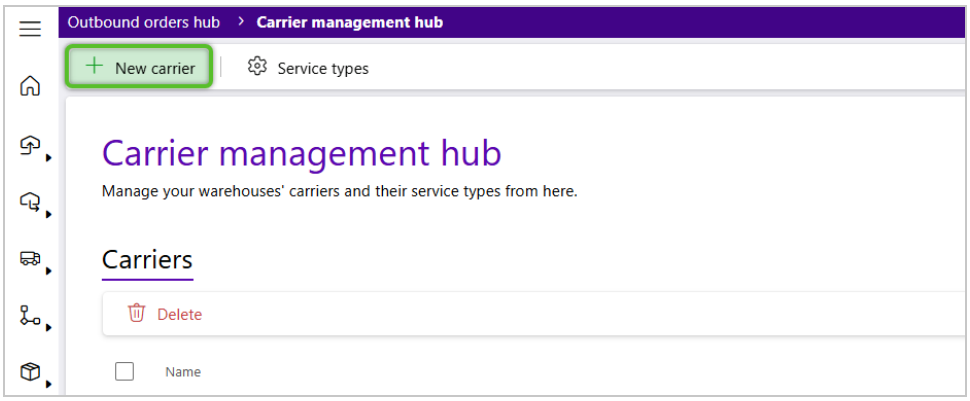
1. From the **Outbound Hub**, click **Manage Carriers** in the top toolbar.



The **Carriers** will display.

Create a Carrier

1. Click **+ New carrier** in the top toolbar.

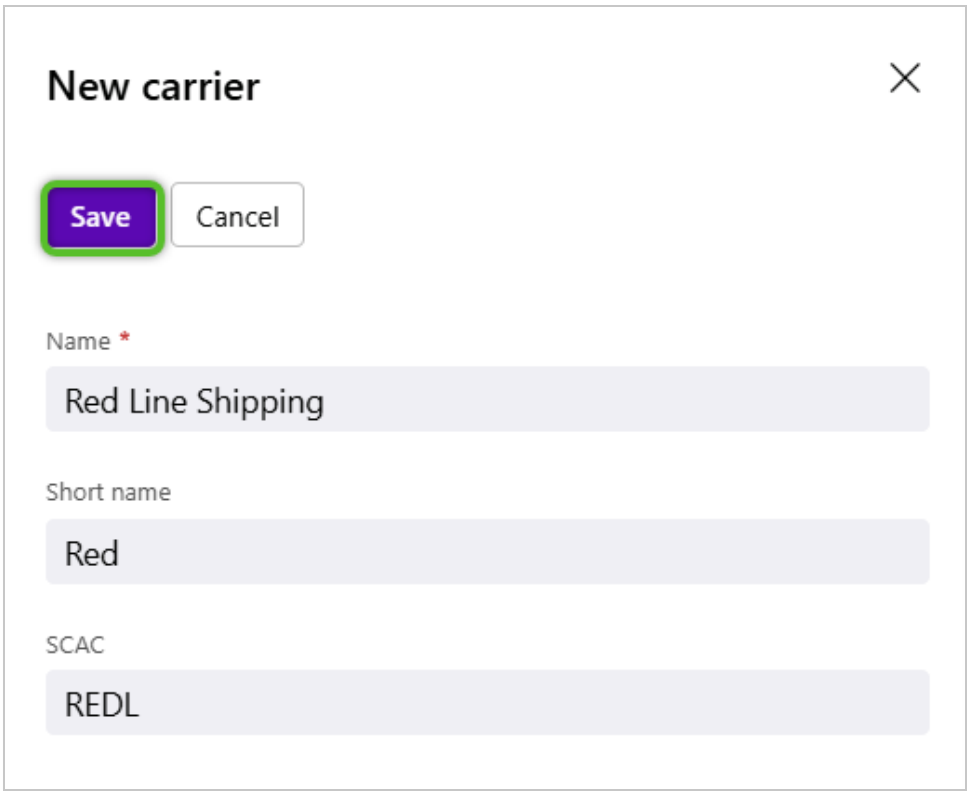


2. In the **Create Carrier** window, enter the required carrier **Name**.

3. Enter a **Short Name** and/or **SCAC**, if desired.

4. Click the **Save** button in the top left of the **NewCarrier** window to save the new Carrier for use.

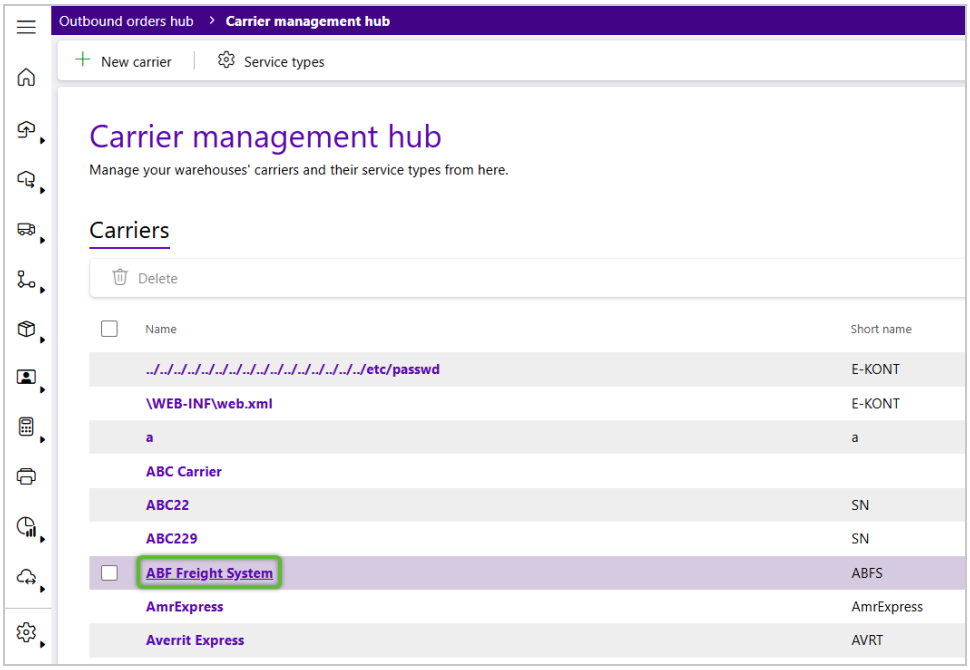
The new Carrier will be available for immediate use.



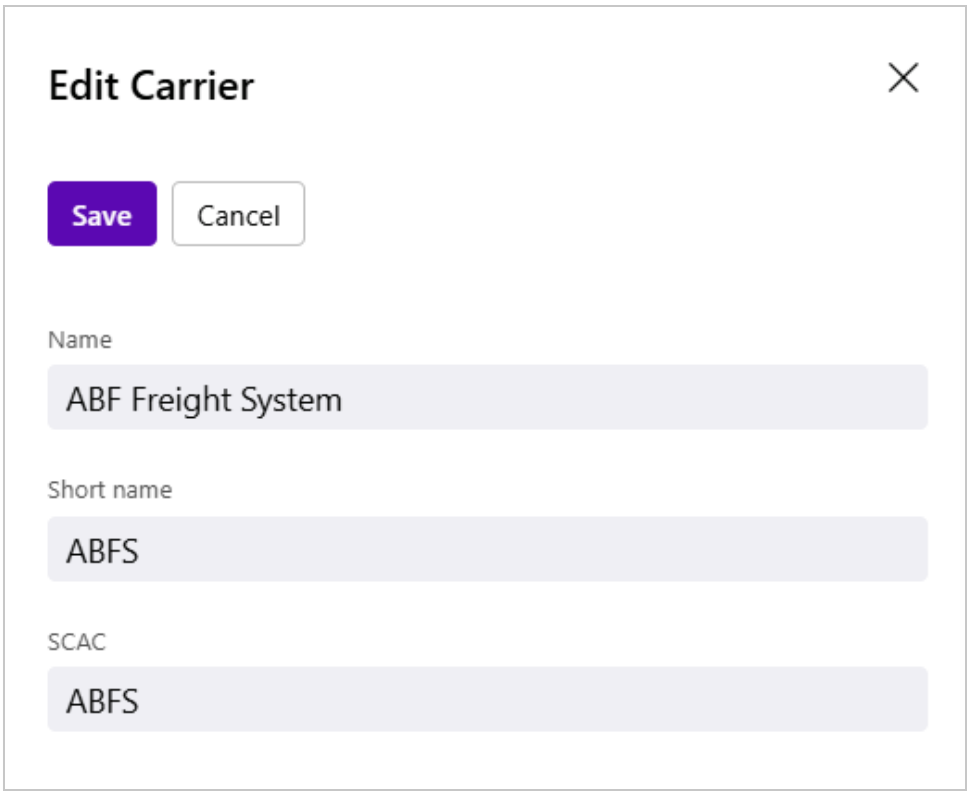
Edit a Carrier

1. Locate the Carrier to be updated, then click the **Carrier** name.

The Carrier will open for editing.

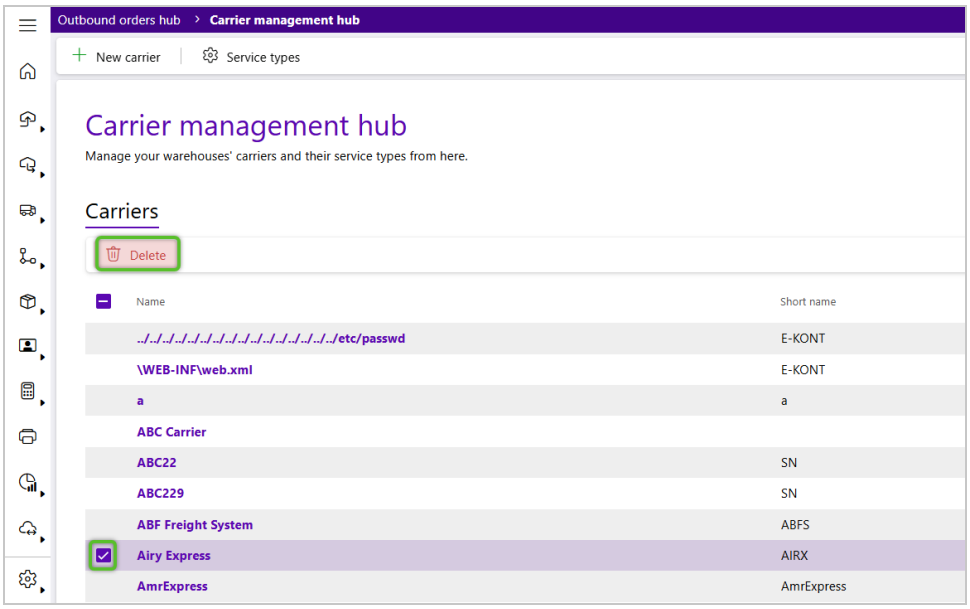


2. In the **Edit Carrier** window, make any necessary changes, then click the **Save** button in the top left to update the Carrier details.



Delete a Carrier

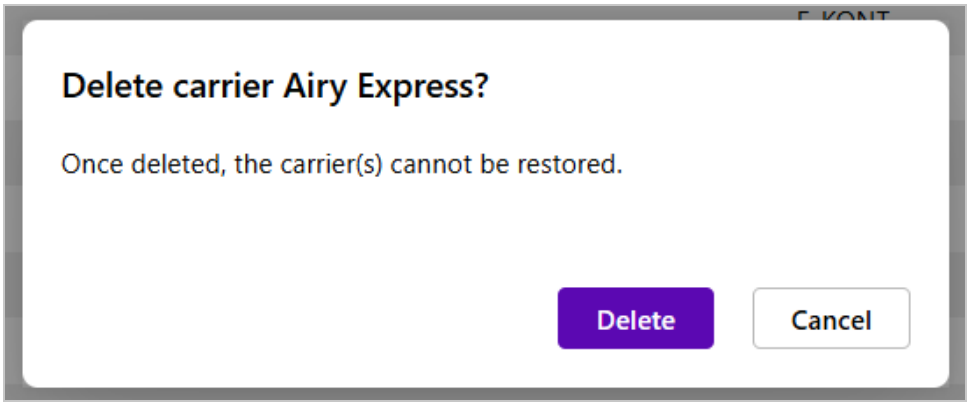
1. Locate the Carrier to be deleted, check the box to the left of the **Carrier** name, then click **Delete** in the toolbar.



Note

If a user attempts to delete a Carrier already in use, a message will appear indicating the Carrier cannot be deleted.

2. Review the details of the Carrier to be deleted, then click the **Delete** button.



3. Click the **OK** button to close the confirmation window.

The deleted Carrier will no longer be available for use.

Manage Carrier Service Types

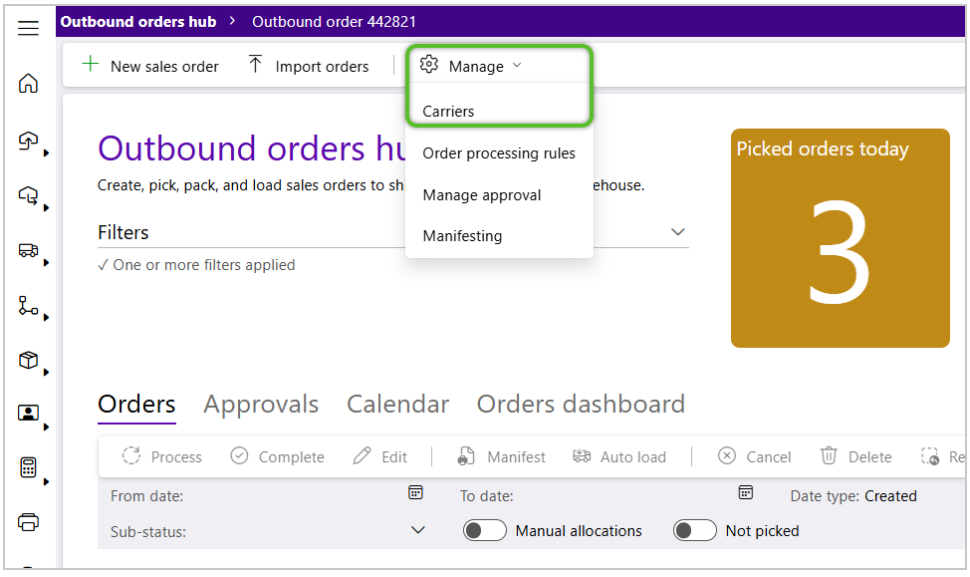
Sections

- View Carrier Service Types
- Create a Carrier Service Type
- Edit a Carrier Service Type
- Delete a Carrier Service Type

Carrier Service Types are the various methods by which a delivery company, a **Carrier**, may use for Shipments.

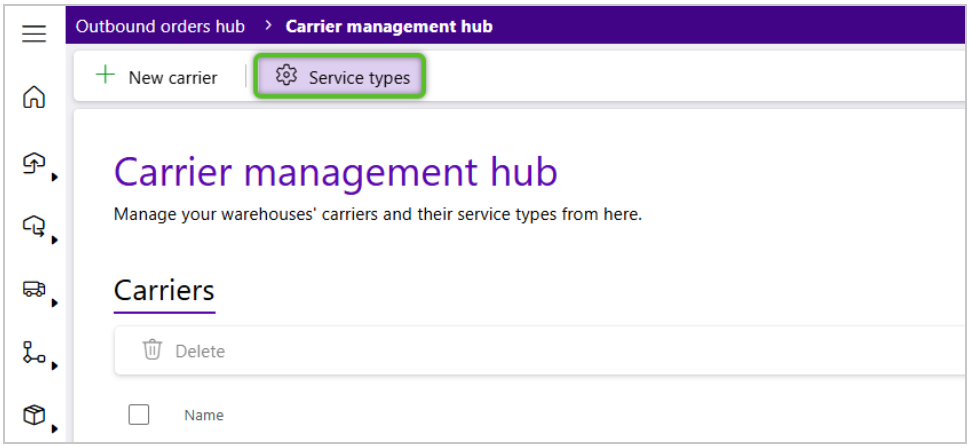
View Carrier Service Types

1. From the **Outbound Hub**, click **Manage Carriers** in the top toolbar.



The **Carriers** will display.

2. Click **Service Types** in the top toolbar.



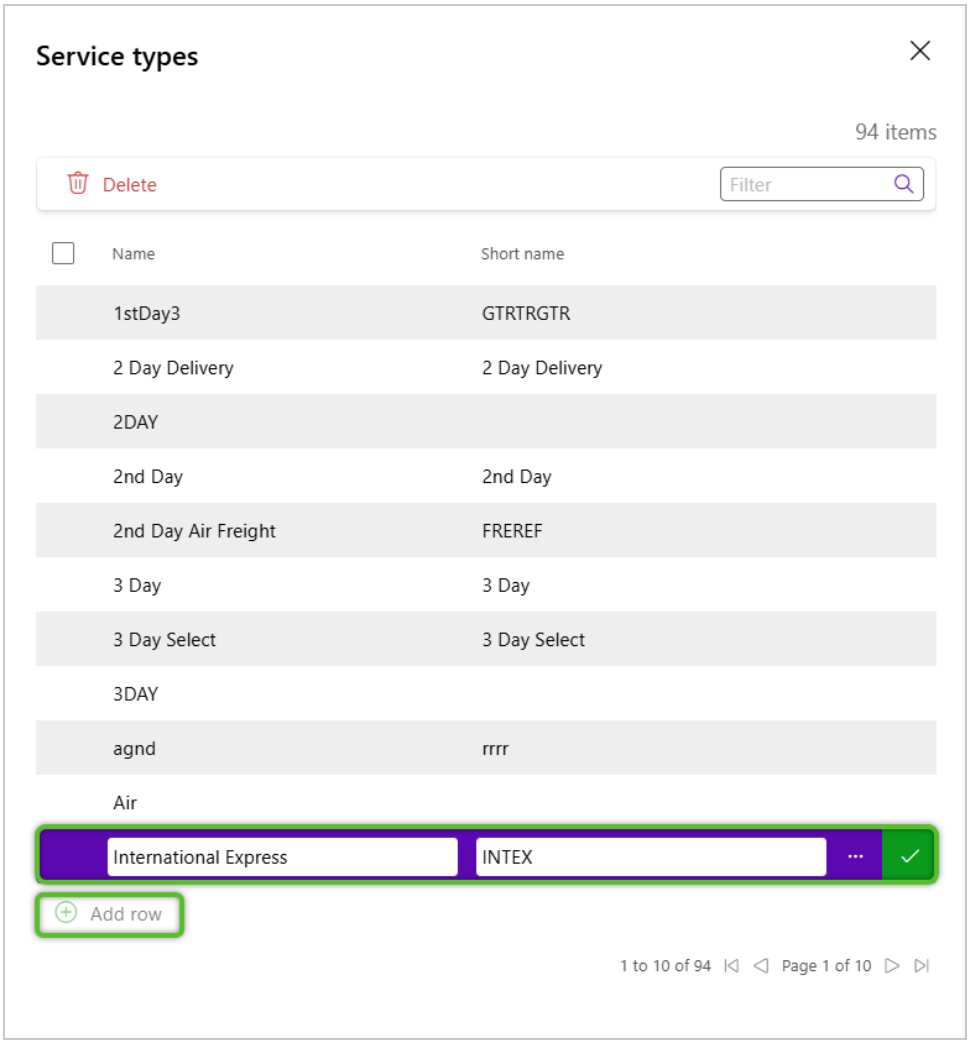
The **Carrier Service Types** will display.

Create a Carrier Service Type

1. In the **Service Types** window, click **+ Add Row** at the bottom.

2. Enter the **Name** and **Short Name** for the new Service Type, then click the green check mark in the right column to save it.

The new Carrier Service Type will be available for immediate use.

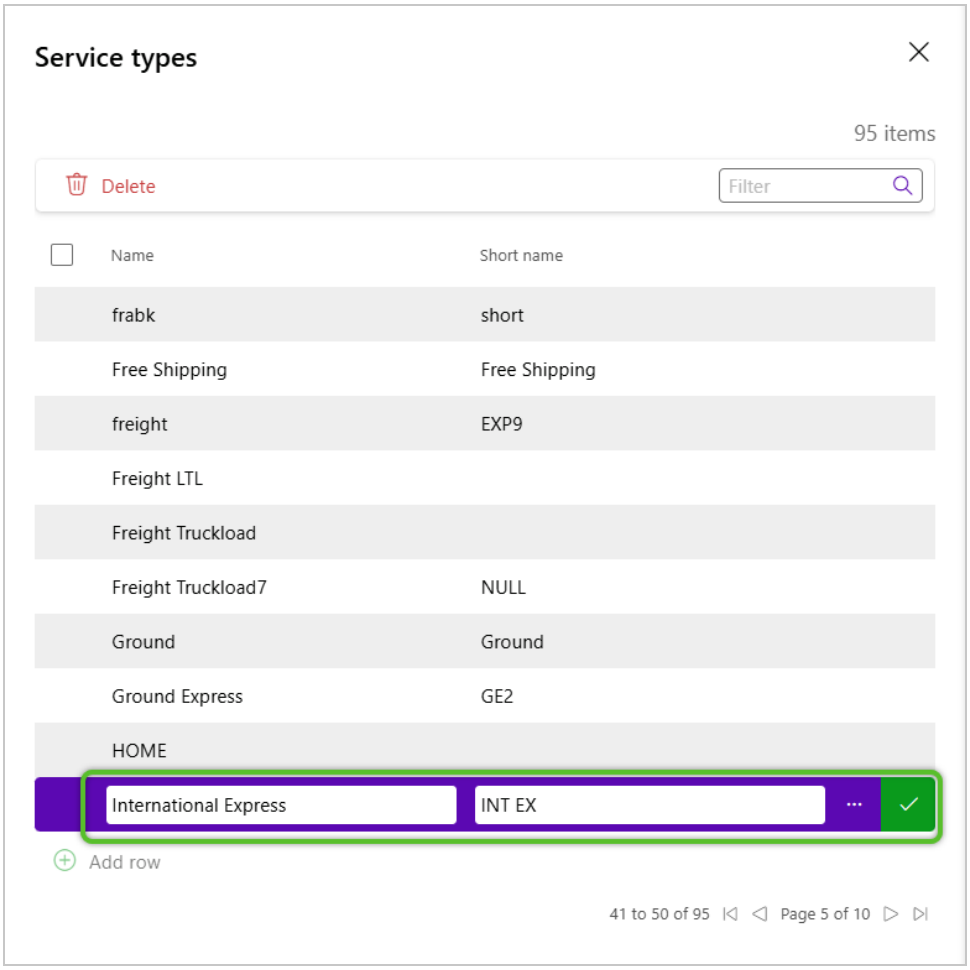


Edit a Carrier Service Type

1. In the **Service Types** window, locate the Service Type to be updated, then click into it's row.

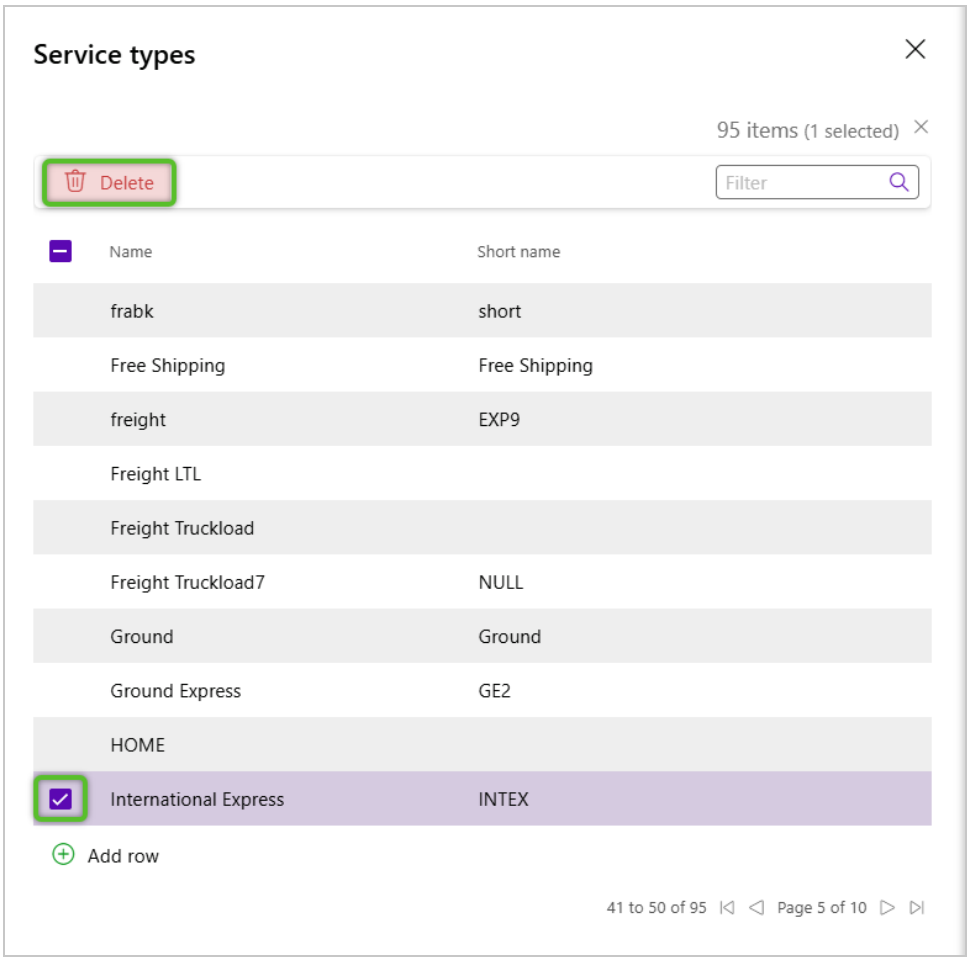
The Carrier Service Type row will be enabled for editing.

2. Make any necessary changes to the Service Type, then click the green check mark in the right column to save the updates.



Delete a Carrier Service Type

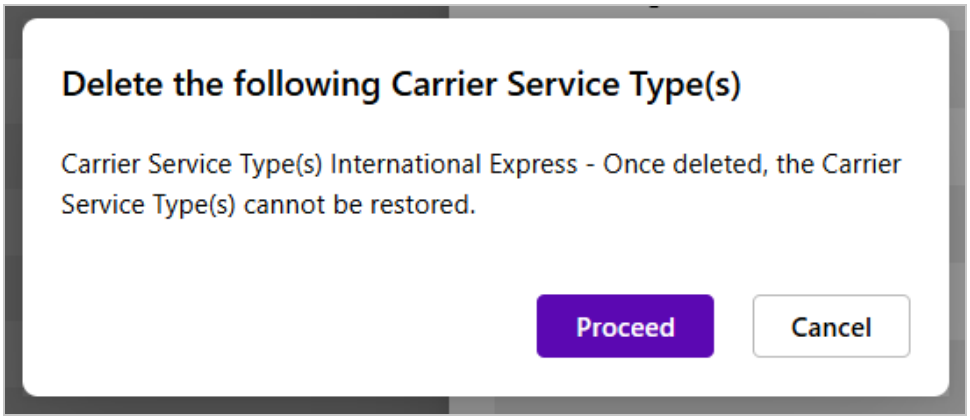
1. Locate the Carrier Service Type to be deleted, check the box to the left of it, then click **Delete** in the toolbar.



Note

If a user attempts to delete a Carrier Service Type already in use, a message will appear indicating it cannot be deleted.

2. Review the details of the Carrier Service Type to be deleted, then click the **Proceed** button.



3. Click the **OK** button to close the confirmation window.

The deleted Carrier Service Type will no longer be available for use.

Materials Guide

Sections

- Overview
- Materials Hub
- Material Record

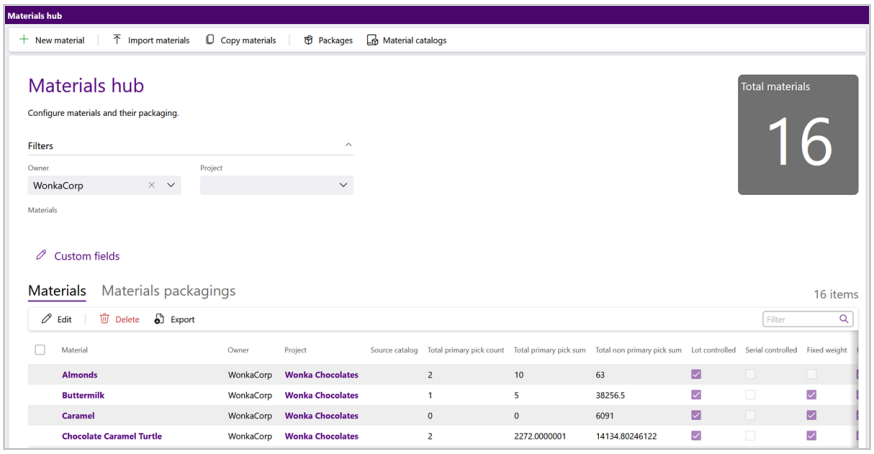
Materials are the most basic part of your Warehouse, and the reason you have a Warehouse in the first place - Materials are your **Inventory**.

Overview

Everything you store in your Warehouse, every item you Ship out or Receive, each piece of inventory is represented by a Material. Every item you work with requires a Material in the system to represent it, and all the information about those items can be managed in the **Materials Hub**. Each Material in the Warehouse belongs to an Owner, and is classified within one of that Owner's Projects. Materials are configured as part of a **Material Group**. Materials are assigned to License Plates and are stored in a Warehouse's Locations. If using the same Materials between different Owners and Projects, you may want to create a **Material Catalog** rather than creating the same Materials over and over again for each Project.

Materials Hub

The **Materials Hub** allows users to create and manage all Materials, Packagings and Catalogs in Footprint. Materials and Packagings are listed in their respective tabs, in ascending alpha-numeric order. In the top, right corner is a grey square tile displaying the **Total Materials**.



Icons along the top of the Materials Hub allows users to **Create a New Material**, **Manage Packagings**, **Copy Materials**, **Import Materials**, and **Create Material Catalogs**. For the complete set of options available for Material setup, please visit our **Setup a Material article**.

Filters allow users to refine the listed Materials by an **Owner** or a **Project**. Users can filter further using the **Material** field. Users can also search by entering a Material's Code, UPC, or Description in the Search field in the top right corner of the Materials List toolbar. Any Custom Fields for Materials can be reviewed by clicking the **Custom Fields** option below the Filters.

Materials Hub Tabs

The **Materials** and **Material Packagings**tabs each display their own set of information and options for managing that information. Expand the sections below for more details about each tab.

Materials

The **Materials** tab lists all Materials matching the filter and search criteria, in ascending alpha-numeric order. Basic information about the Materials is displayed. Selecting a **Material Record** will open it so the user can review and manage its details.

Materials Tab Details

Material:	The name of the Material.
Owner:	The Owner associated with this Material.
Project:	The Project under which this Material is classified.

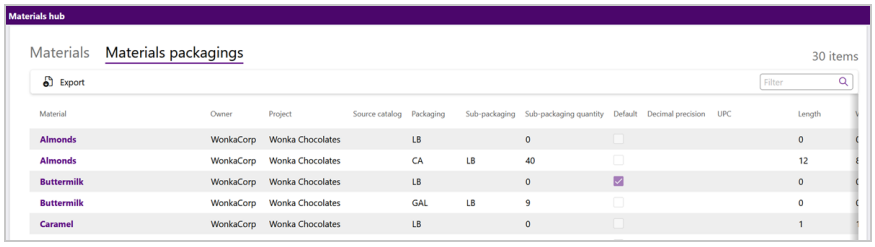
Source Catalog:	The Source Catalog from which the Material is being pulled.
Total Primary Pick Count:	The Total Primary Pick Count for the Material.
Total Primary Pick Sum:	The Total Primary Pick Sum for the Material.
Total Non-Primary Pick Sum:	The Total Non-Primary Pick Sum for the Material.
Lot Controlled:	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.
Description:	A short description of what the Material is.

Materials Tab Toolbar

Edit:	Opens a window to change limited details for the selected Material: Material Group, Allocation Strategy, Shelf Life, and Status.
Delete:	Allows users to delete the selected Material(s) when they are no longer needed in the Warehouse(s).
Export:	Allows users to export the selected Material(s) details.

Material Packagings

The **Material Packagings** tab lists all Material Packagings matching the filter and search criteria, in ascending alpha-numeric order. In the Material Packagings toolbar, there is an option to **Export** the selected Packagings.



Material Packagings Tab Details

Material:	The name of the Material.
Owner:	The Owner associated with this Material.
Project:	The Project under which this Material is classified.
Source Catalog:	The Source Catalog from which the Material is being pulled.
Packaging:	The Packaging Type of the Material.
Sub-Packaging:	The Sub-Packaging Type of the Material.
Sub-Packaging Quantity:	The quantity of the Material with that Sub-Packaging.
Default:	When enabled, this Package level will be the default level for the Material. May be tied to Billing.
Decimal Precision:	Allows the Package to be split into fractions. The **No Decimals** setting 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.
UPC:	Universal Product Code, unique to each level of Packaging.
Length:	Length of Material. Only required when the Fixed Dimensions toggle is in use.
Width:	Width of Material. Only required when the Fixed Dimensions toggle is in use.
Height:	Height of Material. Only required when the Fixed Dimensions toggle is in use.
L x W x H Measure:	Unit of measurement for distance. Options include meter, centimeter, foot, and inch. Only required when the Fixed Dimensions toggle is in use.
Weight:	Weight of the items in this Package. Only required when the Fixed Weight toggle is in use.
Shipping Weight:	Weight of the items in this Package, combined with the weight of the Package itself (Tare Weight). Only required when the Fixed Weight toggle is in use.
Weight Measure:	Unit of measurement for weight. Options include kilogram, gram, pound, ounce, ton, troy ounce, and metric ton. Only required when the Fixed Weight toggle is in use.
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 Fixed Volume toggle is in use.
Shipping	Volume of the Package considering any other factors that may

Volume:	impact the Package before Shipping. Only required when the Fixed Volume toggle is in use.
Volume Measure:	Unit of measurement for volume. Options include cubic meter, cubic centimeter, cubic foot, and cubic inch. Only required when the Fixed Volume toggle is in use.
Pallet High:	The number of this Material Packaging that can be stacked atop each other on a Pallet.
Pallet Tie:	The number of this Material Packaging to be placed on the first level of the Pallet before you begin stacking atop them.
Shippable Container:	When enabled, this Packaging can be used as an actual Shipping 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.
Stack Group:	A field for entering a group name for this item when Stacked. Used for Cartonization process.

Material Record

The Material record can be opened for further review and management by clicking the Material **Name**. The Material's basic information will be displayed, including the Name, Status, and Description. The default view is Inventory by Materials. Users can also view Material Inventory by Locations, by License Plates, or by Lots. In the top right corner are three tiles indicating the **Total Available**, **Total Base Available**, and **Total Gross Weight** for the Material.

Icons along the top of the Material record allows users to **Edit Material Details**, **Create Inventory**, Delete the Material, **Print Material Reports or Labels**, **Manage Attachments**, and **Manage Comments**. **Assigned Containers**, **Material Substitutions**, and **Material Aliases** can be opened for review and management. For more details on all setup options, please visit our comprehensive **Setup a Material** tutorial.

Material Record Details

In addition to the Material's Name, Status, and Description displayed here, 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. There are additional details that can only be managed when viewing a **Material's Edit window**.

Basic Information

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 Owner associated with this Material.
Project:	The Project under which this Material is classified.
Packaging:	The Packaging for the Material being created.
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 Group associated with the Material. This will bring in Temperature Category Rules and User Defined Fields, if available. See the Material Groups section for more information.

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

Configuration

Allocation Strategy:	This controls how Footprint decides which active **Allocation Strategy** the Material will use. (check that link to see if there are details to be added).

Out-of-the-box options include Allocation Strategies with the following configurations:

- **FIFO** (First In First Out) - The Inventory that entered the Warehouse first are assigned to Orders before newer Materials.
- **FEFO** (First Expired First Out) - Inventory whose Expiration Dates are nearest are assigned to Orders.
- **FMFO** (First Manufactured First Out) - The Inventory that was originally manufactured first are assigned to Orders before newer Materials.
- **LEFO** (Last Expired First Out) - The Inventory whose Expiration Dates are furthest away are assigned to Orders.
- **Largest Package First** - Prioritizes Packaging Types with larger physical dimensions over those with smaller, so that larger items are assigned to Orders first.
- **Requested Package First** - Prioritizes the Packaging Type specified on the Order Line over any other Packaging Types, so that the requested Packaging is assigned to Orders whenever available.
- **Requested Package Only** - Only allows the Packaging Type specified on the Order Line to be assigned to the Order.
- **By Lot** - The FIFO / FEFO / FMFO / LEFO rules consider the create / expiration / manufacture date of the Inventory's assigned Lot.
- **By LP** - Available as a FIFIO option, prioritizing the oldest License Plates in the Warehouse for Orders over newer LPs.
- **Lot with LP** - The general FIFO / FEFO / FMFO / LEFO rules consider the create / expiration / manufacture date of the Inventory's assigned Lot, and then prioritize the oldest License Plates in the Warehouse from that Lot as the ones to assign to the Order.

Tracking: The Material's Tracking will depend on how you will be keeping track of the Material.

When keeping track of individual lots is important, select **Track Lots**. For Lot Tracked Materials that require individual product Serial Numbers, or tracking of unique information through Custom Fields, select **Track Lots** and **Track Serials**.

If the Material is not Lot Tracked, but tracking of Serial Numbers / Custom Field information is still needed, select only **Track Serials**. All Material of this type will be assigned a Generic Lot, or GLot, as will any Material not being tracked at all.

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

Measurements

Fixed Weight:	Indicates whether or not the Material Weight is always fixed.
Weight:	Weight of the items in this Package. Only required when the Fixed Weight toggle is in use.
Shipping Weight:	Weight of the items in this Package, combined with the weight of the Package itself (Tare Weight). Only required when the Fixed Weight toggle is in use.
Weight Measure:	Unit of measurement for weight. Options include kilogram, gram, pound, ounce, ton, troy ounce, and metric ton. Only required when the Fixed Weight toggle is in use.
Fixed Volume:	Indicates whether or not the Material Volume is always fixed.
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 Fixed Volume toggle is in use.
Shipping Volume:	Volume of the Package considering any other factors that may impact the Package before Shipping. Only required when the Fixed Volume toggle is in use.
Volume Measure:	Unit of measurement for volume. Options include cubic meter, cubic centimeter, cubic foot, and cubic inch. Only required when the Fixed Volume toggle is in use.
Fixed Dimensions:	Indicates whether or not the Material Dimensions are always fixed.
Length:	Length of Material. Only required when the Fixed Dimensions toggle is in use.
Width:	Width of Material. Only required when the Fixed Dimensions toggle is in use.
Height:	Height of Material. Only required when the Fixed Dimensions toggle is in use.
L x W x H Measure:	Unit of measurement for distance. Options include meter, centimeter, foot, and inch. Only required when the Fixed Dimensions toggle is in use.

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

Storage Rules

Pallet High:	The number of this Material that can be stacked atop each other on a Pallet.
Pallet Tie:	The number of this Material to be placed on the first level of the

	Pallet before you begin stacking atop them.
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.
Storage Category Rule:	Designed to specify which Storage Category the Material belongs.

Material Record Options

The Material's Inventory tab is displayed by Material by default. Users can also view the Inventory list by Locations, by License Plates, or by Lots. There are also options to **Assign Containers**, add **Material Substitutions**, and add **Material Aliases**.

Assign Containers

Assigned Containers for the Material can be managed here.



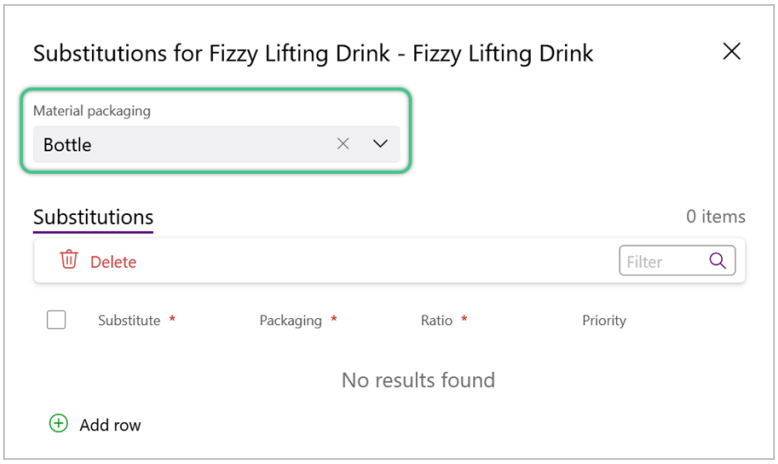
Name:	The container's Name.
Description:	The container's Description.
Length:	The container's Length.
Width:	The container's Width.
Height:	The container's Height.
Dimension UOM:	The container's Dimension Unit of Measure.
Weight Capacity:	The container's Weight Capacity.
Weight UOM:	The container's Weight Unit of Measure.
Catch All:	Indicates whether or not the container can be assigned as a Catch All.

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

Material Substitutions

Material Substitutions allow the set up of additional Materials which could be used to replace the current Material (the Material being edited) when it is not available. These substitute Materials can be leveraged through custom Outbound Order Processing Workflows, to make decisions on Material Substitutions based on Inventory levels.

Before adding Material Substitutes, be sure to first select the **Material Packaging** of the current Material to be replaced by the substitute when needed.



Substitute: The Name of the additional Material to use in place of the current Material. This Material must be from the same Owner / Project.

Packaging: The Packaging Type that should be set to Primarily Pick from this Location.

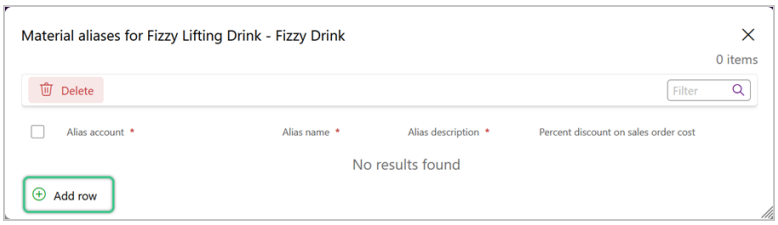
Ratio: The number of Packages of the substitute Material required to replace one Package of the current Material.

Priority: The Priority is used to determine which substitute Material should first be attempted as a replacement. If there is not enough inventory available, the next in line will be used. Priority starts with the lowest number and continues upwards.

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

Material Aliases

Material Aliases allows different customers to see a different Material Name when the Material is displayed in Reports and Workflows. There is also the option to reduce the sales order cost of the Material by a specified percentage for each customer account.



Alias Account:	The Account to which this Alias can apply.
Alias Name:	The Name of the Material Alias.
Alias Description:	The description of the Material Alias.
Percent Discount on Sales Order Cost:	The percent discount ont he sales order cost for the Material Alias for the selected customer Account.

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

Material Record Toolbar

For more details on all setup options, please visit our comprehensive **Setup a Material** tutorial.

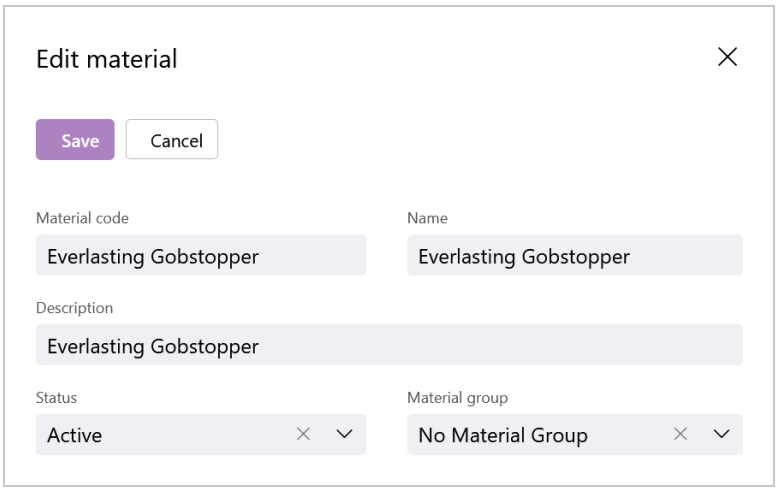
Edit Material Details

There are additional **Configuration** and **Manufacturing** setup options only available in a Material's **Edit Material** window. Details that can be entered during **Material creation** are described in the table above. The additional details that can only be entered when **Editing a Material** are described in the table below.

❑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.

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.

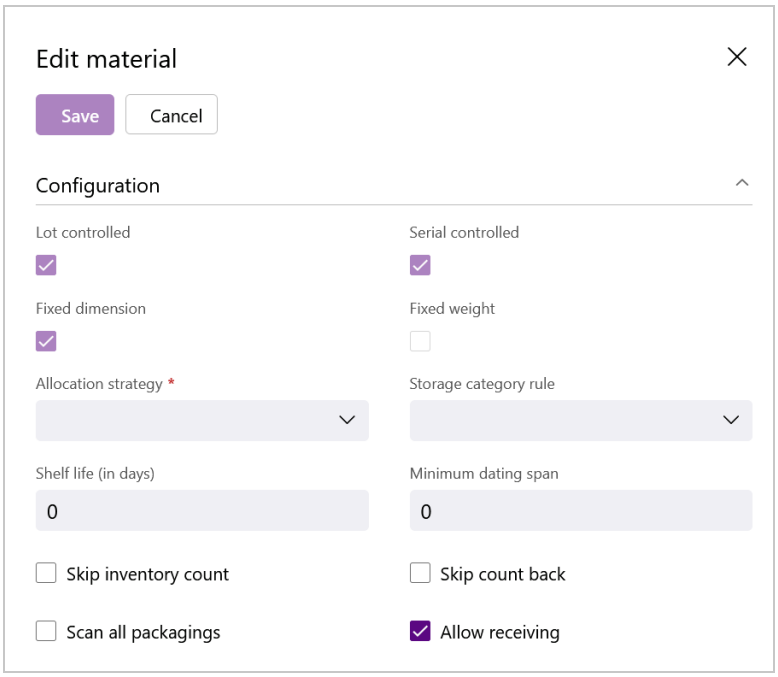
Description: A short description of what the Material is.

Status: There are several pre-defined Statuses to choose from, as well as any custom Statuses added to your system. 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.

Group: The Material Group associated with the Material. This will bring in Storage Category Rules and Custom Fields, if available.

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

Configuration



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 Dimension: Indicates whether or not the Material Dimensions are always fixed.

Fixed Weight: Indicates whether or not the Material Weight is always fixed.

Allocation Strategy: This controls how Footprint decides which active Allocation Strategy the Material will use. Out-of-the-box options include Allocation Strategies with the following configurations:

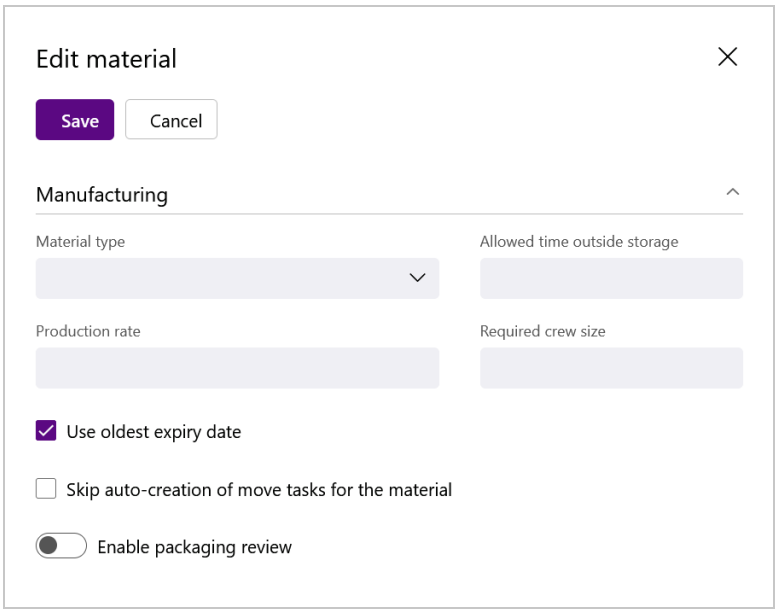
- **FIFO** (First In First Out) - The Inventory that entered the Warehouse first are assigned to Orders before newer Materials.
- **FEFO** (First Expired First Out) - Inventory whose Expiration Dates are nearest are assigned to Orders.
- **FMFO** (First Manufactured First Out) - The Inventory that was originally manufactured first are assigned to Orders before newer Materials.
- **LEFO** (Last Expired First Out) - The Inventory whose Expiration Dates are furthest away are assigned to Orders.
- **Largest Package First** - Prioritizes Packaging Types with larger physical dimensions over those with smaller, so that larger items are assigned to Orders first.
- **Requested Package First** - Prioritizes the Packaging Type specified on the Order Line over any other Packaging Types, so that the requested Packaging is assigned to Orders

whenever available.
- **Requested Package Only** - Only allows the Packaging Type specified on the Order Line to be assigned to the Order.
- **By Lot** - The FIFO / FEFO / FMFO / LEFO rules consider the create / expiration / manufacture date of the Inventory's assigned Lot.
- **By LP** - Available as a FIFIO option, prioritizing the oldest License Plates in the Warehouse for Orders over newer LPs.
- **Lot with LP** - The general FIFO / FEFO / FMFO / LEFO rules consider the create / expiration / manufacture date of the Inventory's assigned Lot, and then prioritize the oldest License Plates in the Warehouse from that Lot as the ones to assign to the Order.

Storage Category Rule:	Specifies the Storage Category to which the Material belongs.
Shelf Life:	The number of days the Material should be kept in the warehouse for. For a Lot Tracked Material, the Shelf Life is added to the Manufacture Date, and an Expiration Date is automatically created.
Minimum Dating Span:	After receiving, this puts the Material on hold for the amount of days specified.
Skip Inventory Count:	Indicates whether or not the Material is omitted from Cycle Counts altogether.
Skip Count Back:	If the Owner of this material requires a Count Back after picking, this setting will override that setting and skip the Count Back for just this Material.
Scan All Packagings:	Indicates whether or not the Material is required to have all Packages scanned to confirm a Cycle Count.
Allow Receiving:	Indicates whether or not the Material is able to be received.

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

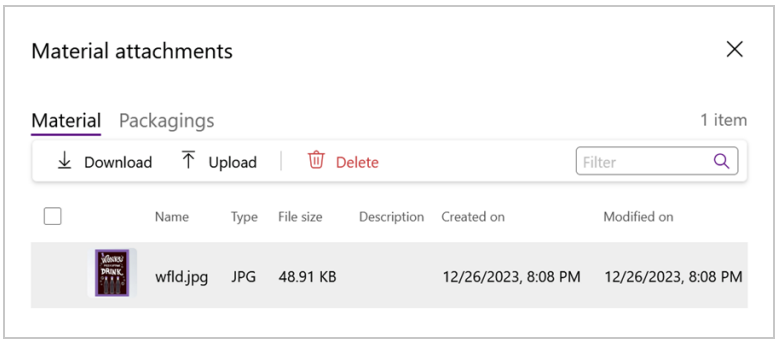
(Optional) Manufacturing



Material Type:	Indicates if the Material used in the Manufacturing process is a **Work In Progress** or the **Finished Product**.
Allowed Time Outside Storage:	The amount of time (in hours) the Material can spend outside its designated Storage Category.
Production Rate:	The number of units of the Material that should be used per hour in Production. Setting this helps the system determine Pick Tasks.
Required Crew Size:	The number of people required to manufacture the Material.
Use Oldest Expiry Date:	Uses the oldest component's Expiration Date as the new Expiration Date in the manufactured finished product.
Skip Auto-Creation of Move Tasks:	Checking this box indicates the Material does not need to be relocated when being used for Manufacturing, preventing the system from automatically creating Manufacturing Move Tasks for the Material. This can be useful for liquid Materials stored in vats, for example.
Enable Packaging Review:	When enabled, adds the ability to Review the Material's Packaging Types.
Set Packaging Review Reminder:	The date the users will be prompted to perform the packaging review for the manufactured material.
Review New Packaging Type After (in Days):	The number of days after a new Packaging Type is created for the Material that the Packaging Type must be Reviewed.

Attachments

The **Material Attachments** window allows users to view and upload file, including images, to correspond with a Material or its Packaging. Images files added here are used throughout the rest of Footprint to assist users in visually identifying the inventory in the warehouse.



By clicking the **Attachments** icon in the top toolbar, users can view and manage files, including images. Basic information about the file is displayed here.

Depending on which record type the **Attachments** button is clicked, 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

	A thumbnail image when the attachment file is an image file type.
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** option opens a window to locate and select a file to be added. For step-by-step instructions, please visit our **Add Attachments** tutorial.

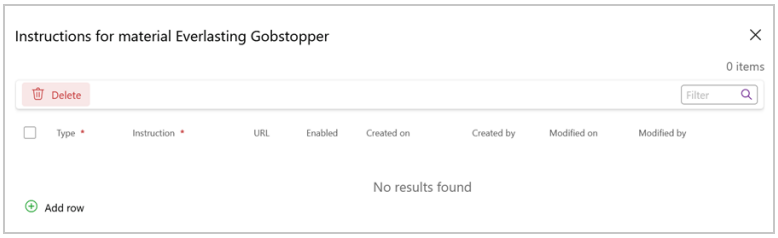
Selecting an existing file and clicking the **Download** option will open a confirmation window and then if confirmed, the file will be downloaded. Selecting an existing file and clicking **Delete** will open a confirmation window and if confirmed, the file will be deleted.

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.

Instructions

Material Instructions can be added so users know more about how to handle the Material. Material Instructions can be deleted using the **Delete** button in the Instructions window.



Material Instruction Details

Type:	The Type of Instruction for the Material. Examples include: Pick, Pack, Receive, Manufacturing, Inspection, Return, Load, and more.
Instruction:	The specific Instruction for the Material.
URL:	The URL in Footprint where the Material Instruction should appear.
Enabled:	Indicates whether or not the Instruction is enabled onthe specified URL for all users.
Created On:	The date the Instruction was created.
Created By:	The User that created the Instruction.
Modified On:	The date the Instruction was modified.
Modified By:	The User that modified the Instruction.

Material Record Tabs

Each Material record allows the user to review the Material's Inventory, License Plates, Activity, Packagings, Kits, Custom Fields, Serial Numbers (when applicable), Replenishments, Instructions, and more. Expand the sections below for more details about each tab.

For more details on all setup options, please visit our comprehensive **Setup a Material** tutorial.

Inventory

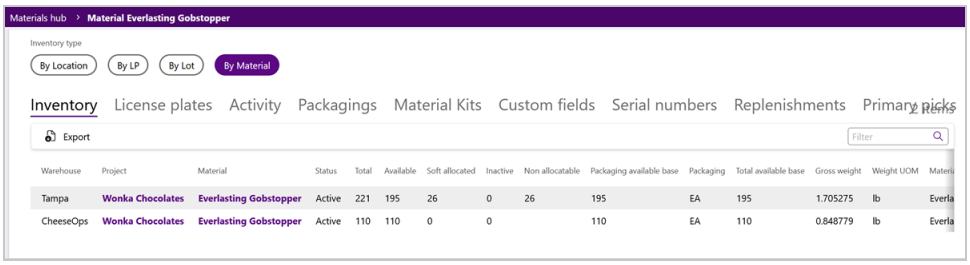
The Material **Inventory** tab lists all available instances of the selected Material. As users filter Materials, the tile counts in the top right corner will update to match.

The **Inventory** tab is grouped by Materials by default. Material Inventory can also be grouped by Location, License Plate, and Lot. The information displayed in the Inventory tab will change depending upon the selected grouping.

Material Inventory Tab Details

By Material

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

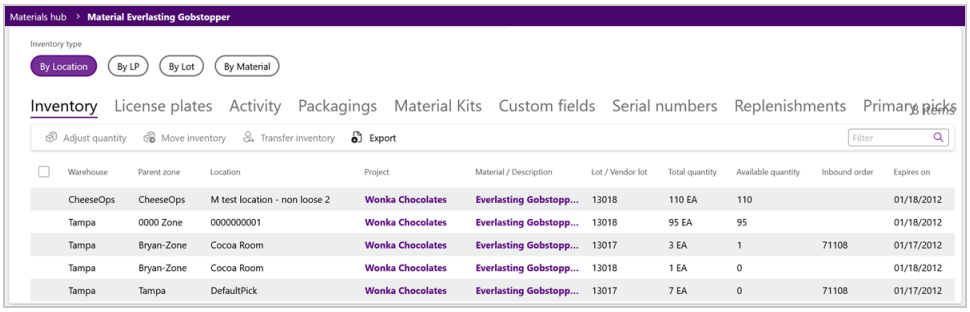


Warehouse:	The Warehouse in which the Material is located.
Project:	The Project the Material is part of.
Material:	The name of the Material.
Status:	The status of the Material.
Total:	The total amount of the Material in each Warehouse listed.
Available:	The amount of the Material available for use in Orders.
Soft Allocated:	The amount of the Material which is reserved for Order(s) in the system, but not yet set aside physically.
Inactive:	Amount of Material stored, but not in the Active Status.
Non Allocatable:	The amount of the Material that is not available for Allocation.
Packaging Available Base:	The quantity of the Material available in its base level Packaging.
Packaging:	The Packaging level of the Material.
Total Available Base:	The total quantity of the Material available for its base level Packaging.
Gross Weight:	The total weight of the Material, including the Packaging.

Weight UOM:	The Unit of Measurement being used for the weight of the Material.
Material Description:	A description of the Material.

By Location

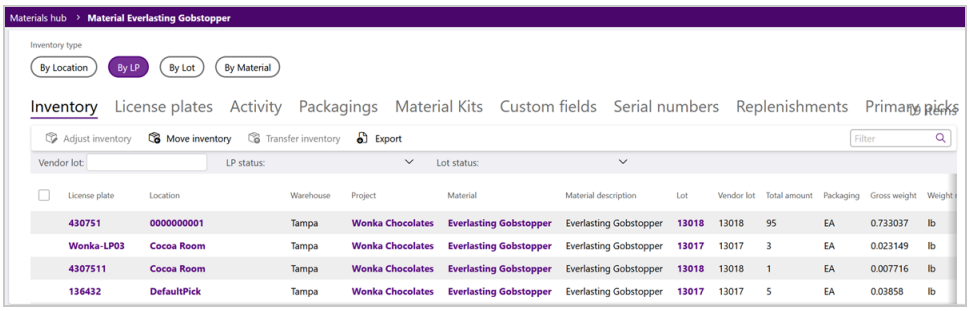
When viewing Material Inventory by Location, users have the options to **Adjust Quantity**, **Move Inventory**, **Transfer Inventory**, and **Export** details for the selected rows.



Warehouse:	The Warehouse in which the Material is located.
Parent Zone:	The Parent Zone of the Warehouse in which the Material is located.
Location:	The physical Location of the Material in the Warehouse.
Project:	The Project the Material is part of.
Material / Description:	The name and description of the Material.
Lot / Vendor Lot:	The Lot and Vendor Lot the Material is part of.
Total Quantity:	The total amount of the Material in the Location.
Available Quantity:	The total amount of the Material in the Location available for use in Orders.
Inbound Order:	The Inbound Order that brought the Inventory into the Location.
Expires On:	The date the Material in the Location expires.

By License Plate

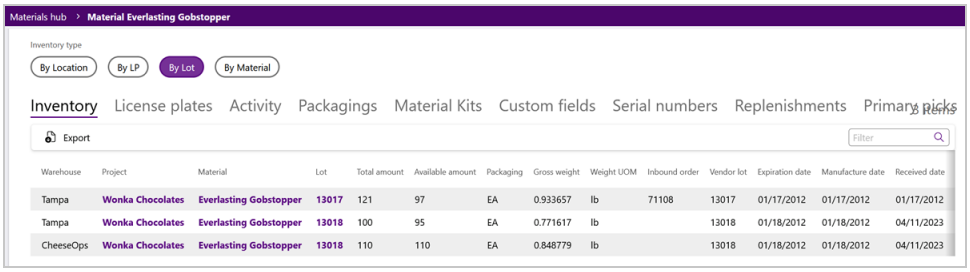
When viewing Material Inventory by License Plate (LP), users can search for a specific **Vendor Lot**, as well as filter by **LP Status** and **Lot Status**. Clicking a License Plate from this tab will open the License Plate for review and management.



License Plate:	The License Plate number the Material is assigned to.
Location:	The physical Location of the Material in the Warehouse.
Warehouse:	The Warehouse in which the Material is located.
Project:	The Project the Material is part of.
Material:	The name of the Material.
Material Description:	A description of the Material.
Lot:	The Lot the Material is part of.
Vendor Lot:	The Vendor Lot the Material belongs to.
Total Amount:	The total amount of the Material in the License Plate.
Packaging:	The Packaging level of this Material.
Gross Weight:	The total weight of the Material, including the Packaging.
Weight Measure:	The Unit of Measure being used for the weight of the Material.
Manufactured On:	The date the Material in the License Plate was manufactured.
Expires On:	The date the Material in the License Plate expires.
Received On:	The date the Material in the License Plate was received.

By Lot

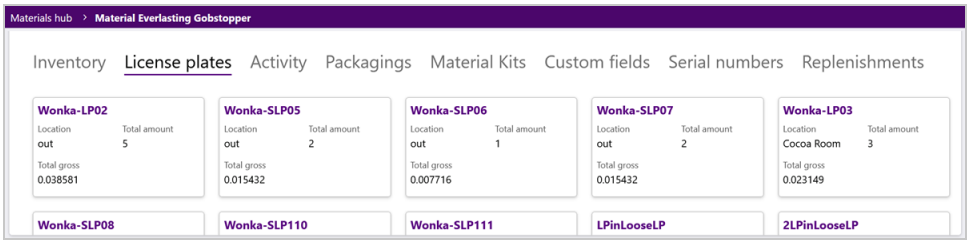
Selecting a row or multiple rows allows users to **Export** the selected details to an Excel spreadsheet.



Warehouse:	The Warehouse in which the Material is located.
Project:	The Project the Material is part of.
Material:	The name of the Material.
Lot:	The Lot the Material is part of.
Total Amount:	The total amount of the Material in the Lot.
Available Amount:	The amount of the Material in the Lot available for use in Orders.
Packaging:	The Packaging level of this Material.
Gross Weight:	The total weight of the Material, including the Packaging.
Weight UOM:	The Unit of Measurement being used for the weight of the Material.
Inbound Order:	The Inbound Order that brought in the Lot Inventory.
Vendor Lot:	The Vendor Lot the Material belongs to.
Expiration Date:	The date the Material in the Lot expires.
Manufacture Date:	The date the Material in the Lo was manufactured.
Received Date:	The date the Material in the Lot was received.
Material Description:	A description of the Material.

License Plates

The Material **License Plates** tab displays all License Plates associated with the Material. Users can click the LP to open it for review and management.

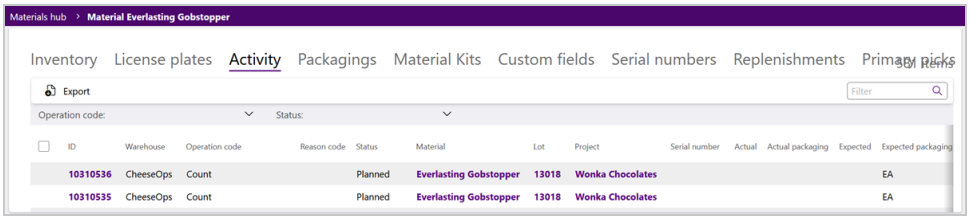


Material License Plates Tab Details

License Plate:	The License Plate number the Material is assigned to.
Location:	The physical Location of the Material in the Warehouse.
Total Amount:	The total amount of the Material in the License Plate.
Total Gross:	The total weight of the Material, including the Packaging.

Activity

The Material **Activity** tab lists all Activities associated with the Material. When viewing Material Activity, users can filter Activity by **Operation Code** and **Status**. Selecting a row or multiple rows allows users to **Export** the selected details to an Excel spreadsheet.



Material Activity Tab Details

ID:	The Activity ID for the Material Activity.
Warehouse:	The Warehouse in which the Material Activity took place.
Operation Code:	The Operation Code for the Material Activity.
Reason Code:	The Reason Code for the Material Activity.
Status:	The Status of the Material Activity.
Material:	The name of the Material.
Lot:	The Lot the Material involved in the Activity is part of.
Project:	The Project the Material is part of.
Serial Number:	The Serial number of the Material involved in the Activity.
Actual:	The actual amount of the Material involved in the Activity.
Actual Packaging:	The actual Packaging of the Material involved in the Activity.
Expected:	The expected amount of the Material involved in the Activity.
Expected Packaging:	The expected Packaging of the Material involved in the Activity.
Order:	The Order number associated with the Activity.
Created Date:	The date the Activity was created.
Completed Date:	The date the Activity was completed.
User:	The User that completed the Activity.
Actual Source LP:	The actual Source License Plate number involved in the Activity.
Actual Source Loc:	The actual physical Source Location involved in the Activity.
Actual Target LP:	The actual Target License Plate number involved in the Activity.
Actual Target Loc:	The actual physical Target Location involved in the Activity.

Expected Source LP:	The expected Source License Plate number involved in the Activity.
Expected Source Loc:	The expected physical Source Location involved in the Activity.
Expected Target LP:	The expected Target License Plate number involved in the Activity.
Expected Target Loc:	The expected physical Target Location involved in the Activity.
Order Reference:	The Order Reference number associated with the Activity.
Order PO:	The Order PO number associated with the Activity.
Notes:	Any Notes associated with the Activity.

Packagings

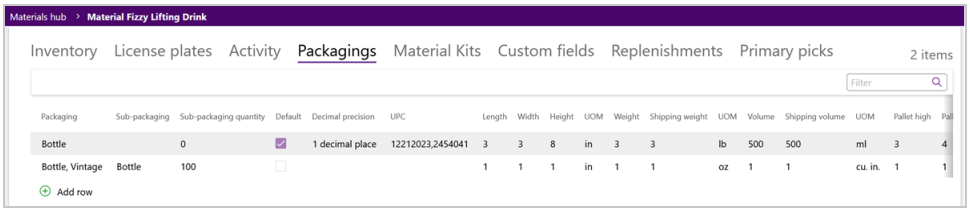
The Material **Packagings** tab allows for the Material's Packagings to be setup. Any existing Packagings are listed for review and management.

Users 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, start over by adding another Packaging, and then in the **Sub Packaging** field, select the Packaging that would go inside the new Packaging. In the **Sub Package Qty** field, enter the number of smaller Packages it takes to fill the new Packaging level. Continue this way for as many levels deep as are needed.



Material Packagings Tab Details

Packaging:	The base level Packaging type.
Sub-Packaging:	If there is a level of Packaging 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 which are able to be contained within the Packaging.
Default:	When enabled, this Package level will be the default level for the Material. May be tied to Billing.
Decimal Precision:	Allows the Package to be split into fractions. The **No Decimals** setting 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.
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 Package.
Width:	Width of Package.
Height:	Height of Package.
UOM:	Unit of measurement for distance. Options include meter, centimeter, foot, and inch.
Weight:	Weight of the items in this Package.
Shipping Weight:	Weight of the items in this Package, combined with the weight of the Package 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 Package. Footprint automatically computes a volume based on the length width and height, which is displayed underneath those measurements. Enter that here.
Shipping Volume:	Volume of the Package considering any other factors that may impact the Package before Shipping.
UOM:	Unit of measurement for volume. Options include cubic meter, cubic centimeter, cubic foot, and cubic inch.
Pallet High:	The number of this Package that can be stacked atop each other on a Pallet.
Pallet Tie:	The number of this Package to be placed on the first level of the Pallet before you begin stacking atop them.
Shippable Container:	When enabled, this Packaging can be used as an actual Shipping 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.
Stack Group:	A field for entering a group name for this item when Stacked. Used for Cartonization process.

*Those in red are required fields.

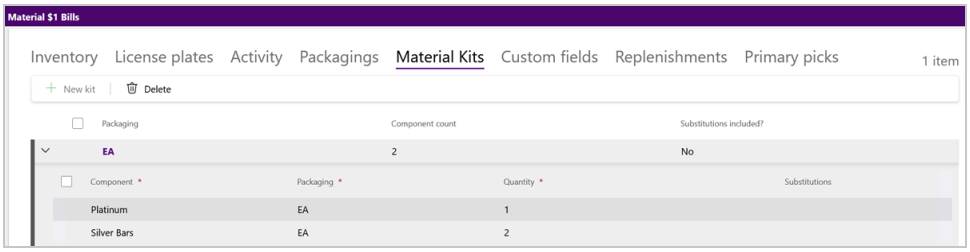
Material Kits

The **Material Kits** tab displays any Kits for the Material. Options in the Material Kits tab toolbar allow users to **create a Material Kit** and **Delete** selected Material Kit(s).

Example

A **Table** Material Kit may be composed of four **Table Leg** Materials and one **Table Surface** Material.

When a Kit exists, users can click the arrow icon to view the Material Kit Components. Users can edit Kit Components by clicking the purple name of the Kit, which opens the Kit Components window for updates.



Material Kits Tab Details

The following details are related to the Material Kit as a whole.

Packaging:	Each different level of Packaging for the Material can have a different combination of Kit Components. The Components of the selected Packaging Type are shown in the Kit Components pane.
Component Count:	The number of component Materials to be included in the kit.
Substitutions Included?:	When enabled, allows components in the Kit to be substituted by other specified Materials.

Material Kits Tab Component Details

The following details are related to the Material Kit Components individually.

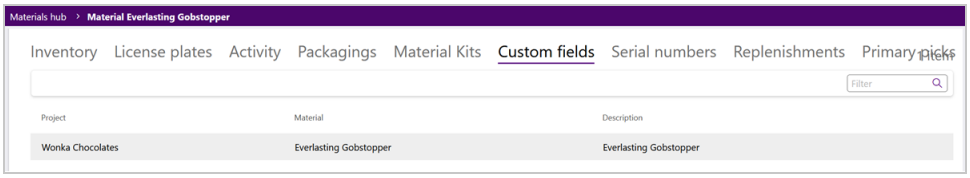
Component:	The individual Materials that will make up the kit. The Materials available for selection must already exist under the Owner of the Kit.

Packaging:	The Packaging Type of the Material that is being used in the Kit. The options available are those available to the component Material.
Quantity:	The number of units of the specified component Material to be included in the kit.
Substitutions:	The substitute Materials for the specified component Material. The Materials selected here must already exist under the Owner of the Kit. More than one Substitute Component Material can be added when needed.

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

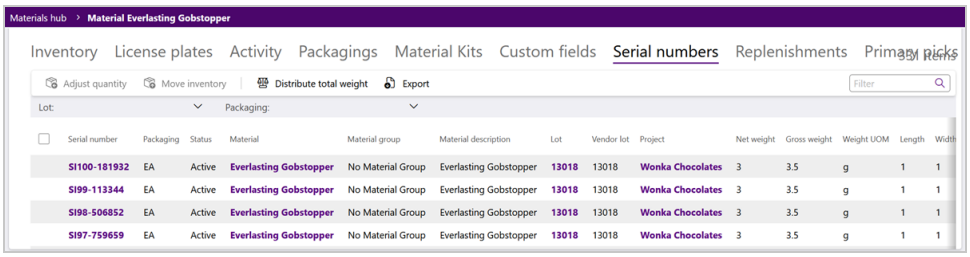
Custom Fields

The Material **Custom Fields** tab displays any custom fields related to Materials.



Serial Numbers

The Material **Serial Numbers** tab only displays when the Material is Serial Tracked/Controlled. The Material Serial Numbers will be listed for review and management. Users have the option to **Adjust Quantity**, **Move Inventory**, and **Distribute Total Weight**. Selecting a row or multiple rows allows users to **Export** the selected details to an Excel spreadsheet. Users can also filter the Serial Materials by **Lot** and **Packaging**.



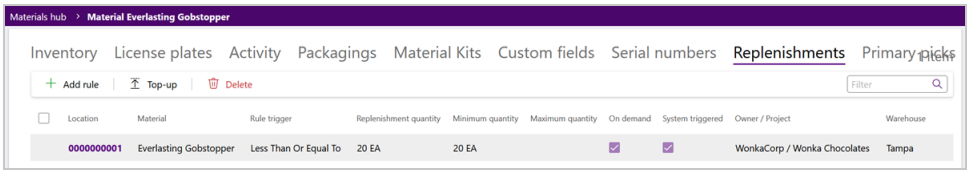
Material Serial Numbers Tab Details

Serial Number:	The unique Serial number assigned to the Material item.
Packaging:	The Packaging Type of the Material.
Status:	The Status of the Serial Material.

Material:	The name of the Material.
Material Group:	The Material Group associated with the Material.
Material Description:	A short description of the Material.
Lot:	The Lot the Material is part of.
Vendor Lot:	The Vendor Lot the Material belongs to.
Project:	The Project the Material is part of.
Net Weight:	The Net Weight of the Material.
Gross Weight:	The total Gross Weight of the Material, including the Packaging.
Weight UOM:	Unit of measurement for weight.
Length:	Length of Material.
Width:	Width of Material.
Height:	Height of Material.
Dimension Measure:	Unit of measurement for distance.
Net Volume:	The Net Volume of the Material.
Gross Volume:	The total Gross Volume of the Material, including the Packaging.
Volume UOM:	Unit of measurement for volume.
Fixed Dimensions:	Indicates whether or not the Material Dimensions are always fixed.
Created Date:	The date the Serial Number was created.
Created User:	The User that created the Serial Number.
LP Type:	The Type of License Plate the Material is assigned to.
LP:	The License Plate number the Material is assigned to.
Location:	The physical Location of the Material in the Warehouse.
Warehouse:	The Warehouse in which the Material is located.
Notes:	Any Notes related to the Serial Material.

Replenishments

The Material **Replenishments** tab lists any Replenishments for the Material in the specified Location. The toolbar allows users to **Add Rules**, **Top-Ups**, and **Delete** Replenishment Rules.



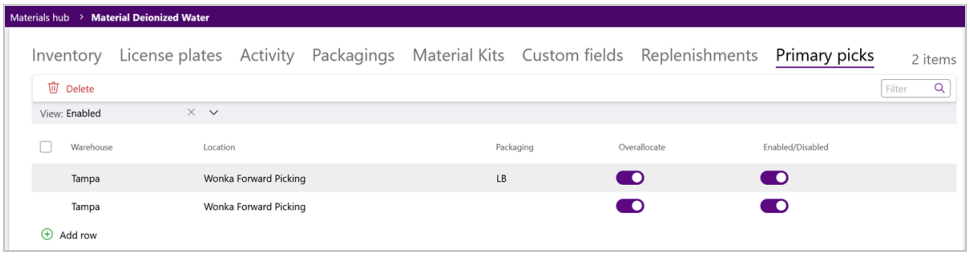
Material Replenishments Tab Details

Location :	The Location of the Replenishment Material.
Material:	The name of the Material.
Rule Trigger:	The Rule that Triggers the Replenishment.
Replenishment Quantity:	The amount of the Material that is Replenished once Triggered.
Minimum Quantity:	Once the number of Packages of the Material in the Location drops below this number, a Replenishment Task will be created.
Maximum Quantity:	The maximum total of Packages that can be stored for this Material.
On Demand:	When enabled Replenishment Tasks will not be created automatically, but the Materials can be Replenished manually as needed.
System Triggered:	When enabled, Replenishment Tasks will be automatically created when a Replenishment Event is triggered.
Owner / Project:	The Owner and Project of the Replenishment Materials.
Warehouse:	The Warehouse where the Replenishment Materials are held.

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

Primary Picks

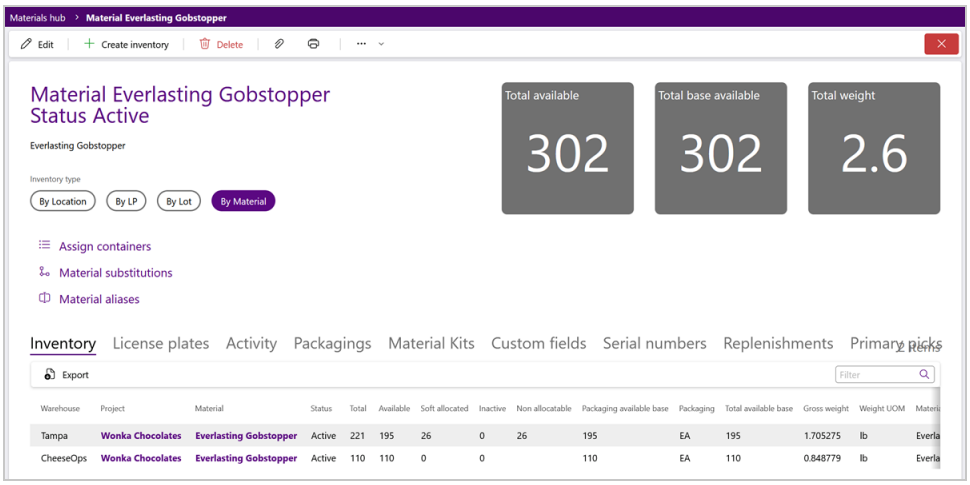
The Material **Primary Picks** tab lists any designated Primary Pick Locations for the Material. The **Delete** button in the Primary Pick tab toolbar allows users to delete the selected Material Primary Pick Location(s).



Material Primary Picks Tab Details

Warehouse:	The Warehouse where the Primary Pick Location for the Material exists.
Location:	The Primary Pick Location.
Packaging:	The Packaging Type to Primarily Pick from this Location.
Overallocate:	When enabled, this allows Over Allocation from this Primary Pick Location.

Enabled / Disabled: When enabled, the Material will use this as a Primary Pick Location.



Set Up a Material

Materials are created at the Owner and Project level and describe the specific details of your Inventory. The setup steps detailed below allow further configuration of the Materials in the Warehouse.

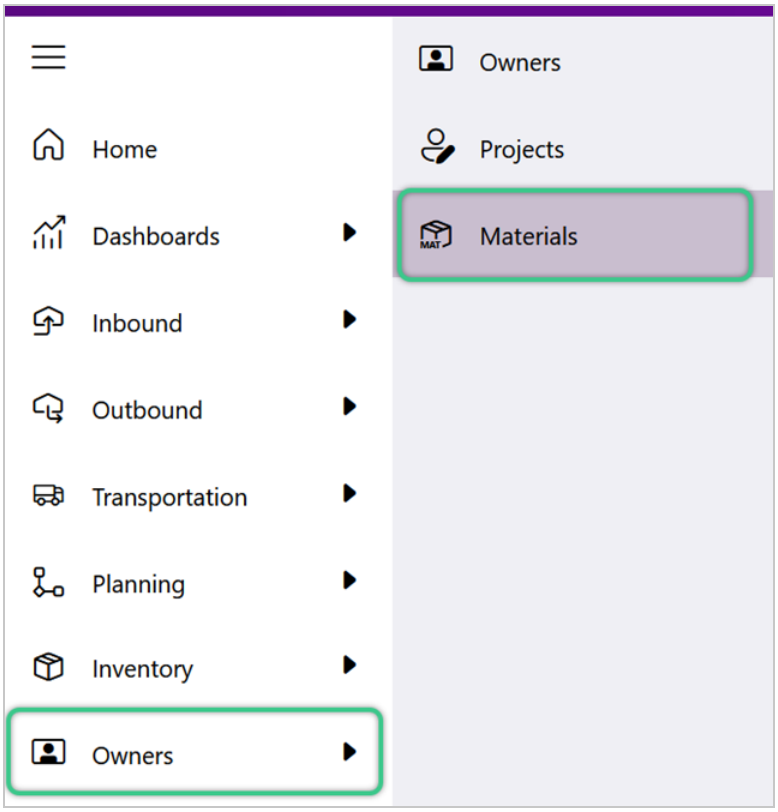
✠ Prerequisites

- Owner
- Project
- Packaging

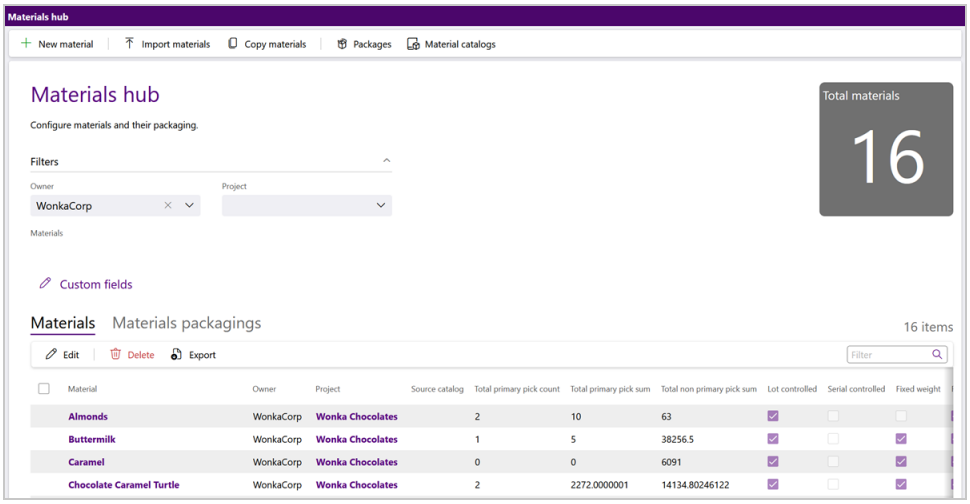
Step 1. Create a New Material

Step 1. Open the Materials Hub

1. Click **Owners** in the left navigation menu and select **Materials**.

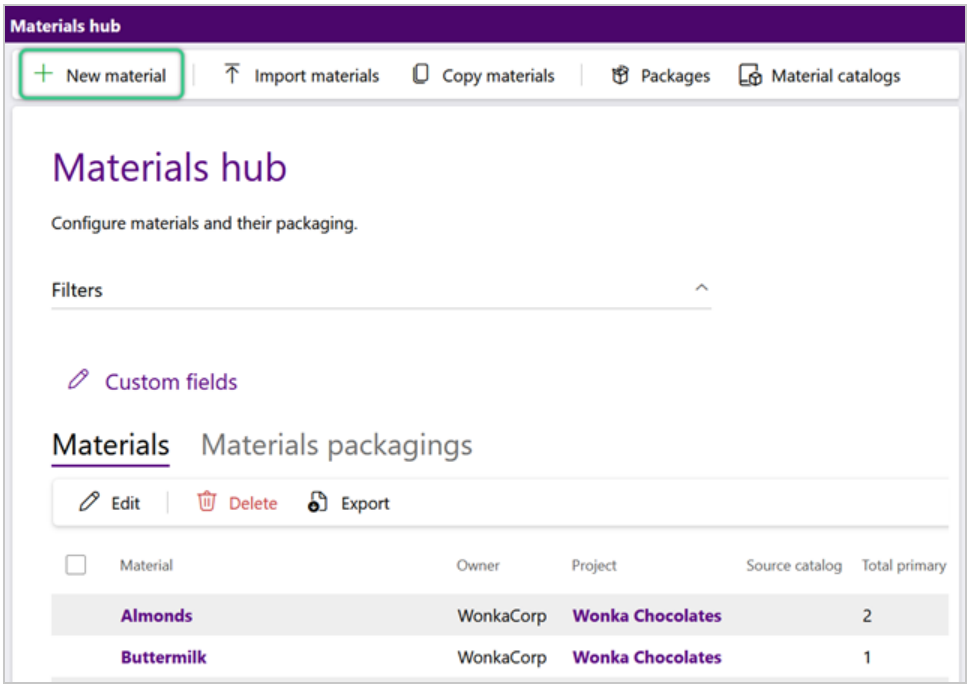


The **Materials Hub** will display.

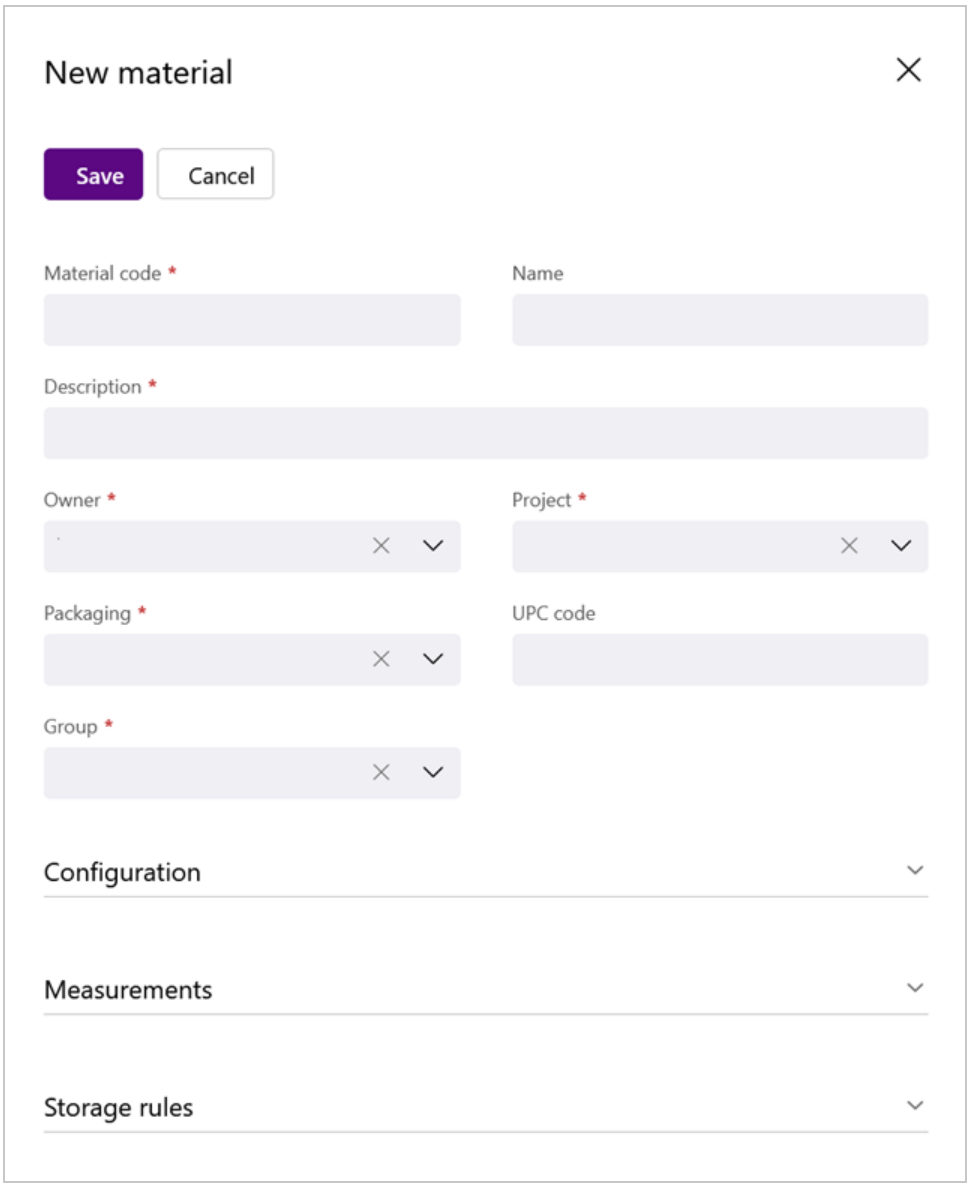


Step 2. Create the New Material

1. Click **+ Create Material** in the top menu.



The **New Material** window will display.

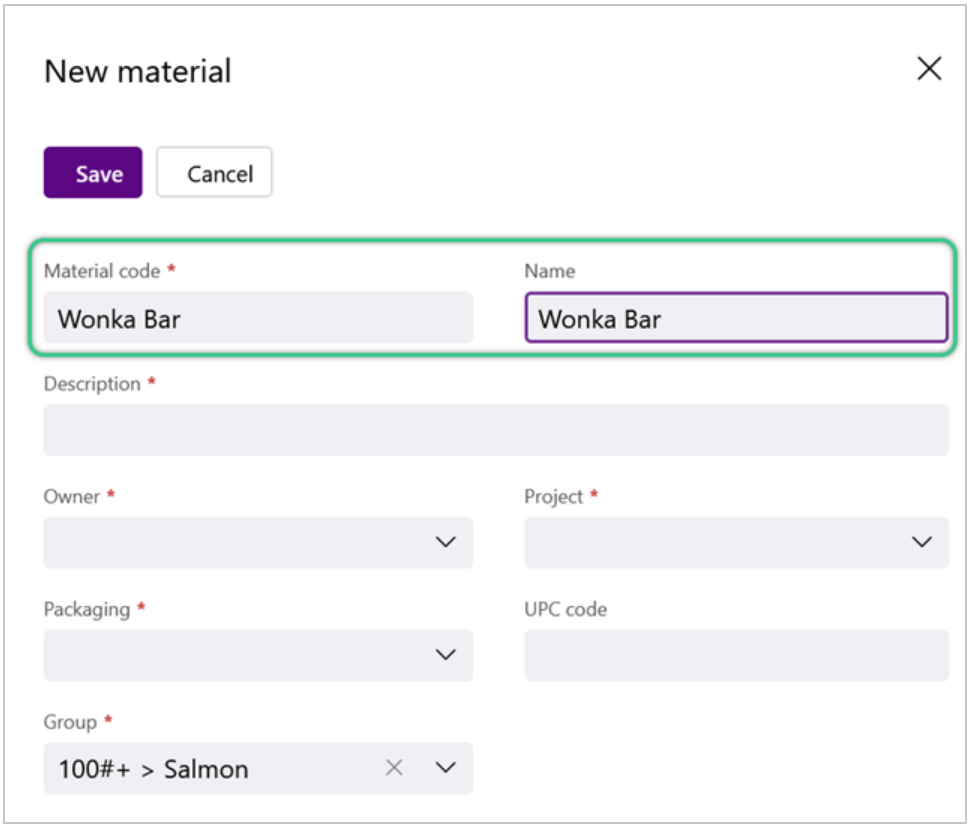


Step 3. Enter Material Basics

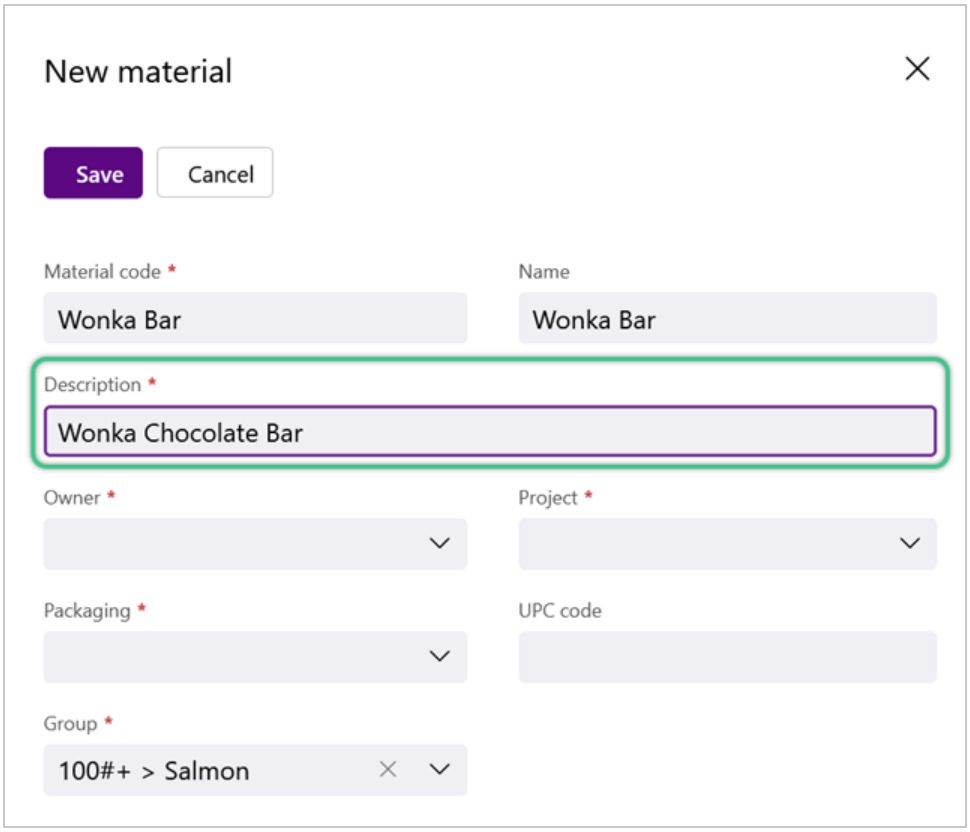
1. Enter a required short **Material Code** used to reference the material, and an optional **Name** for the material.

❑Note

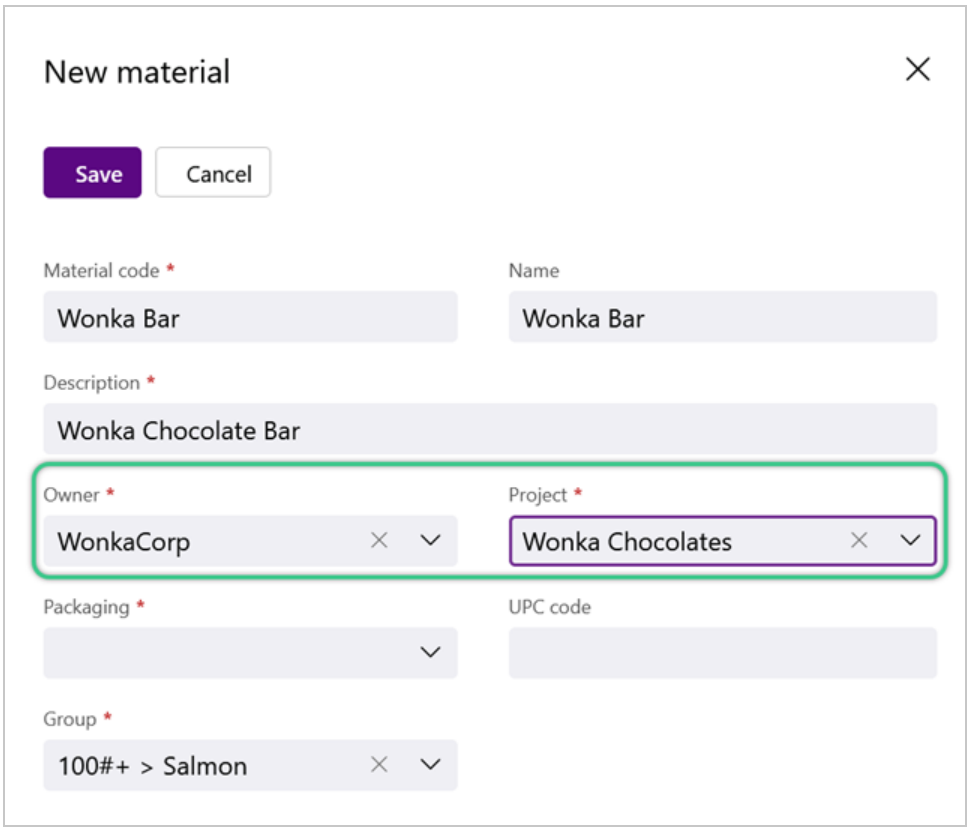
The required details are indicated with a red asterisk - all other details are optional and can be filled out, but are not necessary. See the Materials Guide for more information.



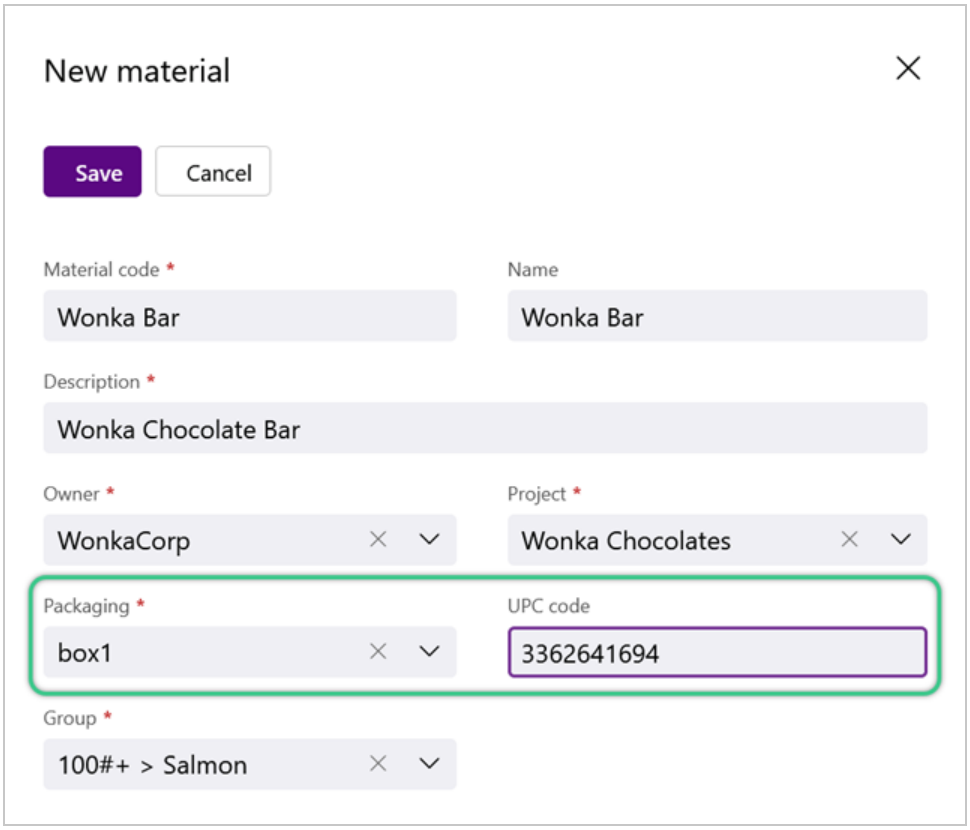
2. Enter a required **Description** for the new material.



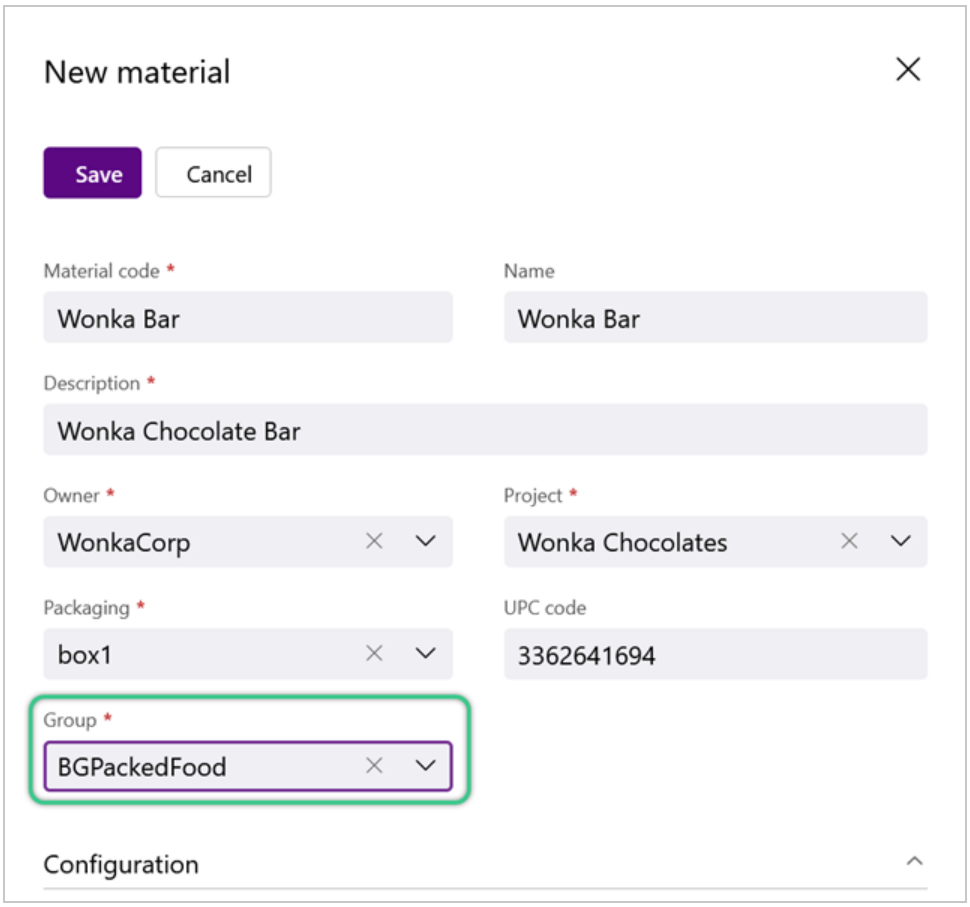
3. Select the required **Owner** and an affiliated **Project**.



4. Select a required **Packaging** from the drop down and enter one or more optional **UPC Codes**, separated by a comma.



5. Select a required material **Group**.



Step 4. Configure the Material

The **Allocation Strategy** takes into account related material information when creating Pick Slips for Outbound Shipments. 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).

1. Select a required **Allocation Strategy**.

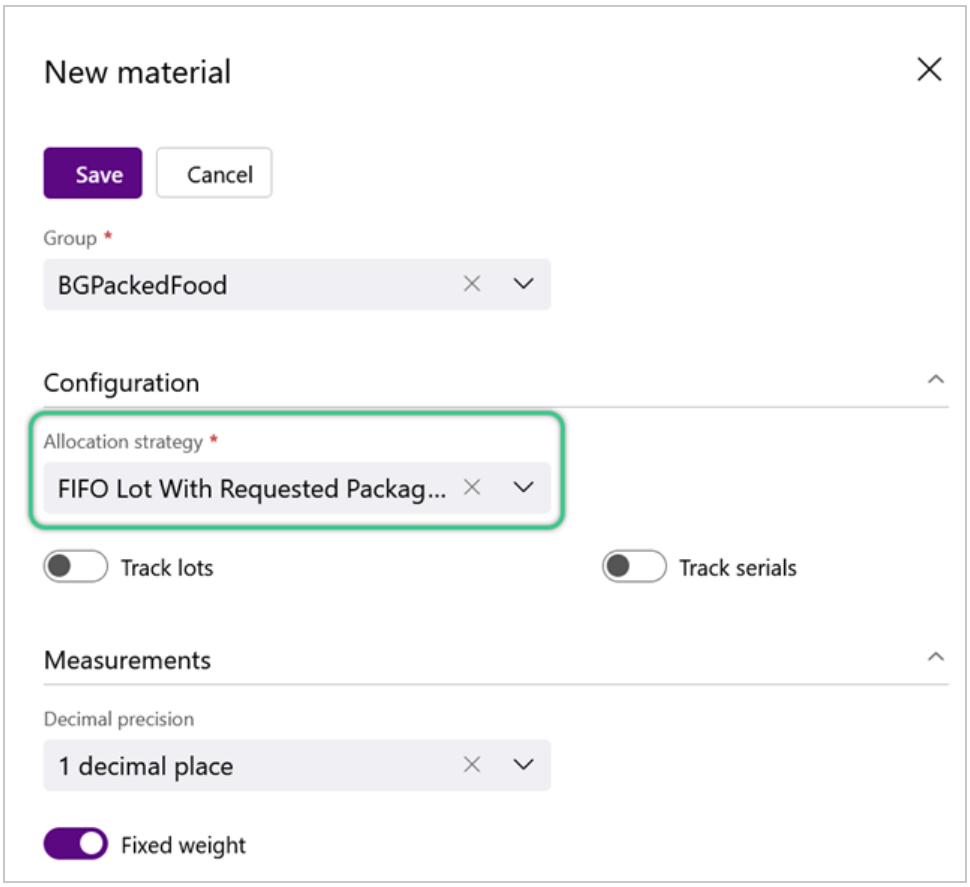
Allocation Strategies

- **FEFO** - First Expired, First Out. Inventory whose Expiration Dates are nearest are assigned to Orders.
- **FIFO** - First In, First Out. The Inventory that entered your Warehouse first are assigned to Orders before newer Materials.
- **FMFO** - First Manufactured, First Out. The Inventory that were originally manufactured first are assigned to Orders before newer Materials.
- **LEFO** - Last Expired, First Out. The Inventory whose Expiration Dates are furthest away are assigned to Orders.
- **Largest Package First** - Prioritizes Packaging Types with larger physical dimensions over those with smaller, so that larger items are assigned to Orders first.
- **Requested Package First** - Prioritizes the Packaging Type specified on the Order Line over any other Packaging Types, so that the requested Packaging is assigned to Orders whenever available.
- **Requested Package Only** - Only allows the Packaging Type specified on the Order Line to be assigned to the Order.
- **By Lot** - The FIFO / FEFO / FMFO / LEFO rules consider the create / expiration / manufacture date of the Inventory's assigned Lot.
- **By LP** - Available as a FIFIO option, prioritizing the oldest License Plates in your Warehouse for Orders over newer LPs.
- **Lot with LP** - The general FIFO / FEFO / FMFO / LEFO rules consider the create / expiration / manufacture date of the Inventory's assigned Lot, and then prioritize the oldest License Plates in your Warehouse from that Lot as the ones to assign to the Order.

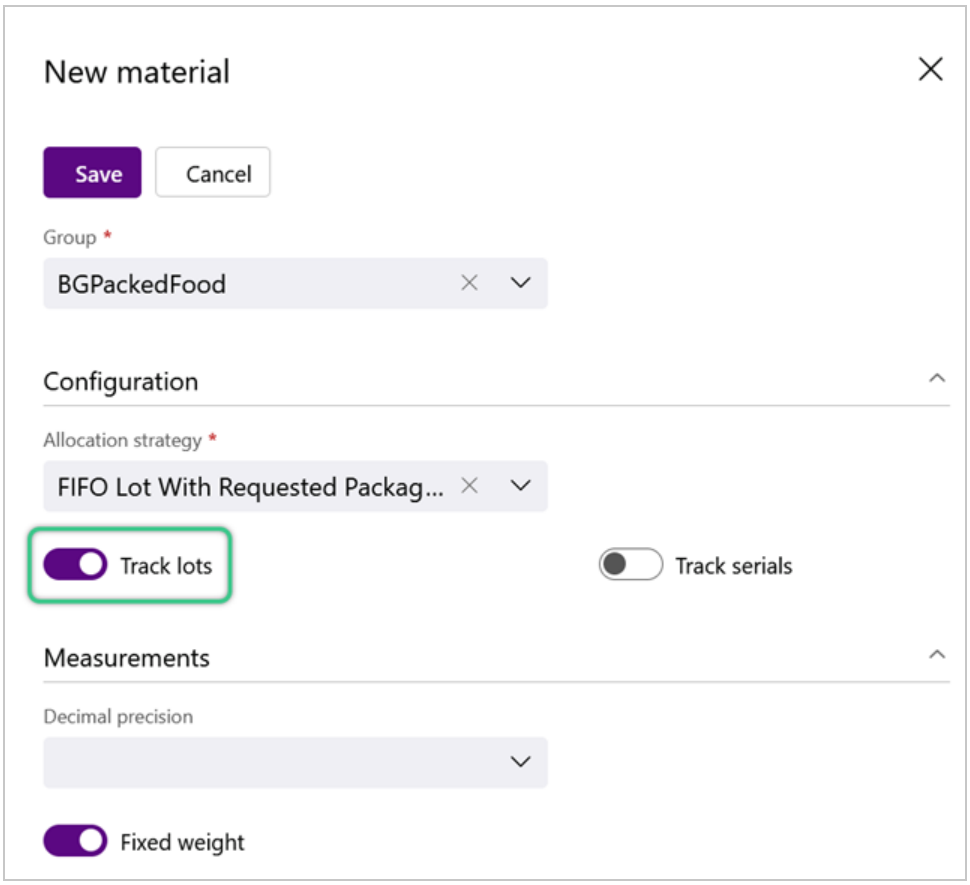
By selecting which option you would prefer here, you are telling the system to automatically search through that information when creating Pick Slips for Outbound Shipments, and choose what Inventory to Ship based on your preference.

Tip

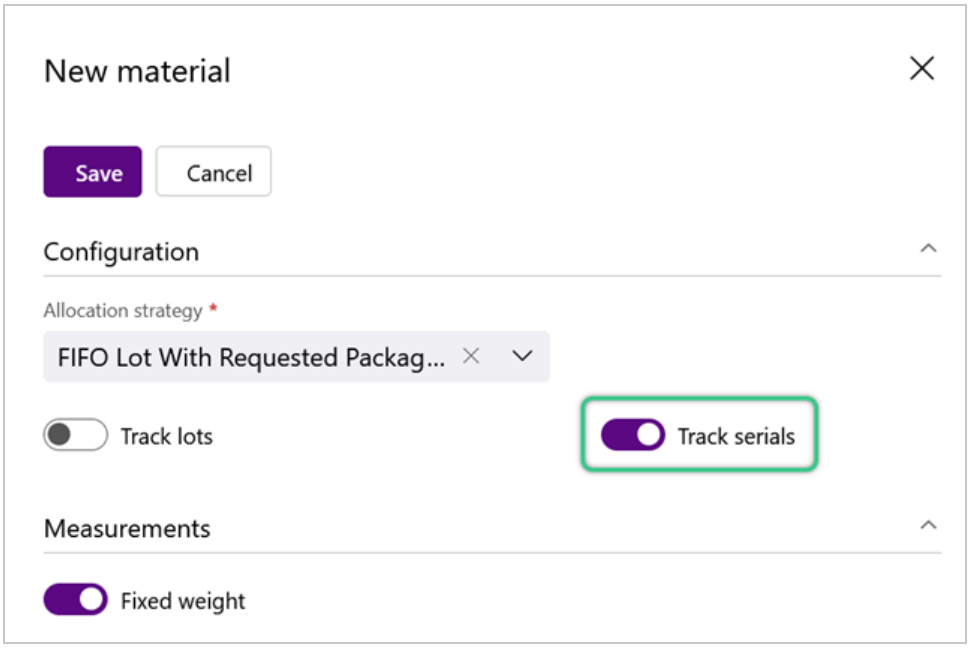
These options will only work when a material is lot controlled. However, checking the **Use License Plate FIFO** box allows the Allocation to be done based on the License Plates to which the material is assigned.


New material
Save
Cancel
Group *
BGPackedFood
Configuration
Allocation strategy *
FIFO Lot With Requested Packag...
Track lots
Track serials
Measurements
Decimal precision
1 decimal place
Fixed weight

2. To track individual Lots of this new material, click the **Track Lots** toggle to ensure the material will be lot controlled.

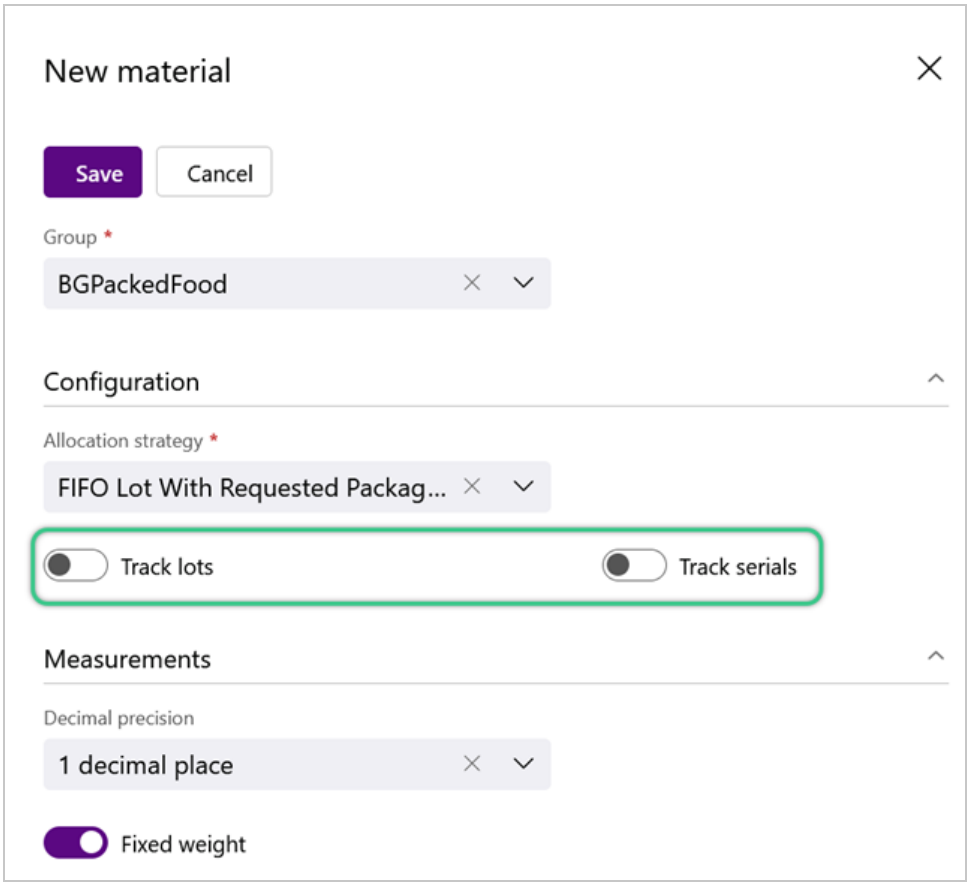


3. To track product Serial Numbers/custom fields, as well as assign these materials a Generic Lot, or Glot, click the **Track Serials** toggle to ensure the material will be serial controlled.



If tracking of lots/serial numbers is not required, leave both toggles off. These materials will be assigned a Generic Lot, or GLot.

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

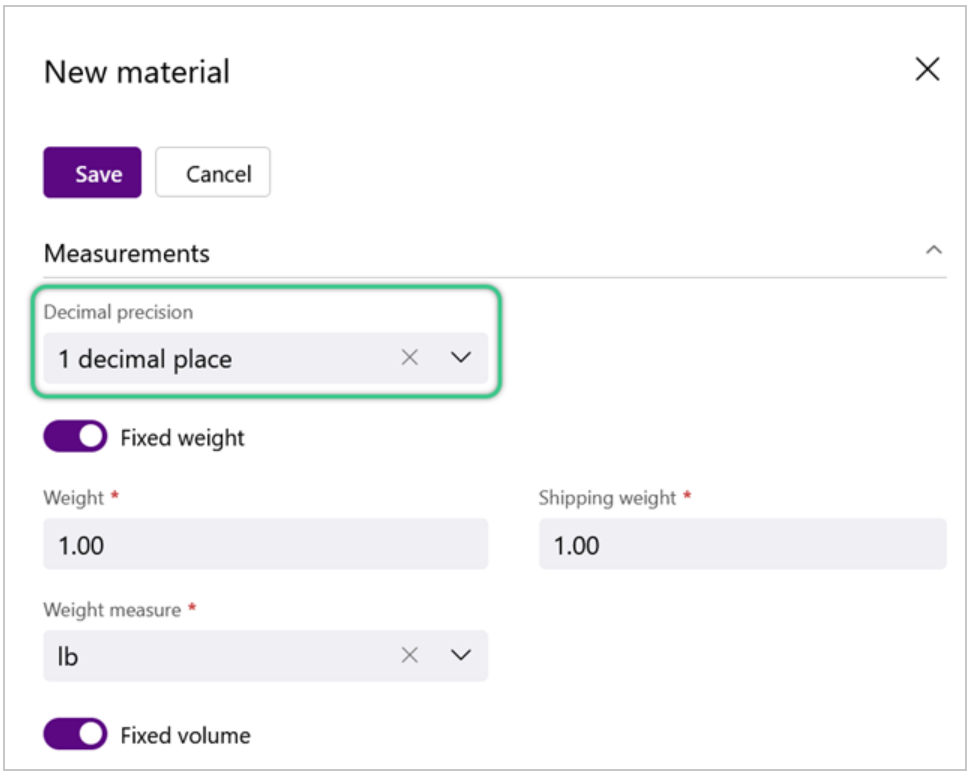


Step 5. Enter Material Measurements

❑Warning

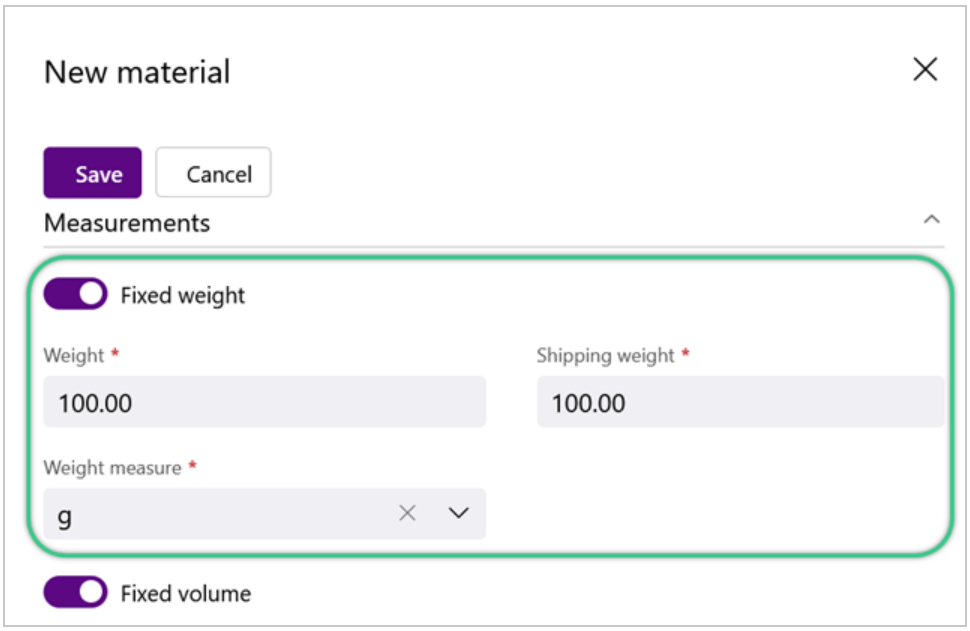
Be sure to enter values here, otherwise they will default to '1' upon creation of the new material.

1. Set the **Decimal Precision** for the new material's measurements.



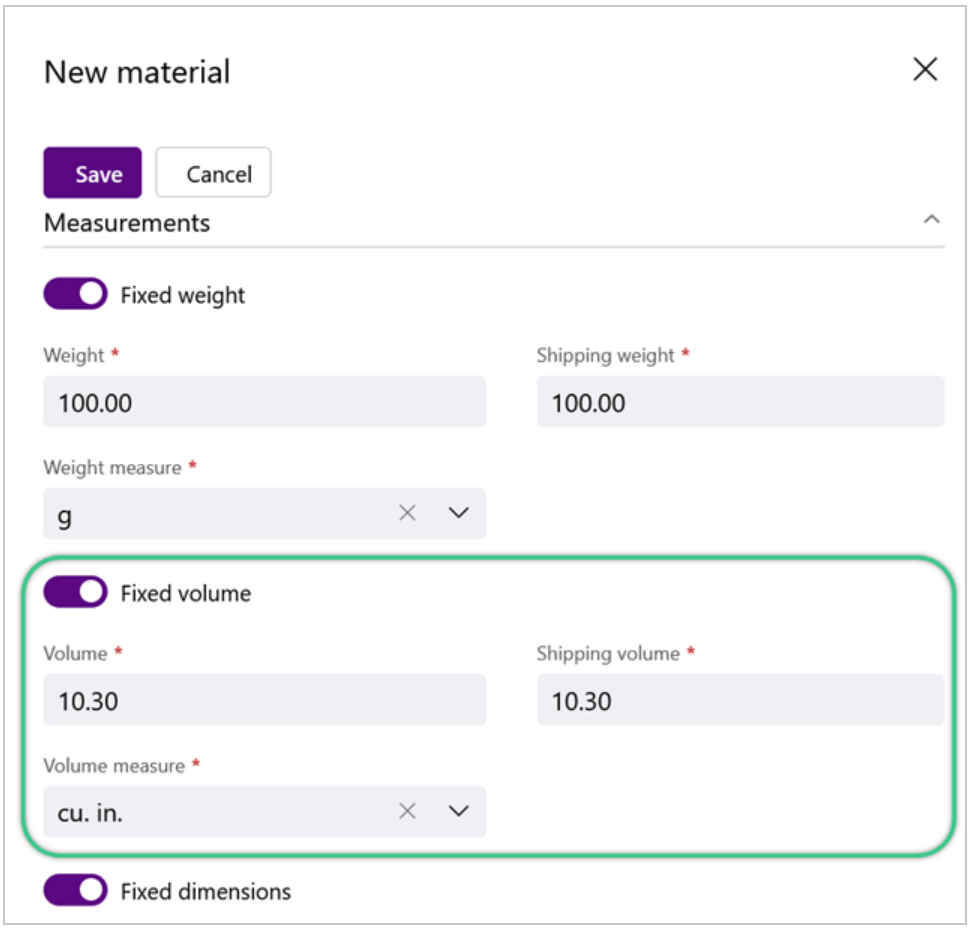
2. Indicate whether or not the material has a **Fixed Weight**.

3. Specify the required **Weight** (weight before additional shipping packaging) and **Shipping Weight** (total weight), then select the **Weight Measure**.



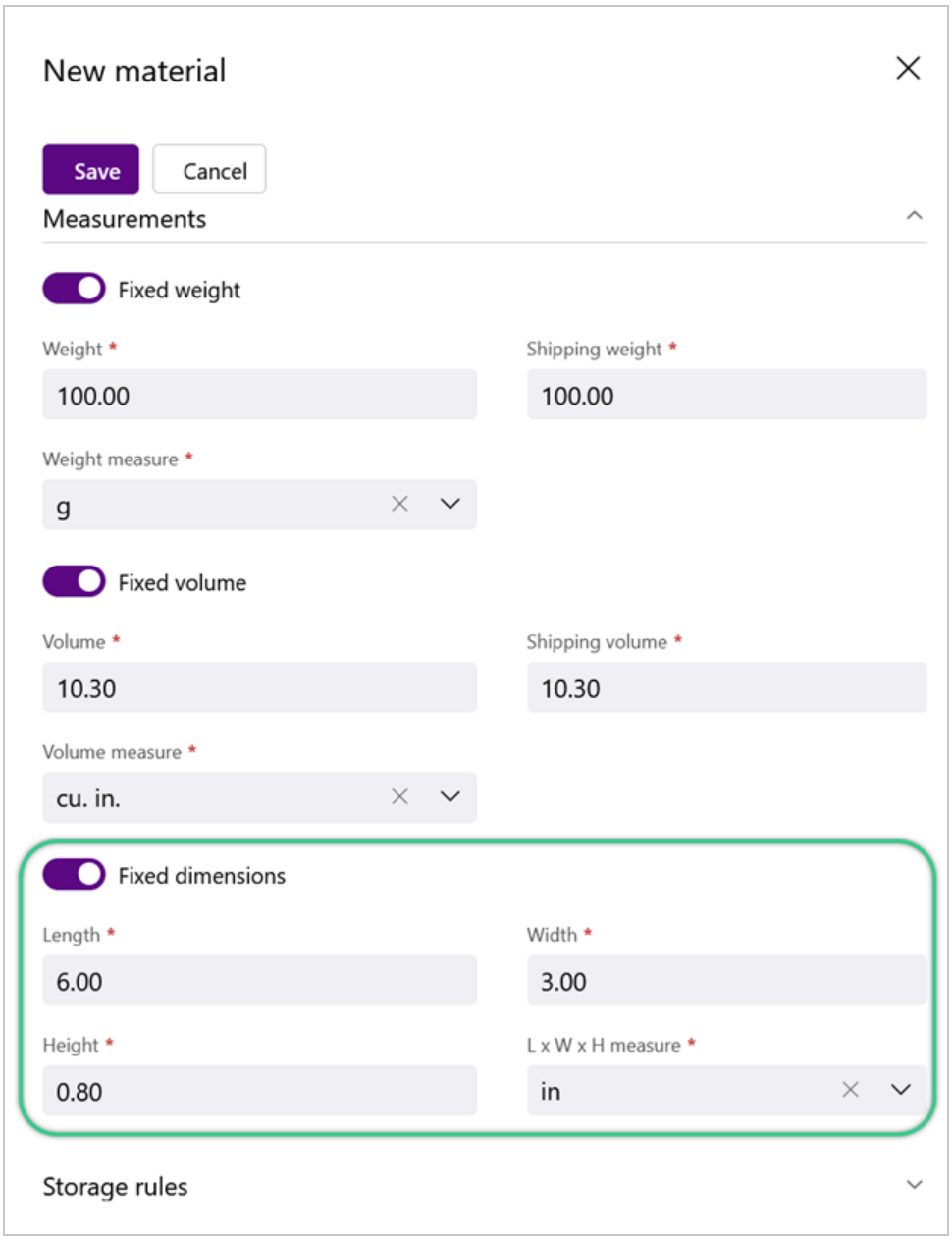
4. Indicate whether or not the material has a **Fixed Volume**.

5. Specify the required **Volume** (volume before additional shipping packaging) and **Shipping Volume** (total volume), then select the **Volume Measure**.



6. Indicate whether or not the material has a **Fixed Dimension**.

7. Specify the required **Length**, **Width**, and **Height** of the material, then select the **L x W x H Measure**.

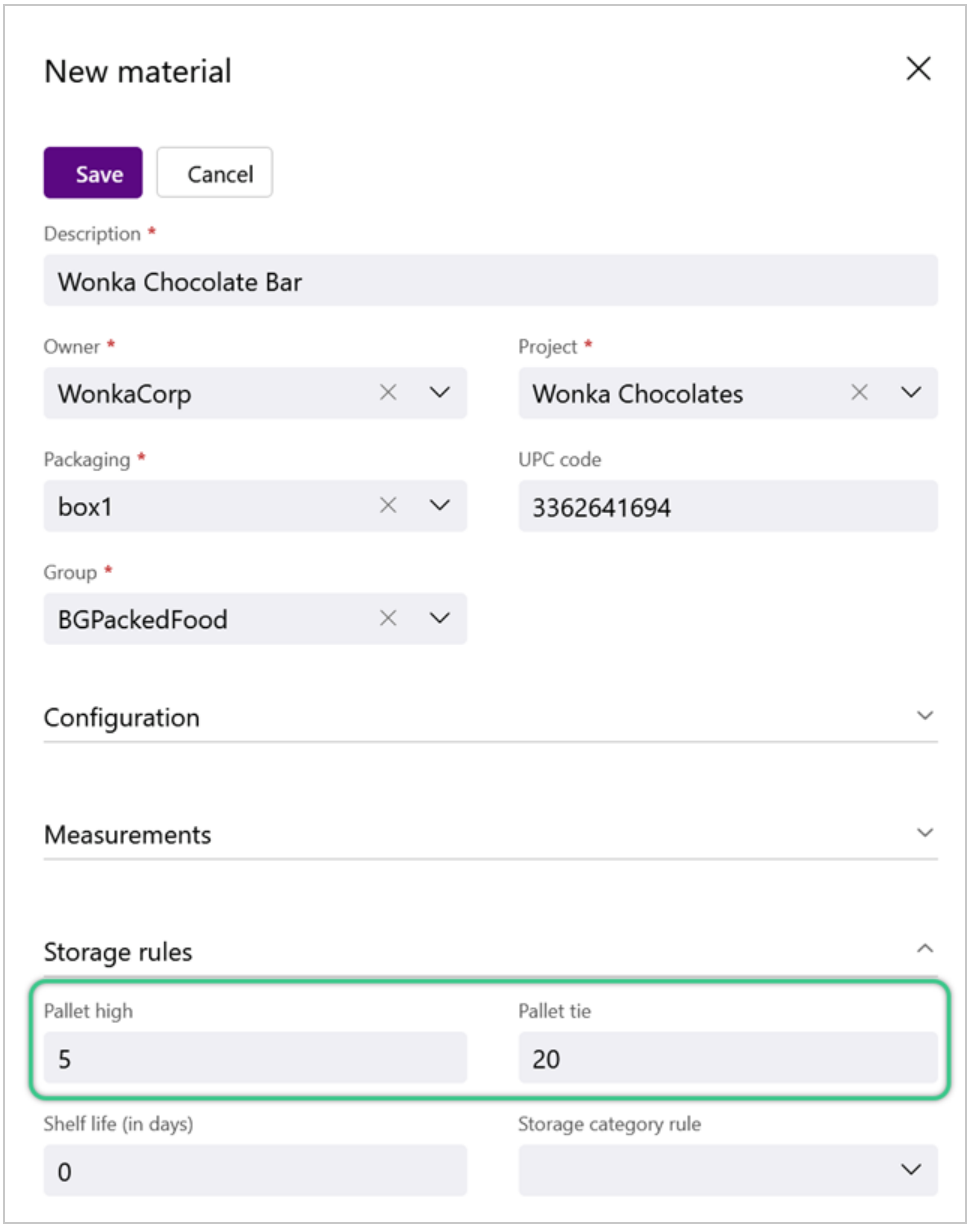


Step 6. Set Material Storage Rules

When possible, specify the material's optional **Storage Rules**, as these settings contribute to a more accurate **Suggested Putaway** and calculating **Expiration Dates**.

1. Enter the **Pallet High** and **Pallet Tie**.

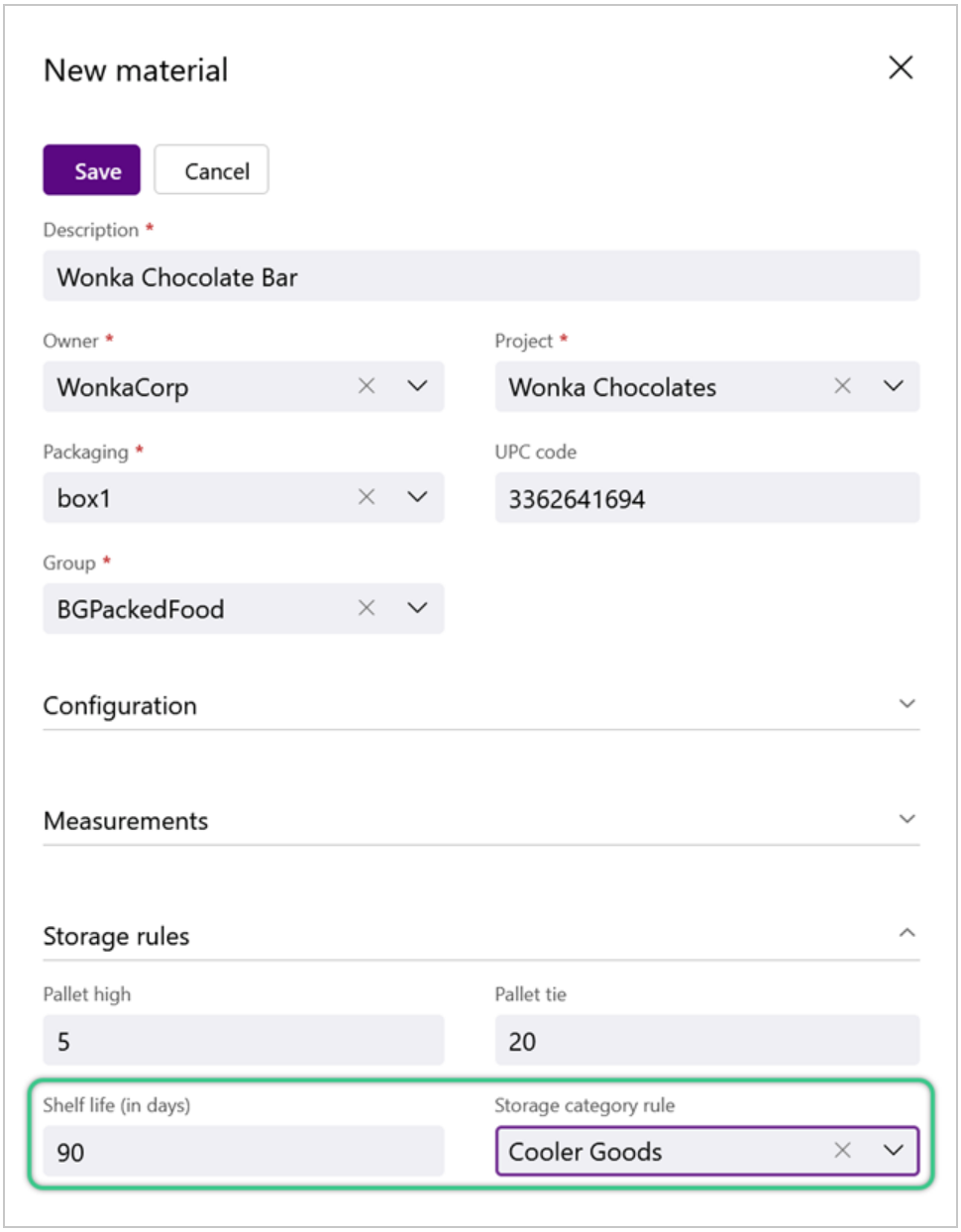
Pallet High is how many units high the Package can be stacked atop itself, while the **Pallet Tie** is how many units to set down before stacking.



2. Enter the material's **Shelf Life** and select a **Storage Category Rule**.

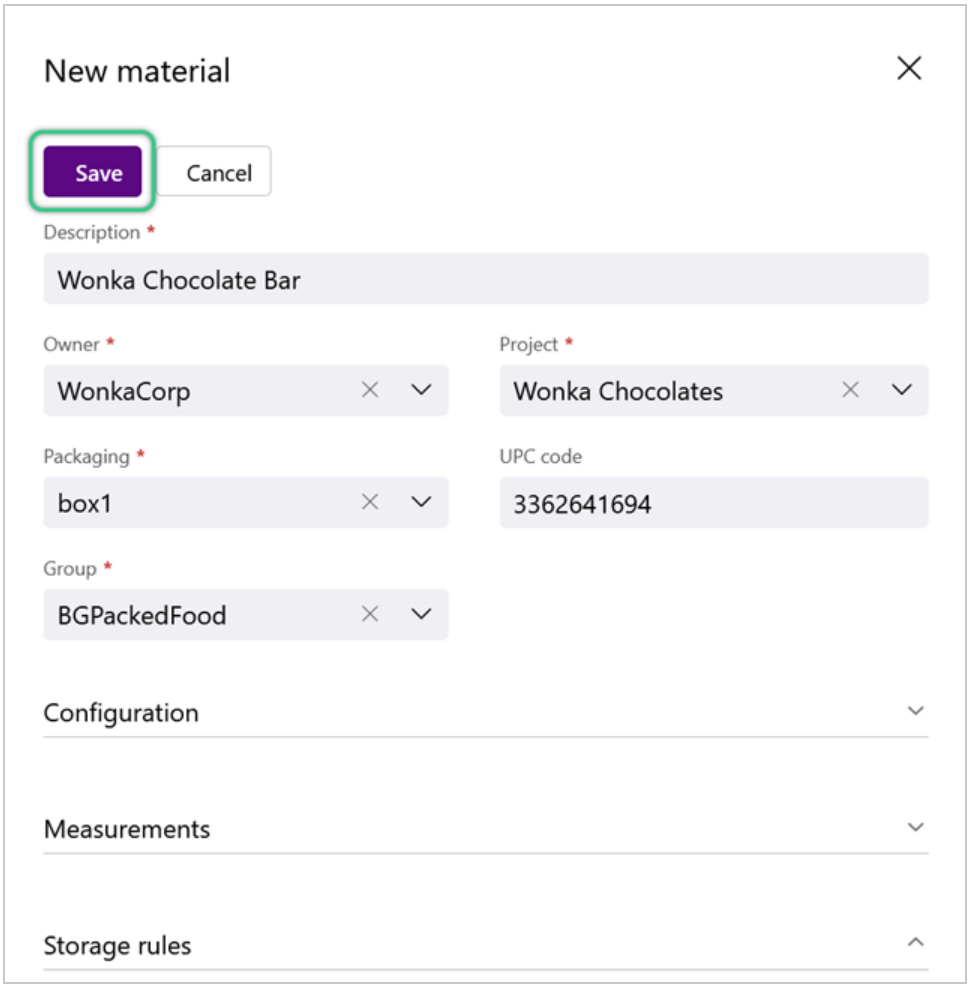
Tip

Storage Category is the new field introduced in Footprint to capture **Temperature Categories**, in addition to other storage category types.



Step 7. Save the New Material

1. Click the purple **Create** button in the top left corner of the **New Material** window.



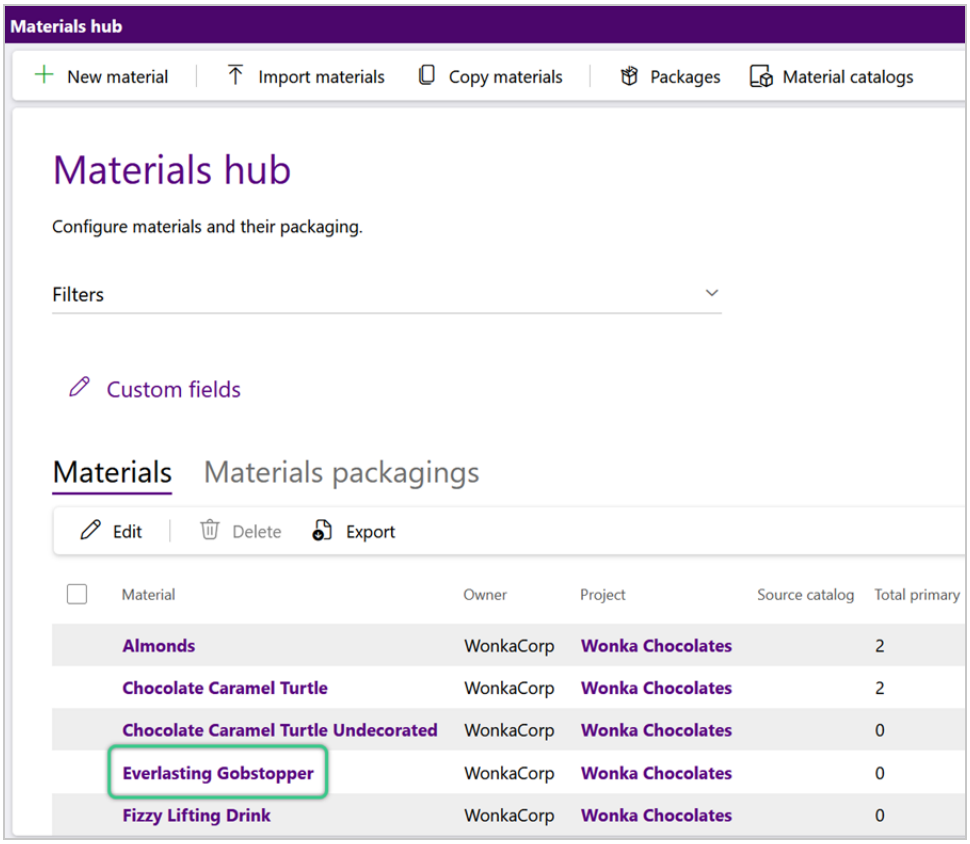
Once a Material has been created, there are many more options that can be configured for the Material in the Warehouse. For more on how to fully configure a new Material, please visit our **Set Up a Material** article.

The new material is now available for further setup. For comprehensive setup options, please visit the **Setup a Material** tutorial.

Step 2. Open the Material Record

After a Material is created, there are more details that can be setup for it.

1. Click the **Name** in the Materials Hub to open the Material record for further setup.



Step 3. Edit More Configuration, Storage, and Manufacturing Options

There are additional **Configuration** and **Manufacturing** setup options only available in a Material's **Edit Material** window. For complete descriptions of these additional fields, please refer to the Materials Guide.

❑Note

Much of the information and rules set here cannot be changed while you have any units of this Material in your Warehouse. Once all of a Material's Inventory has been removed, then edits can once again be made.

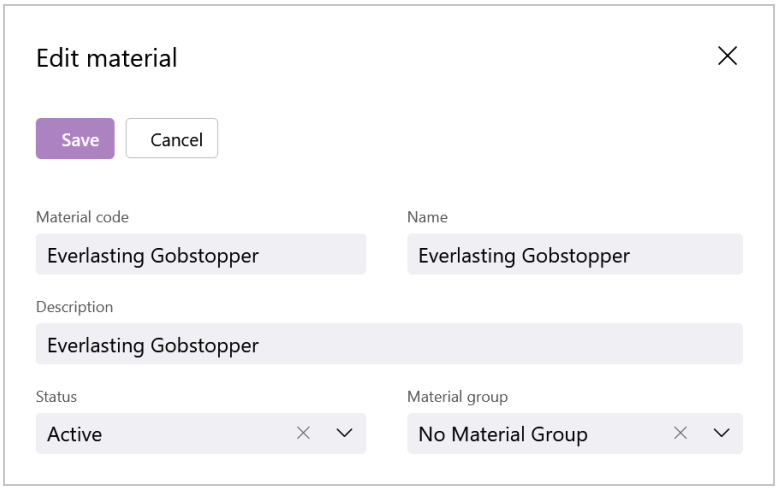
Step 1. Open the Material Edit Window

1. Click **Edit** in the top Material record toolbar.



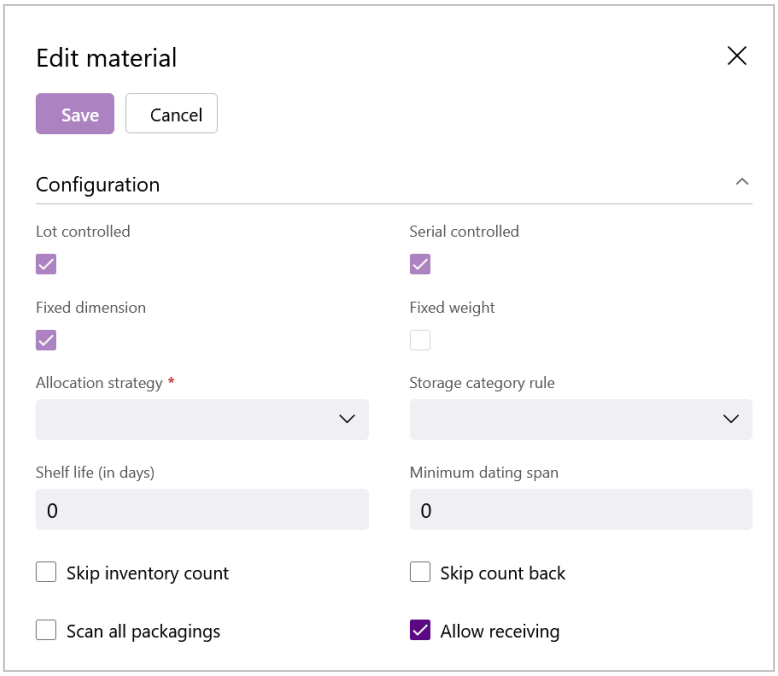
Step 2. Edit Material Basics

1. Update any of the following basic details:
    - Material Code
    - Name
    - Description
    - Status
    - Group



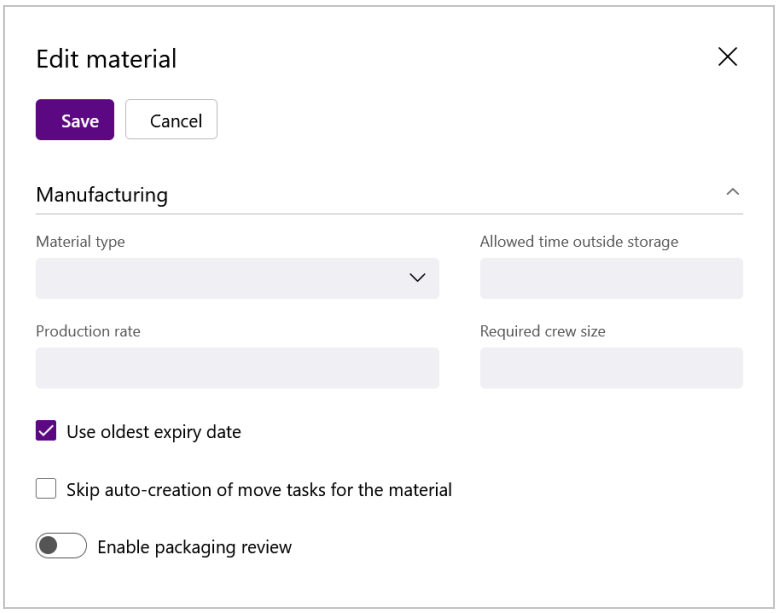
Step 3. Edit Configuration Details

1. Update any of the following **Configuration** details:
    - Lot Controlled
    - Serial Controlled
    - Fixed Weight
    - Allocation Strategy
    - Storage Category Rule
    - Shelf Life
    - Minimum Dating Span
    - Skip Inventory Count
    - Skip Count Back
    - Scan All Packagings
    - Allow Receiving



Step 4. (Optional) Edit Manufacturing Settings

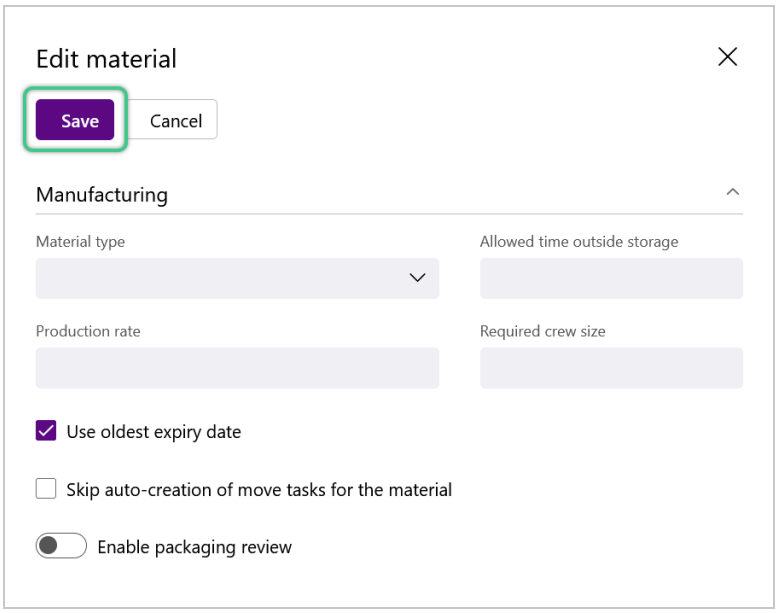
1. Update any of the following **Manufacturing** settings:
    - Material Type
    - Allowed Time Outside Storage
    - Production Rate
    - Required Crew Size
    - Use Oldest Expiry Date
    - Skip Auto-Creation of Move Tasks
    - Enable Packaging Review
    - Set Packaging Review Reminder
    - Review New Packaging Type After (in Days)



Step 5. Save the updated Material

1. Click **Save** in the top left corner of the Edit Material window.

The Material is now ready for use as Inventory.



Step 4. Select Packagings

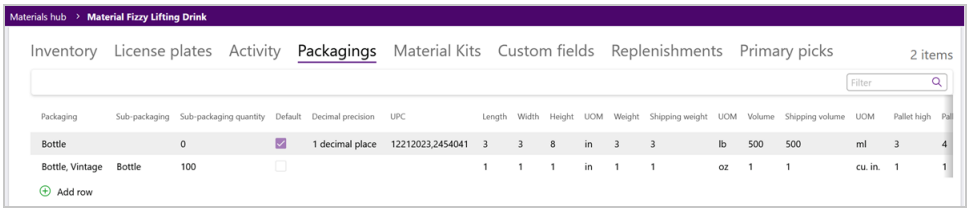
Now that we've entered the basics, let's move on to the **Packagings** tab, where we will select our Packaging. Add as many levels of Packaging as are needed.

❑Note

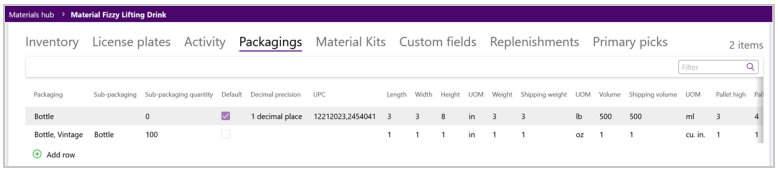
A Material must have at least one Package level - the Base Package.

Step 1. Add Base Packaging

1. Click the **Packagings** tab.

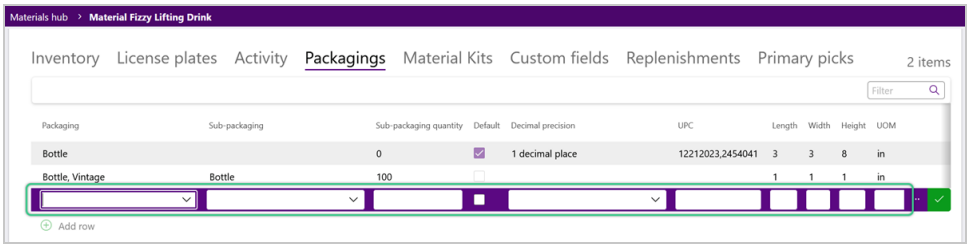


2. Click the green **+ Add Row** option in the bottom left corner of the tab.

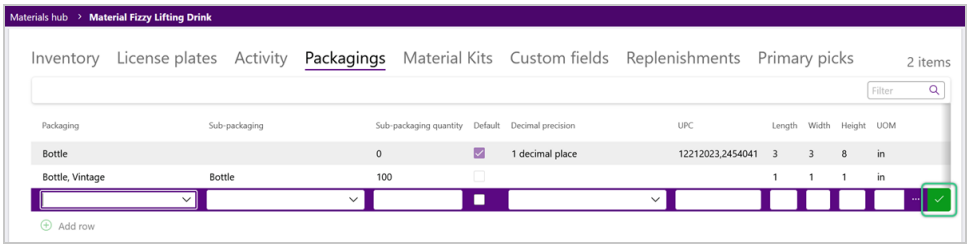


3. Enter the Base Packaging details.

For more information about these Packaging Details, please visit the **Materials Guide**.



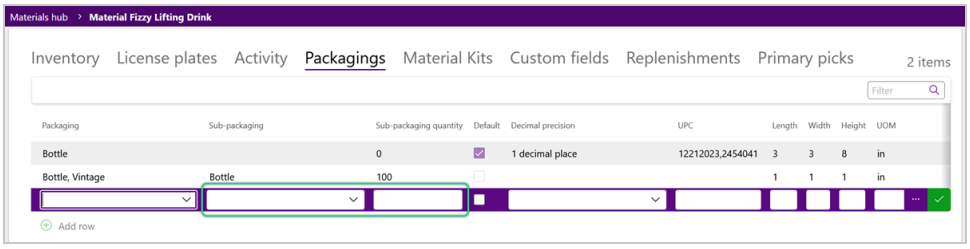
4. Click the green check mark at the end of the row to Save the Base Packaging.



Step 2. (Optional) Add Sub-Packaging

1. Repeat the steps for as many levels of Packaging as are needed for the Material, being sure to select the correct sub-packaging from the **Sub-Packaging** field.

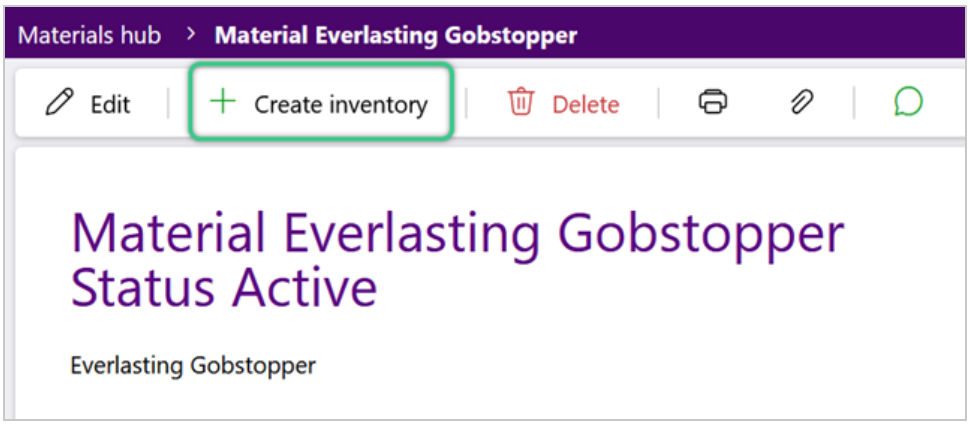
2. In the **Sub-Package Quantity** field, enter the number of smaller Packages it takes to fill the Base Packaging level.



Step 5. Create Inventory

Step 1. Open the Material Inventory Window

1. Click the **+ Create Inventory** option in the top toolbar.



Step 2. Enter Inventory Details

2. In the **Create Inventory** window, select the required **Owner** and an affiliated **Project**, if they are not already set.

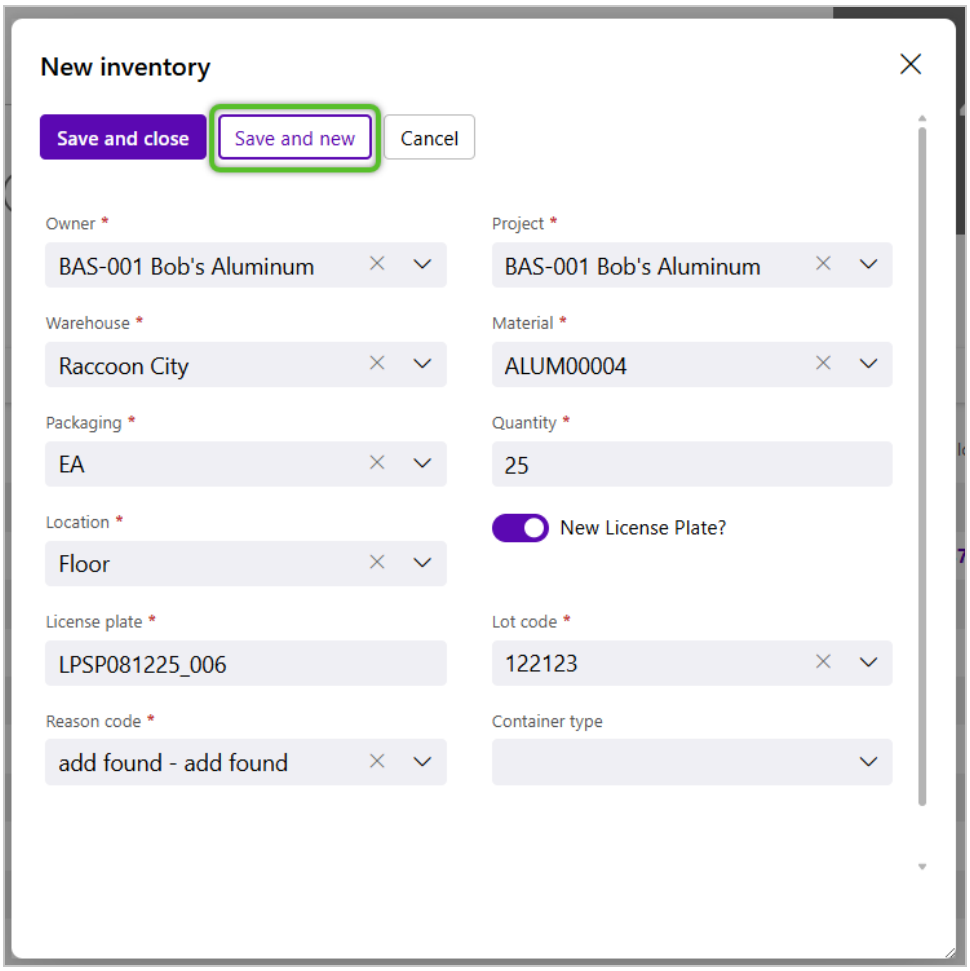
3. Select a required **Warehouse**, then tab to select the Inventory **Material** to be added, if they are not already set.

4. Select the required **Packaging** and enter the **Quantity** of the Inventory.

5. Select a **Location** and use the toggle indicating whether or not the new Inventory will require a **New License Plate**.

6. Enter or select a **License Plate** number for the new Inventory, then select a **Reason Code** for adding the new Inventory to the warehouse.

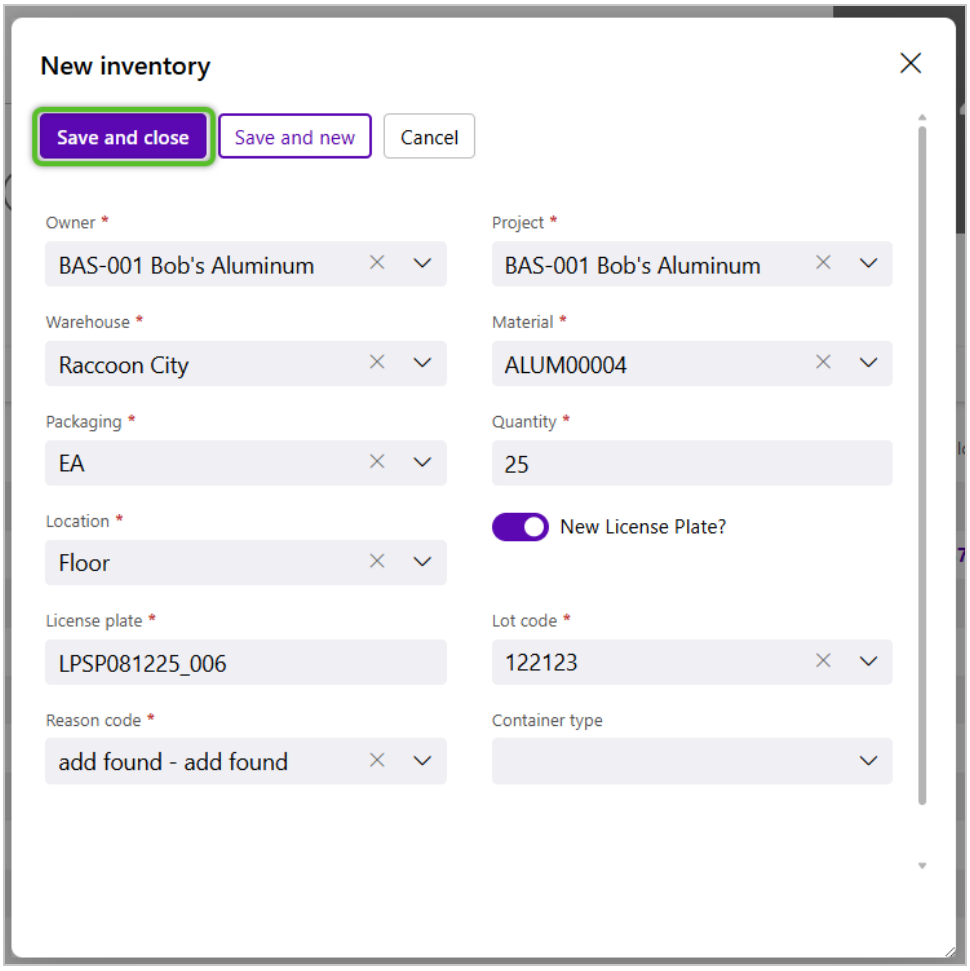
7. To continue adding new Inventory to the Warehouse, click the **Confirm and New** button in the top of the **Create Inventory** window.



Step 3. Save the New Inventory

8. Once all Inventory information has been set, if no more Inventory needs to be added, click the **Confirm and Close** button in the top left corner of the **Create Inventory** window.

The new Inventory will now be available for use in the specified warehouse.



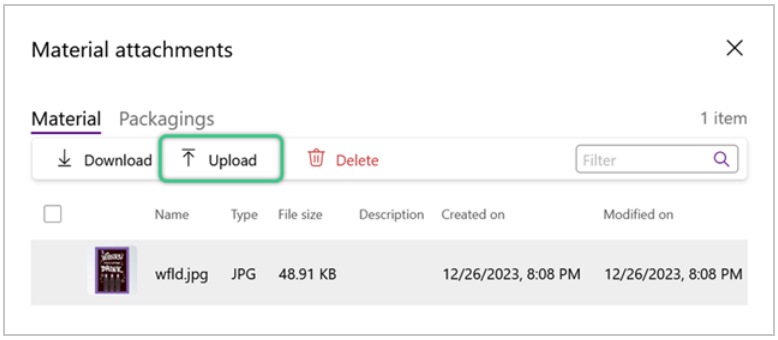
Step 6. (Optional) Add Attachments, Images

The **Material Attachments** window allows users to view and upload file, including images, to correspond with a Material or its Packaging. Images files added here are used throughout the rest of Footprint to assist users in visually identifying the inventory in the warehouse.

1. Click the **Attachments** icon in the top toolbar.

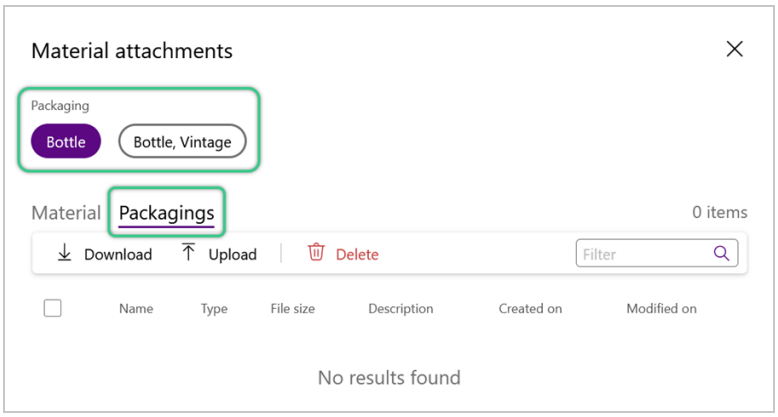


2. In the Material Attachments window, if the attachment is for a Material, click the **Upload** option on the **Material** tab.



3. Click the **Packaging** tab, then select the correct **Packaging Type**(when multiple exist) before uploading a Packaging file.

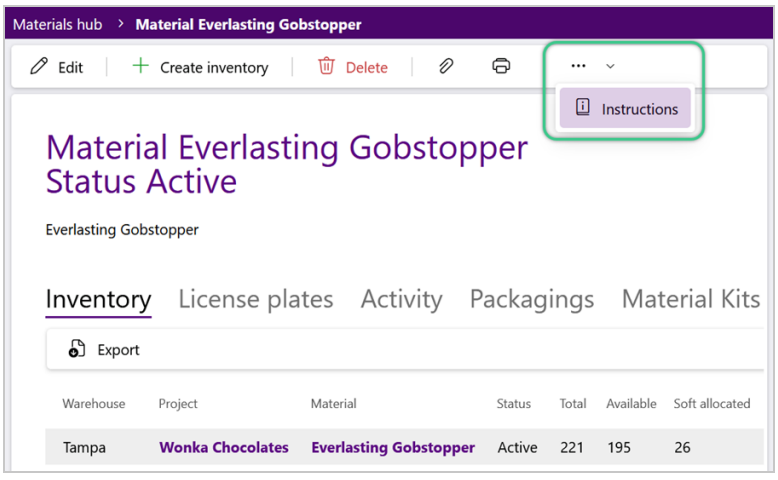
This assists in picking and packing when it may be confusing to a user whether an item is an each, case, pack, bundle, etc.



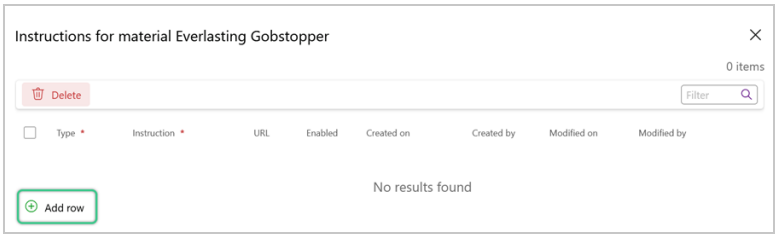
Step 7. (Optional) Set up Instructions

Material Instructions can be setup to display for users working with the Material on specific pages in Footprint.

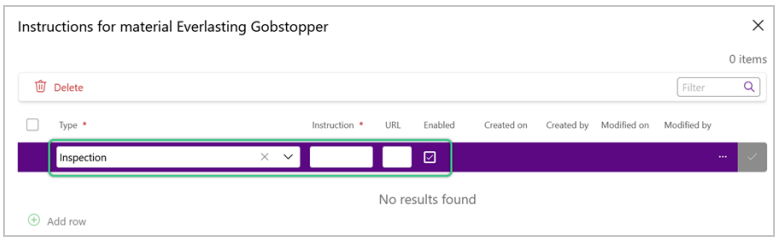
1. Click the Options dropdown icon in the Material Record toolbar and select **Instructions**.



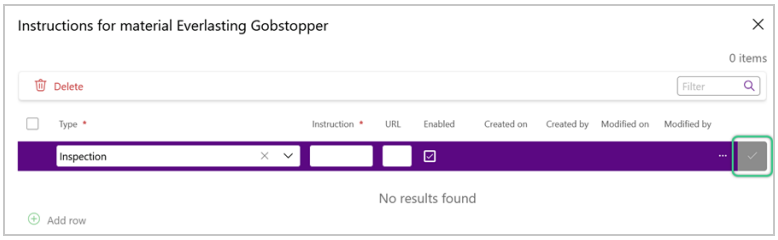
2. Click the green **+ Add Row** option in the bottom left corner of the Material Instructions window.



3. Select the **Type** of Instruction, enter the **Instruction** text, the **URL** where the Instruction should be displayed, and check the Enabled box.



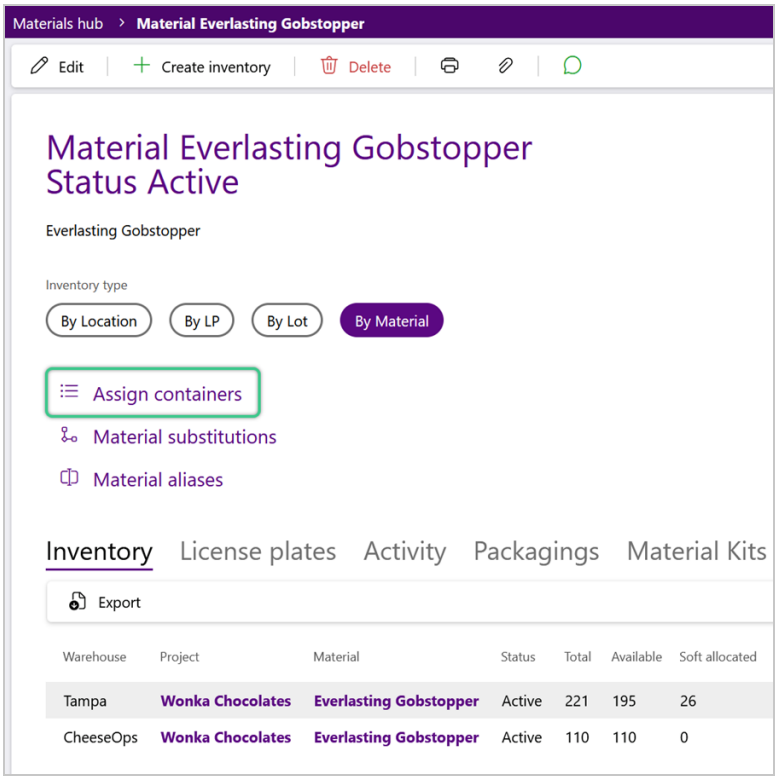
4. Click the green check mark at the end of the row to Save the Material Instruction.



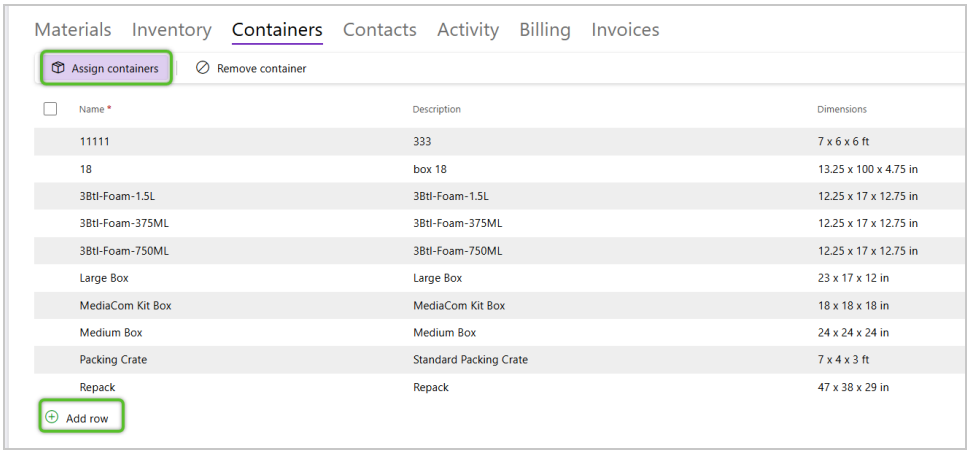
To delete a selected Instruction for a Material, click the **Delete** button.

Step 8. (Optional) Assign Containers

1. Click the **Assign Containers** option.



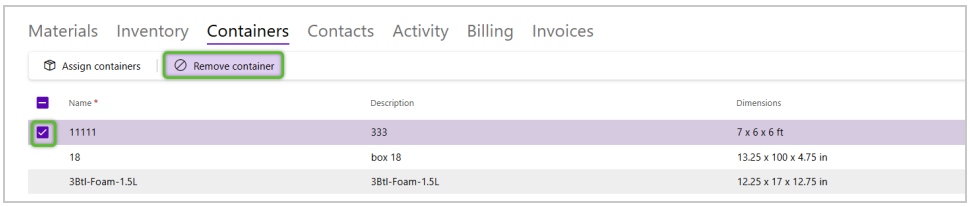
2. In the **Container** tab, click the **Assign Containers** button to open and select a Container, or click the green **+ Add Row** option to create a new one.



The container will now appear on the list of containers assigned.

3. Repeat the process to assign as many Containers as needed.

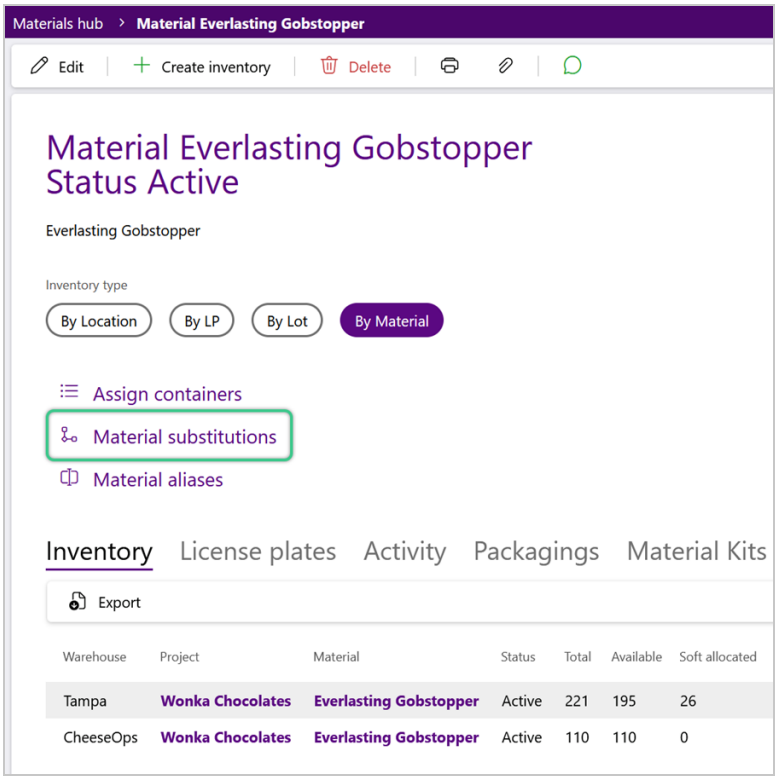
To remove a Container, check the box for the Container row, then click the **Remove Container** option.



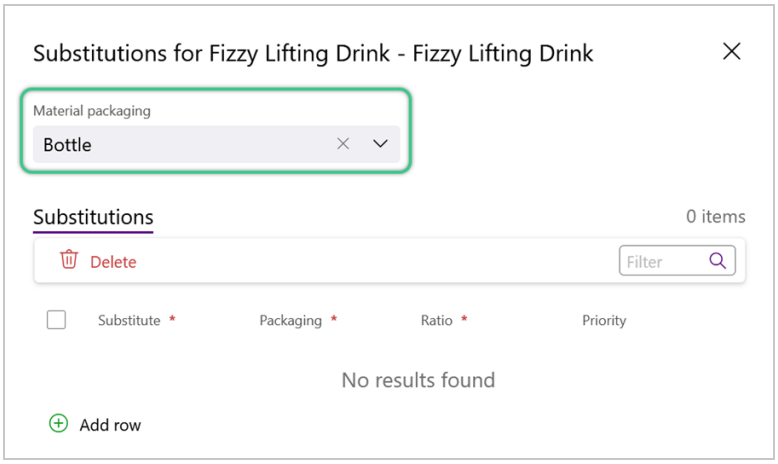
Step 9. (Optional) Setup Substitutions

Material Substitutions allow the set up of additional Materials which could be used to replace the current Material (the Material being edited) when it is not available. These substitute Materials can be leveraged through custom Outbound Order Processing Workflows, to make decisions on Material Substitutions based on Inventory levels.

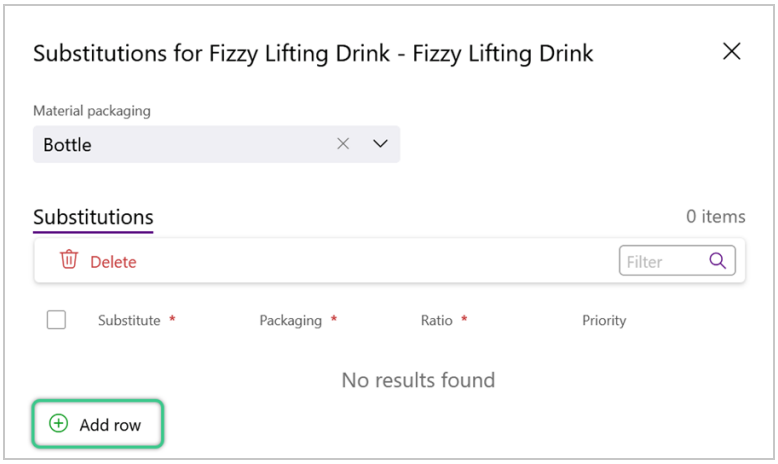
1. Click the **Material Substitutions** option.



2. Before adding Material Substitutes, first select the **Material Packaging** of the current Material to be replaced by the substitute when needed.



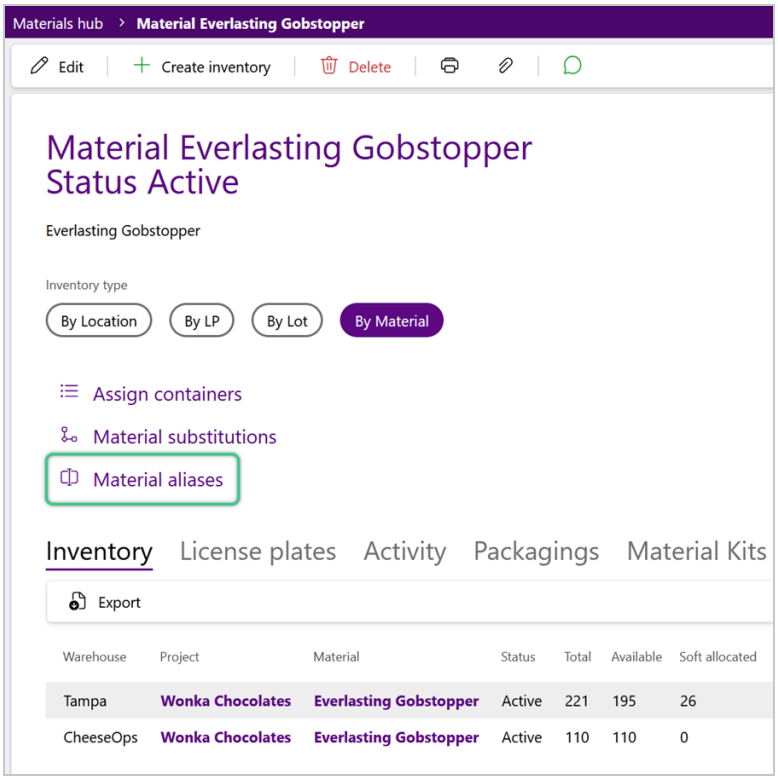
3. Click the green **+ Add Row** option to add a new Material Substitution.



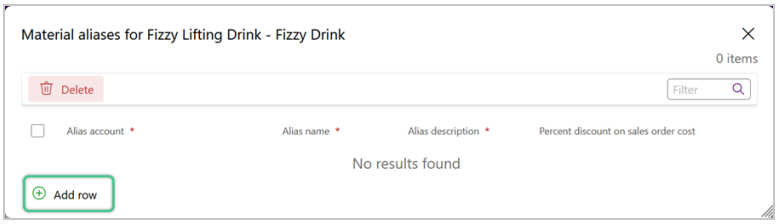
Step 10. (Optional) Add Aliases

Material Aliases allows different customers to see a different Material Name when the Material is displayed in Reports and Workflows. There is also the option to reduce the sales order cost of the Material by a specified percentage for each customer account.

1. Click the **Material Aliases** option.



2. Click the green **+ Add Row** option to add a new Material Alias for a client Account.



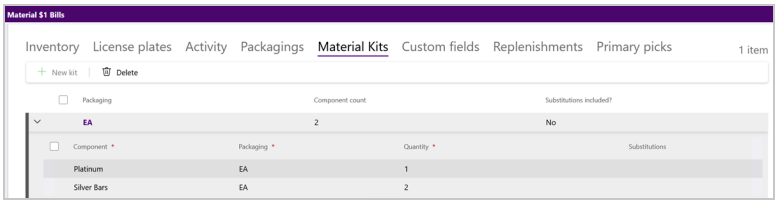
Step 11. (Optional) Create a Kit

Kits are groupings of Materials into one new Material. Kits can be used for **Manufacturing**, which will automatically determine required quantities based on the Kit Components.

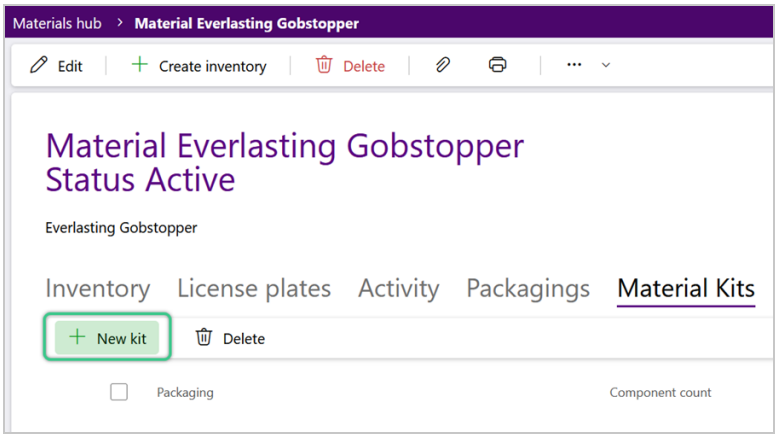
Example

A **Table** Material Kit may be composed of four **Table Leg** Materials and one **Table Surface** Material.

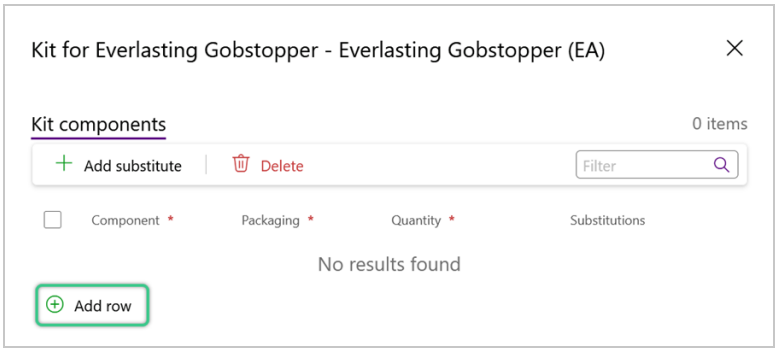
1. Click the **Material Kits** tab.



2. Click the green **+ New Kit** button in the tab toolbar.

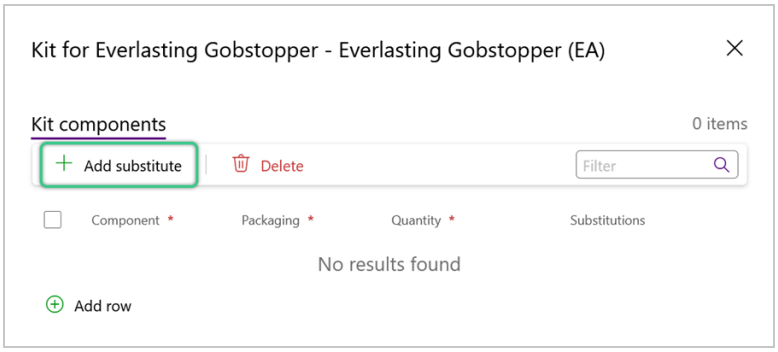


3. Click the green **+ Add Row** option in the bottom left of the Material Kit window to add a Kit Component Material. For more details on Material Kits and Components, please visit the **Materials Guide**.



4. Click the green **+ Add Substitute** button to add a Material Component substitute, when needed.

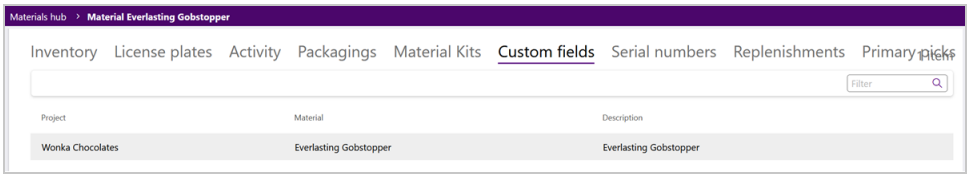
Repeat the steps for all Materials required to complete the Kit.



Step 12. (Optional) Enter Custom Field Details

Any Custom Fields you have setup for Materials can be entered in the **Custom Fields** tab.

1. Click the **Custom Fields** tab.
2. Enter the requested details for each of the custom fields.

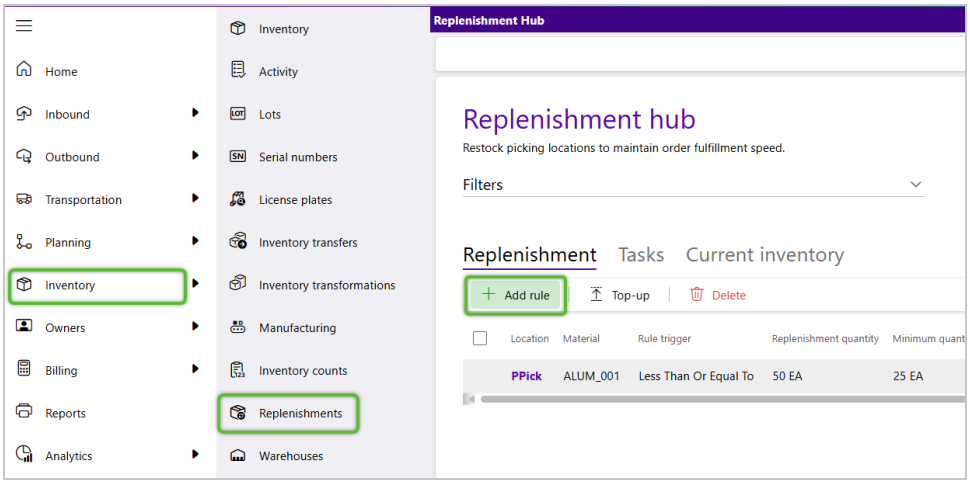


Step 13. (Optional) Add Replenishment Rules

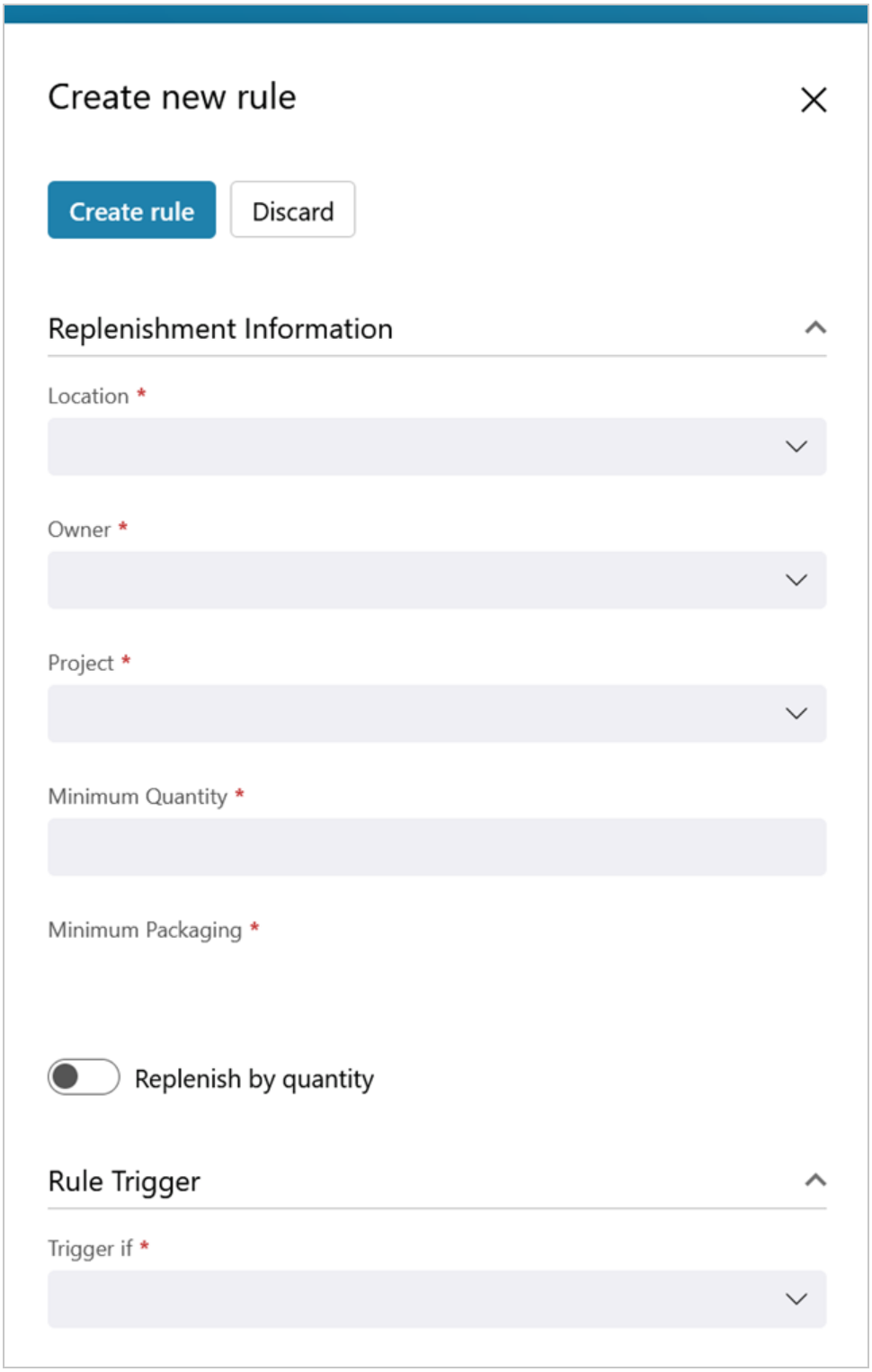
Replenishments are assigned at the Location level under the **Replenishment** tab.

Step 1. Open the Replenishment Rule Window

1. Click **+ Add Rule** in the Material's **Replenishment** tab toolbar.

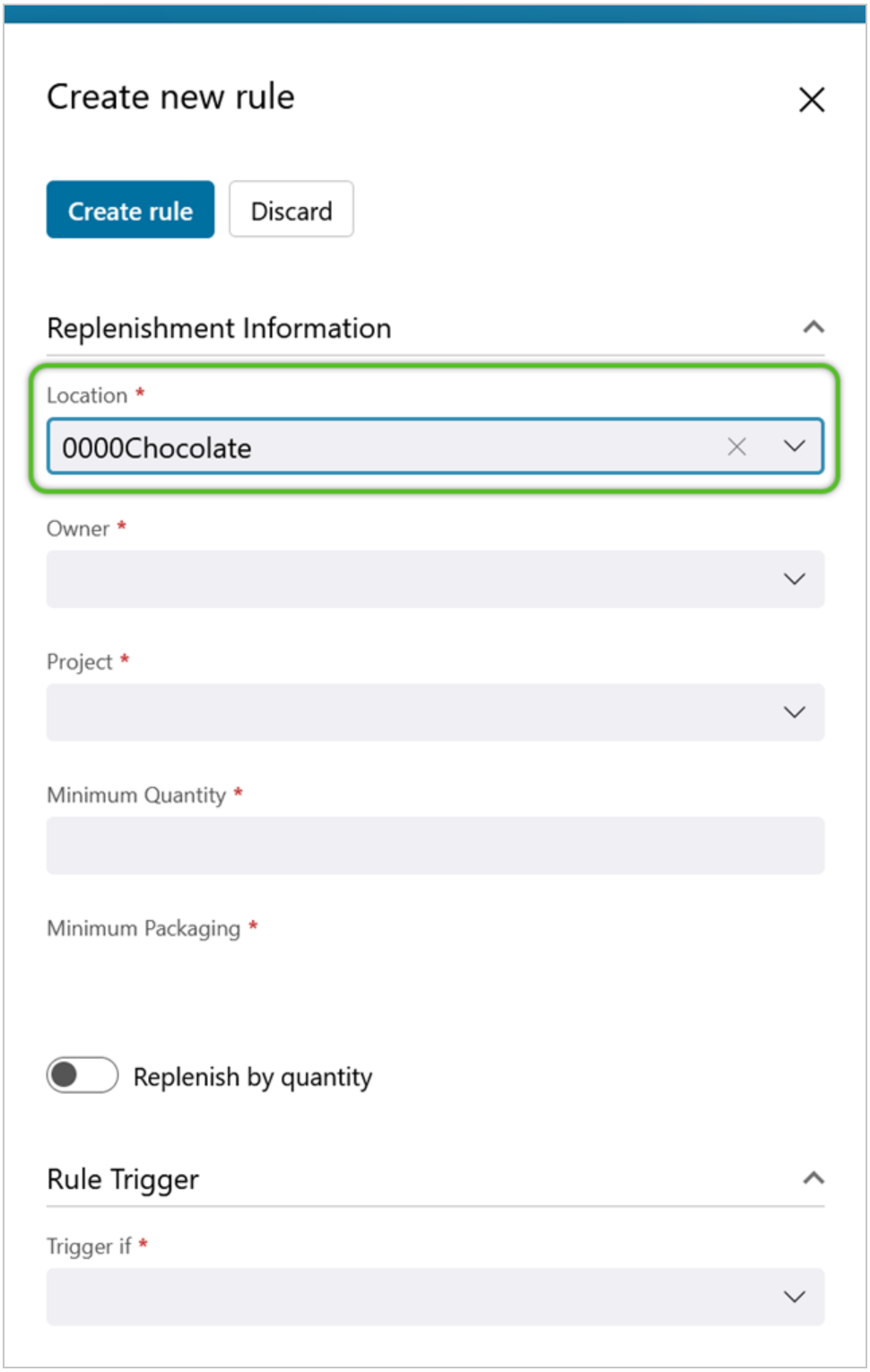


The **Create New Rule** window will display along the right side of the page.



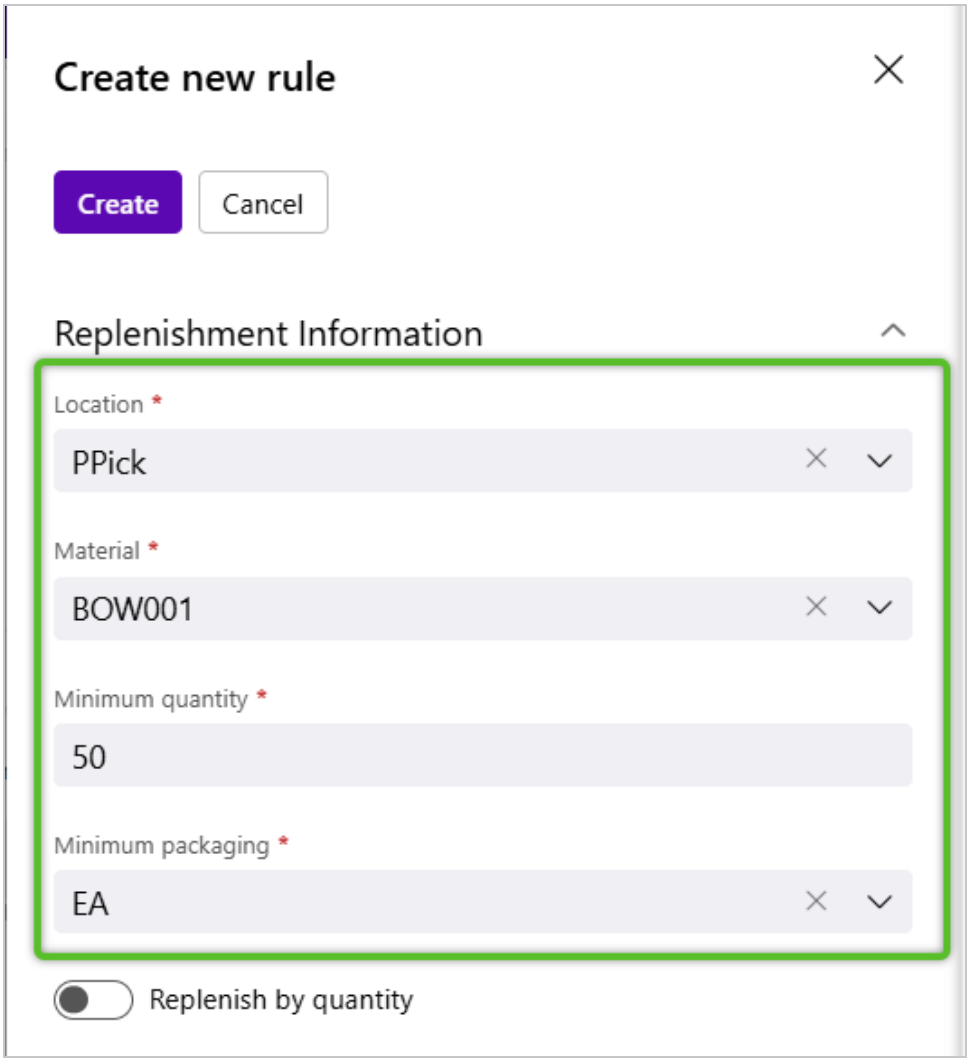
Step 2. Enter the Replenishment Details

1. In the **Replenishment Information** section, select the required **Location**.

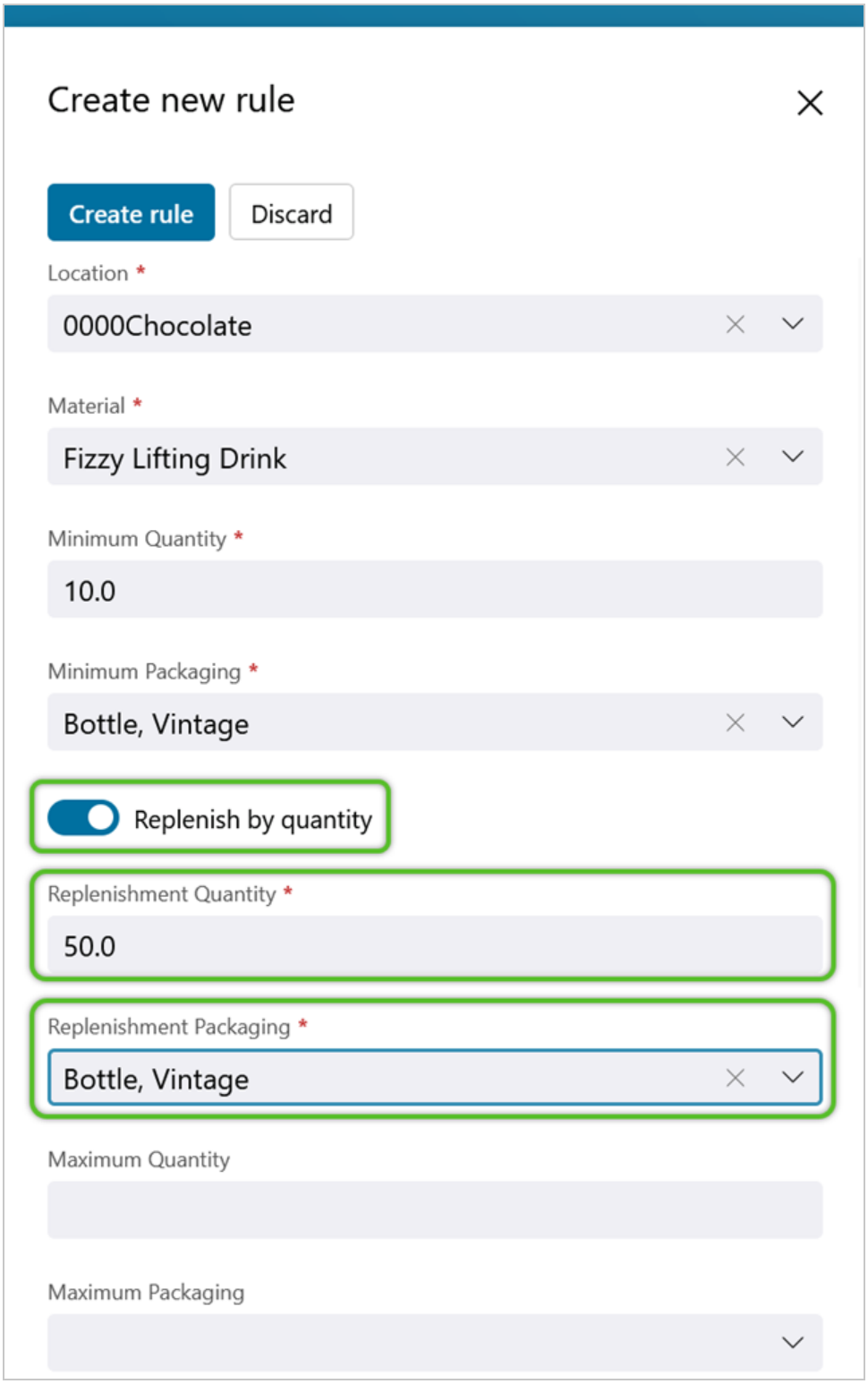


2. Select the required **Minimum Quantity** and **Minimum Packaging** to trigger the replenishment.

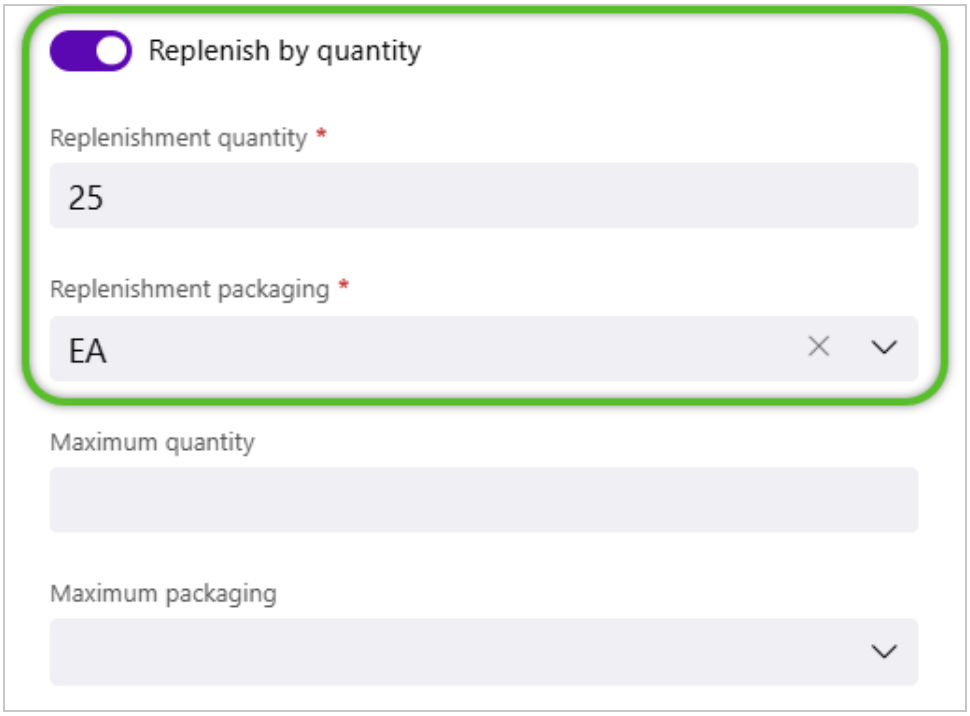
These determine the minimum amount of the Materials and Material Packagings available in the Location before requiring replenishment.



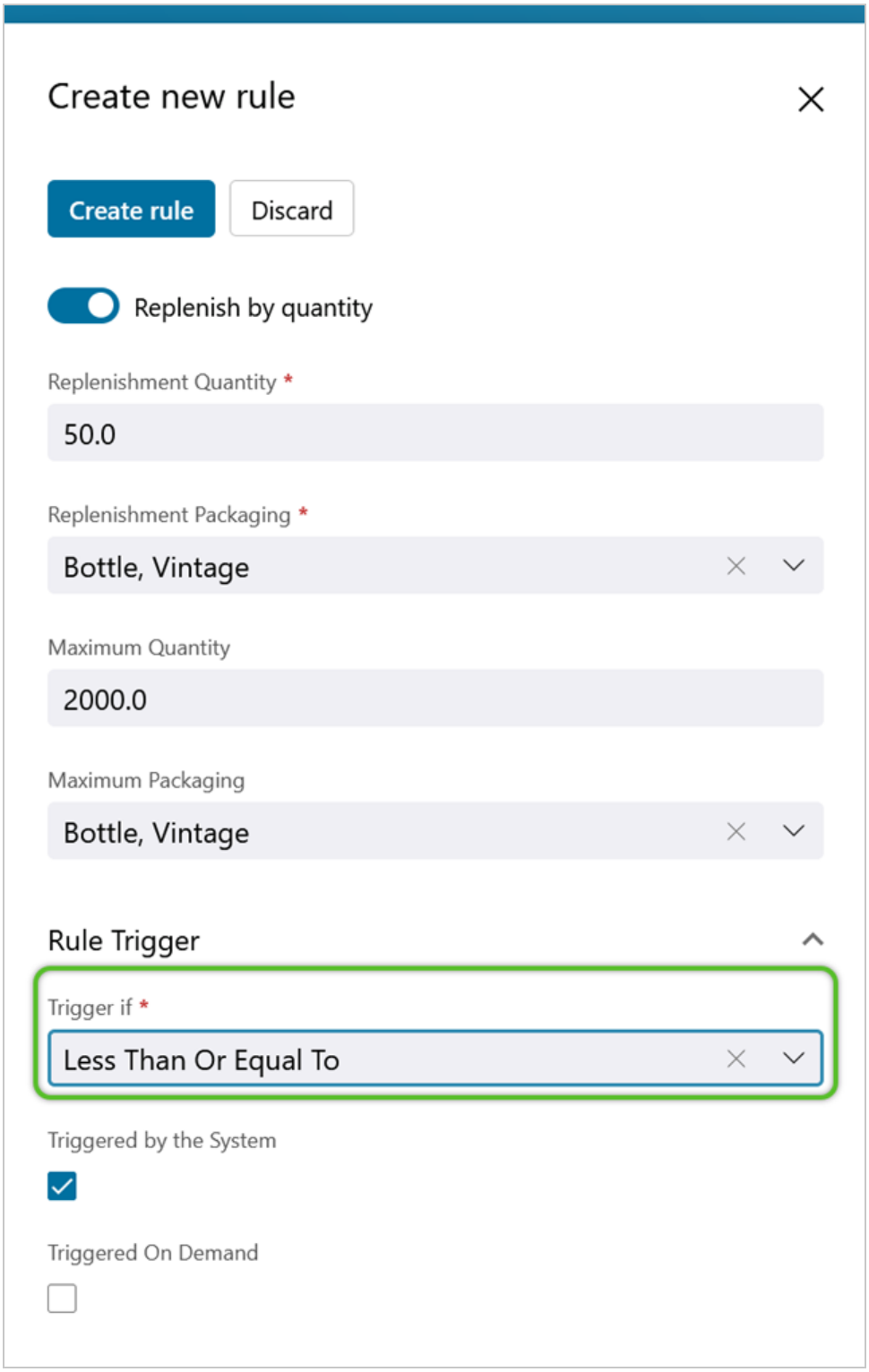
3. To **Replenish by Quantity**, click the toggle to enter the required **Replenishment Quantity** and **Replenishment Packaging**.



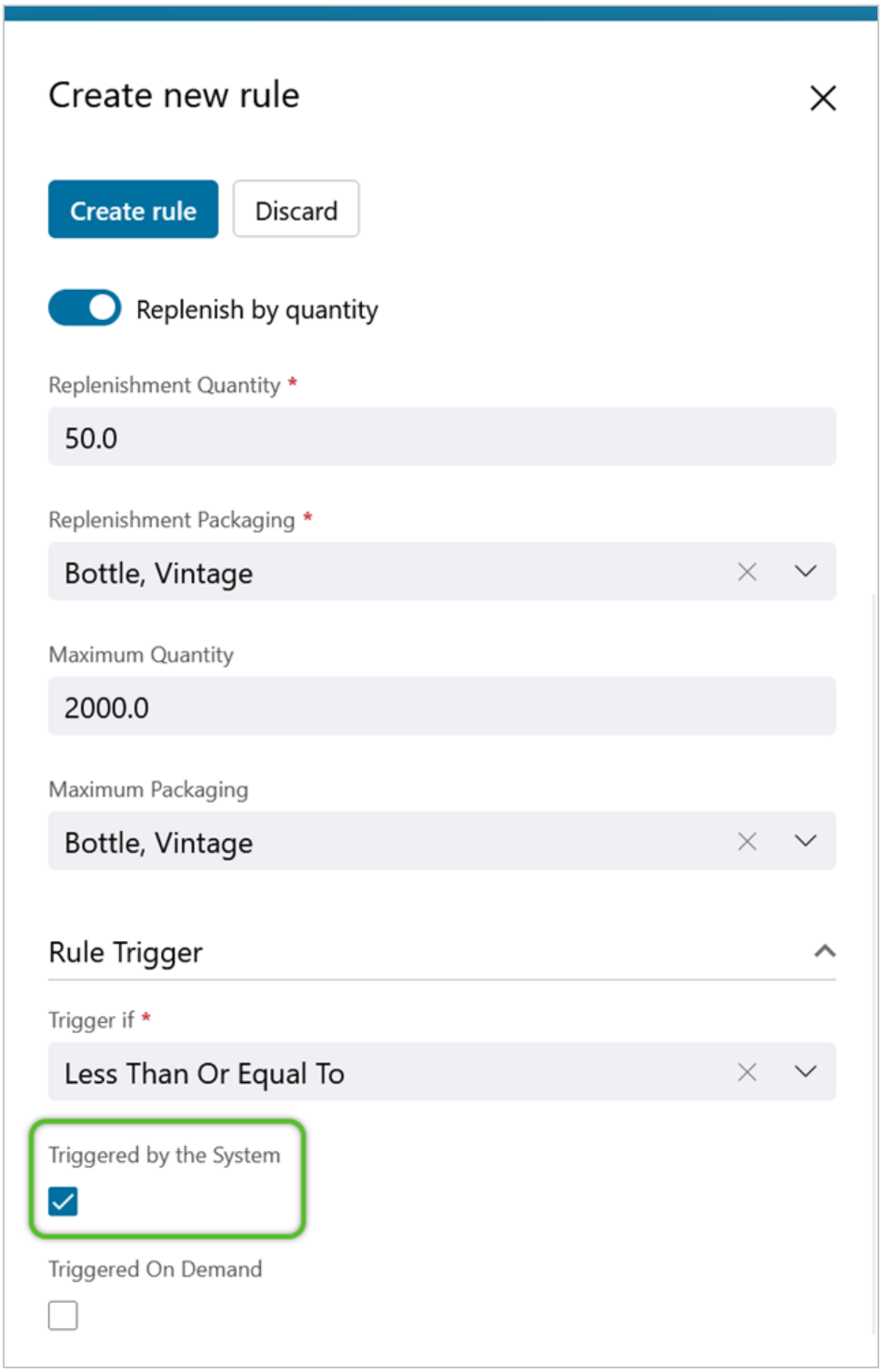
4. If necessary, set a **Maximum Quantity** and **Maximum Packaging**.



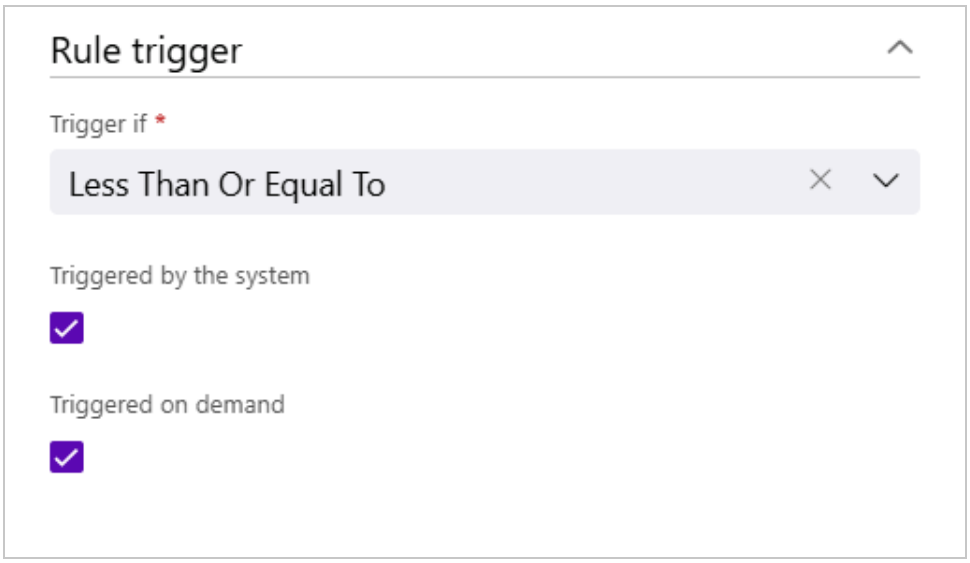
5. In the **Rule Trigger** section, select a required **Trigger If** option from the drop down.



The **Triggered by the System** box is checked by default.



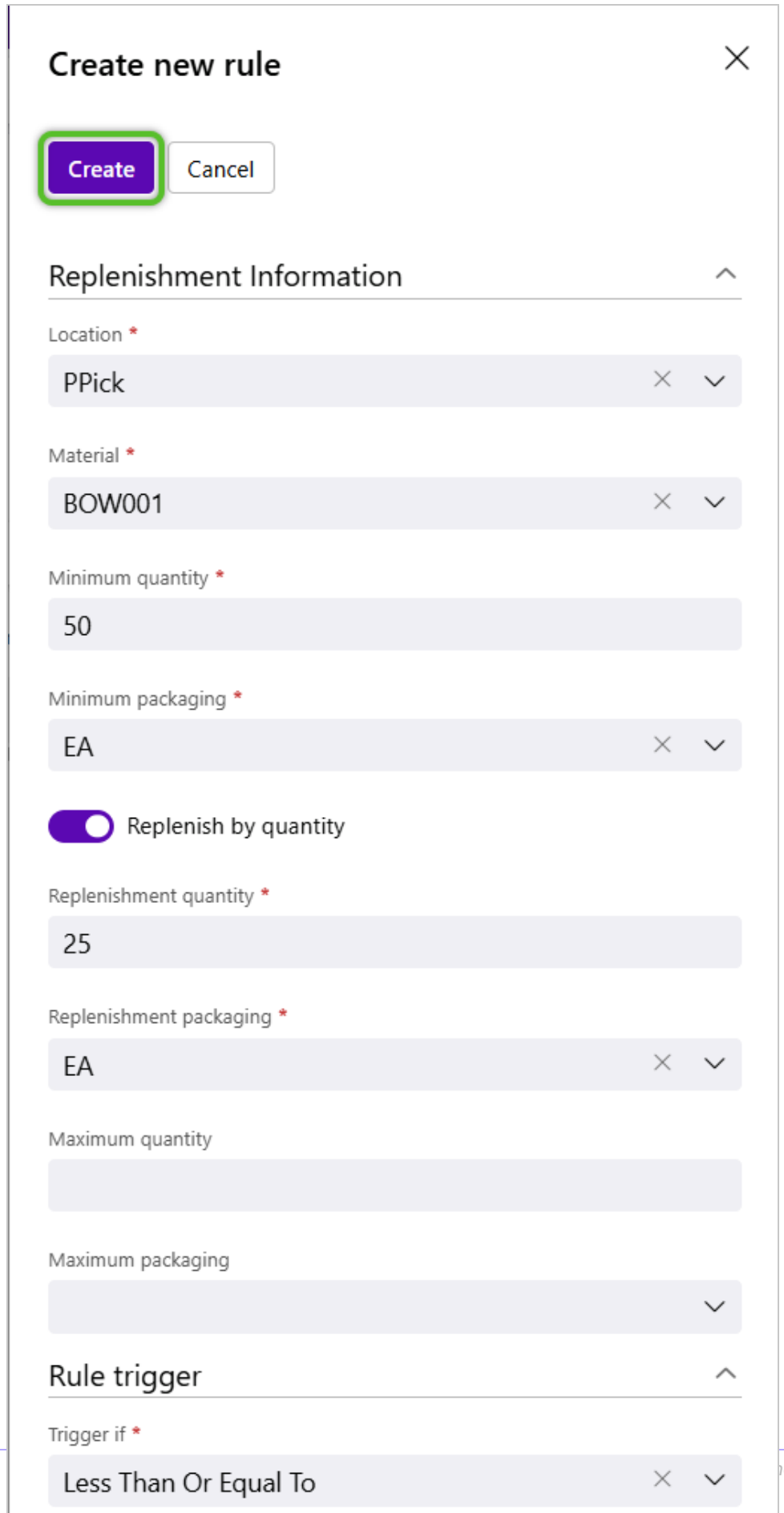
6. When necessary, check the box to allow the **Replenishment to be Triggered On Demand**.



Step 3. Save the Replenishment Rule

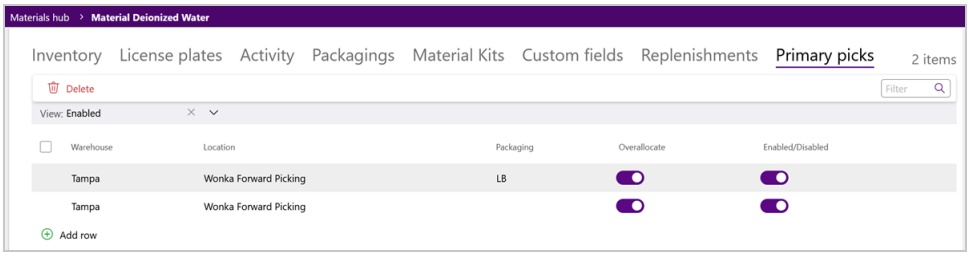
1. Once the details for the new Replenishment Rule have been set, click the blue **Create Rule** button at the top of the window.

The new Replenishment Rule will go into effect immediately.

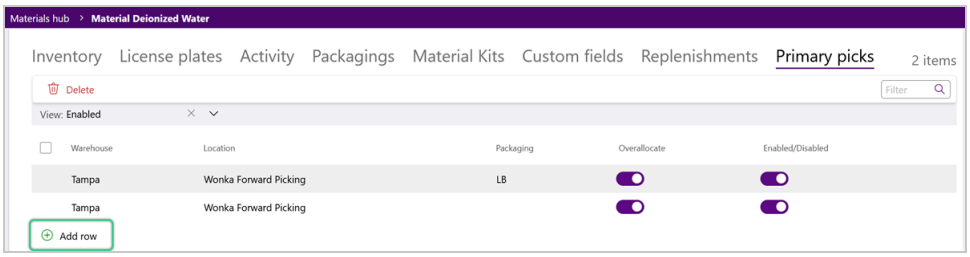

Create new rule
Create
Cancel
Replenishment Information
Location *
PPick
Material *
BOW001
Minimum quantity *
50
Minimum packaging *
EA
Replenish by quantity
Replenishment quantity *
25
Replenishment packaging *
EA
Maximum quantity
Maximum packaging
Rule trigger
Trigger if *
Less Than Or Equal To

Step 14. (Optional) Set Primary Pick Locations

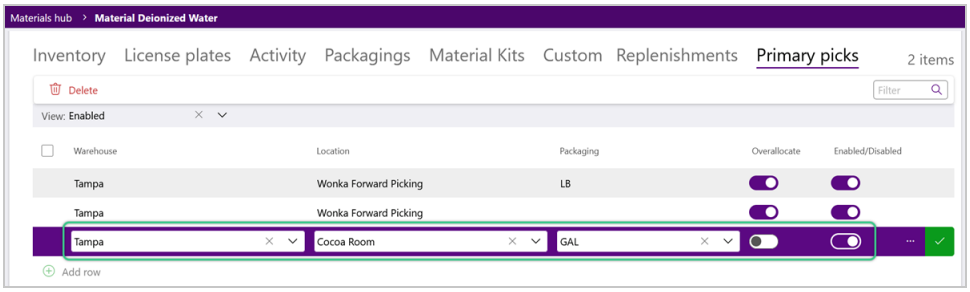
1. Click the **Primary Picks** tab to view and manage the Material's Primary Pick Locations.



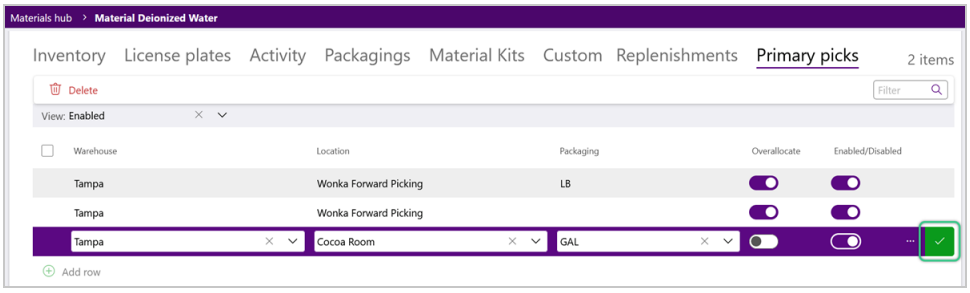
2. Click the green **+ Add Row** option in the bottom left of the tab.



3. Enter the **Warehouse**, **Location**, and **Packaging**, and set the **Overallocate** and **Enabled/Disabled** toggles as needed.



4. Click the green check mark to Save the Primary Pick Location.



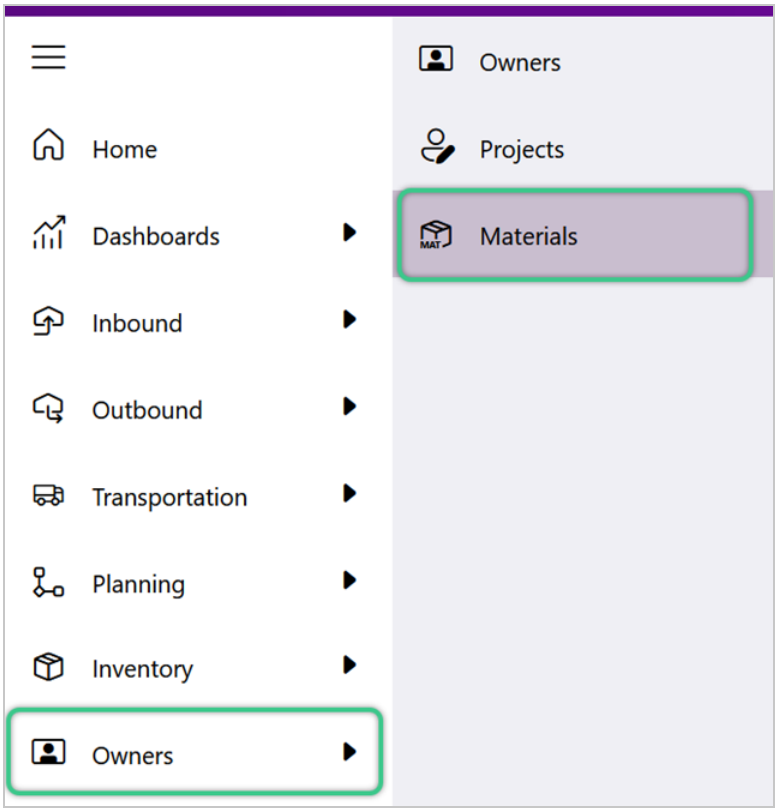
Create a Packaging

Packaging describes how materials are stored, including the material's physical specifications (weight and dimensions).

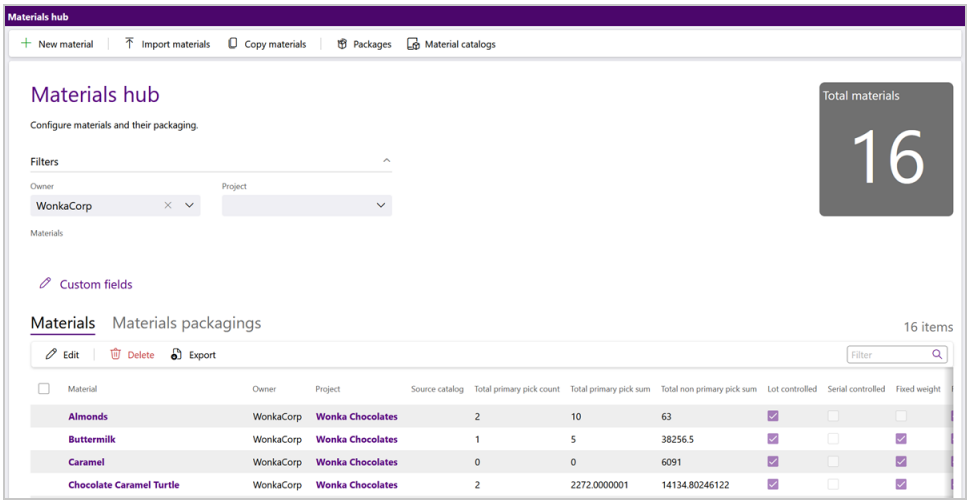
Multiple Packaging levels can exist for a single material, between which conversions can be made. For example, a Cola material can be set up with a Can and a Case Packaging, where the Case is equal to 12 Cans as its sub-packaging.

Step 1. Open the Materials Hub

1. Click **Owners** in the left navigation menu and select **Materials**.

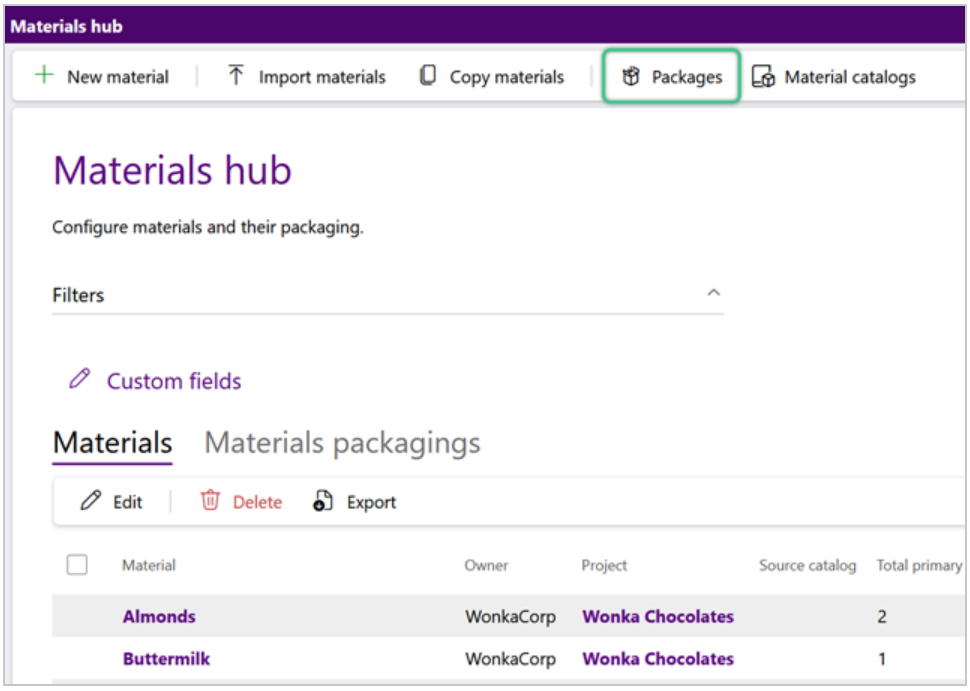


The **Materials Hub** will display.

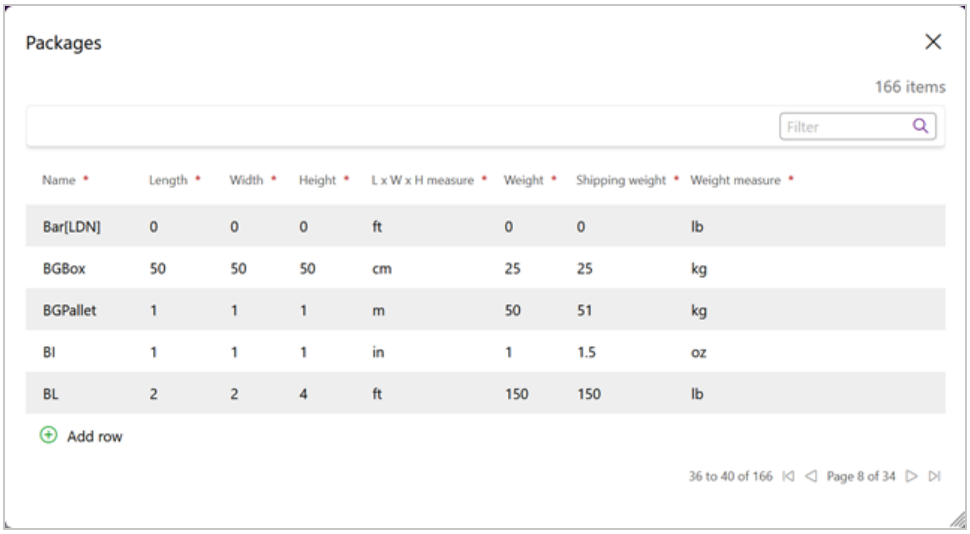


Step 2. Create the New Packaging

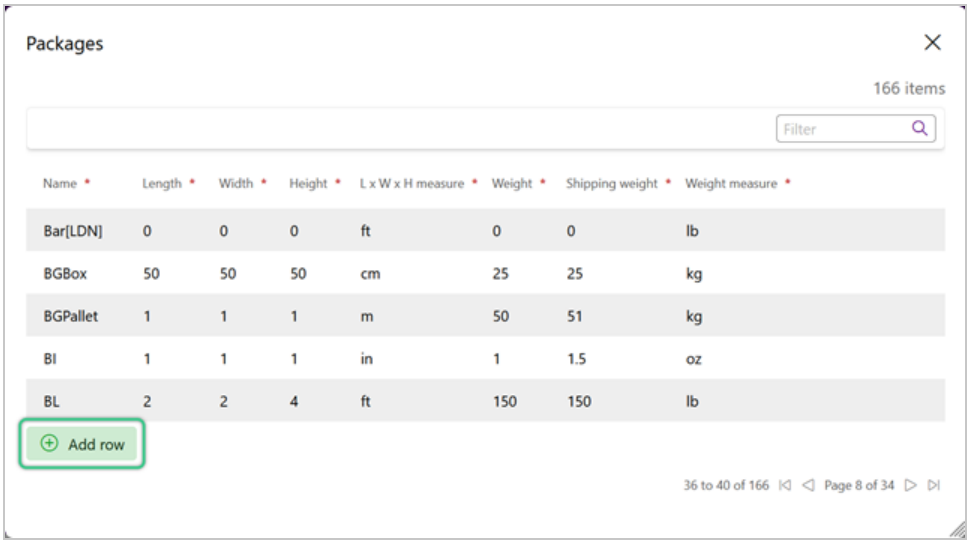
1. Click **Packages** in the top menu.



The **Packages** window will display.



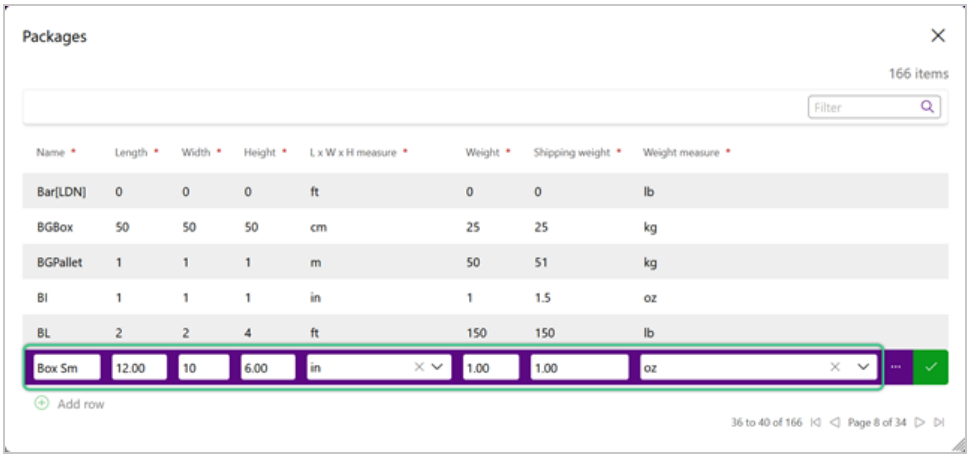
2. Click the green **+ Add Row** button in the bottom left corner.



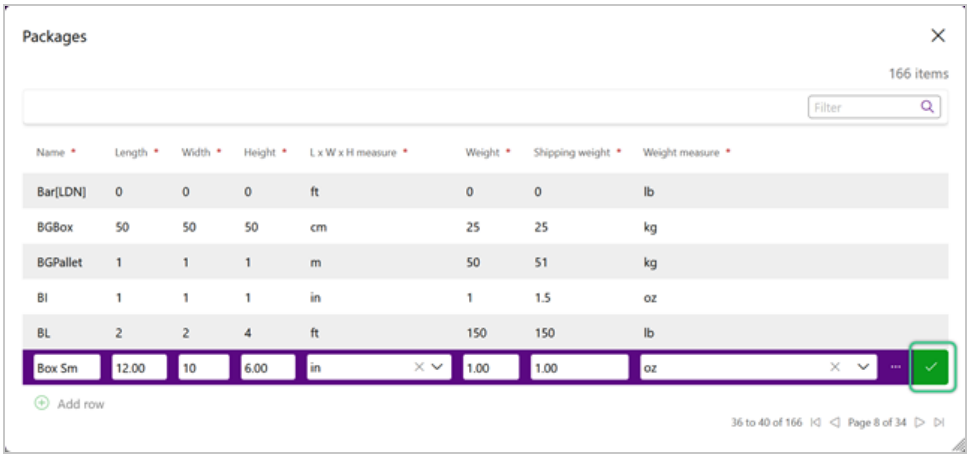
3. Enter a required **Name** to reference the new packaging, then enter the following physical specifications: **Length**, **Width**, **Height**, **L x W x H Measure**, **Weight**, **Shipping Weight**, and **Weight Measure**.

Tip

These packaging measurements are used for Cartonization.



4. Click the green check mark in the right column to save the new packaging, making it immediately available for use.



Import Materials

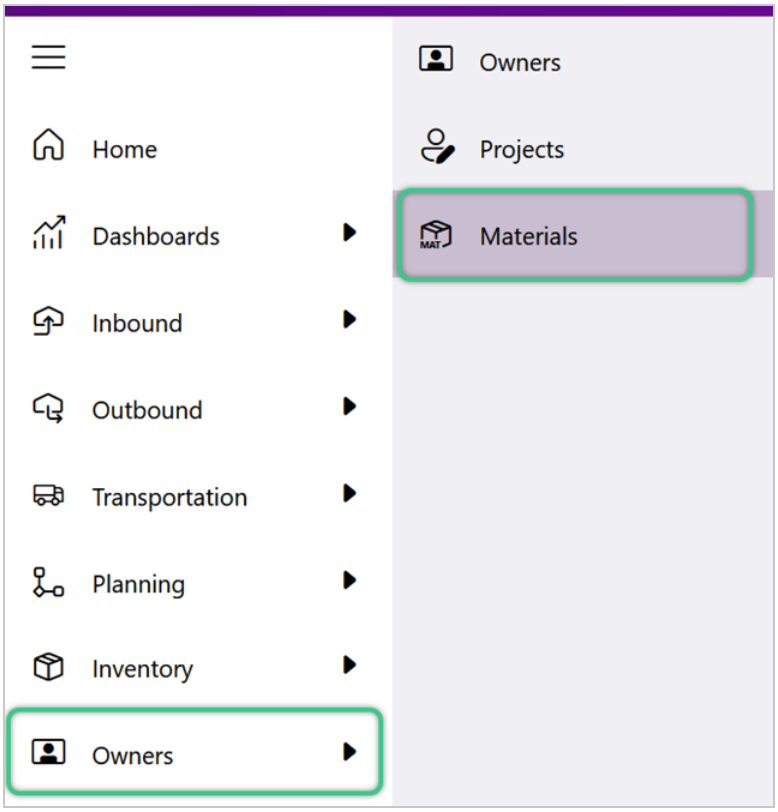
Imported Materials will appear alongside other **Materials** for review and management. Only one level of Packaging for a Material can be created during the import process. For Materials with multiple packaging levels, first import the base packaging (commonly Each). Additional Packaging levels can be added manually, or using the **Material Packagings import** template.

Please Note

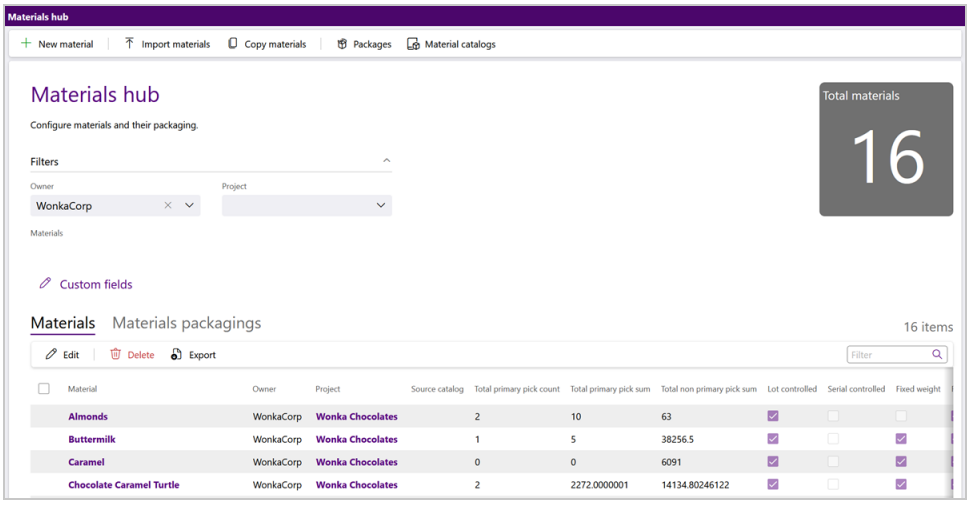
- For the most comprehensive import, we recommend downloading the latest export file with up-to-date features and fields.
- The import process is intended for creating new records. Enter as many details as possible when importing, as attempting to update existing records will result in an error.
- All 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.

Step 1. Open the Materials Hub

1. Click **Owners** in the left navigation menu and select **Materials**.

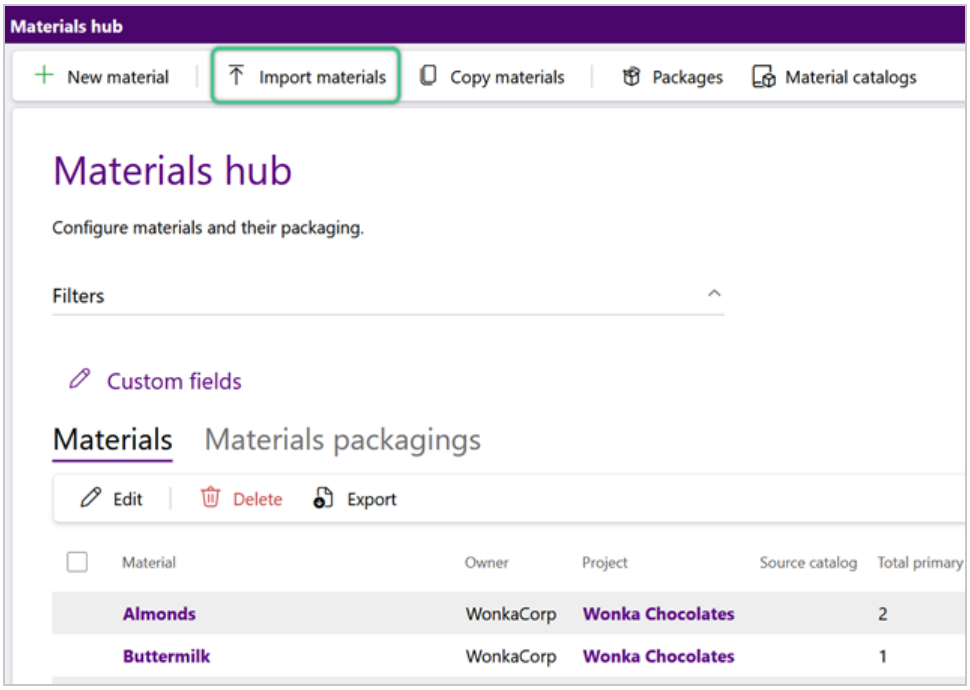


The **Materials Hub** will display.

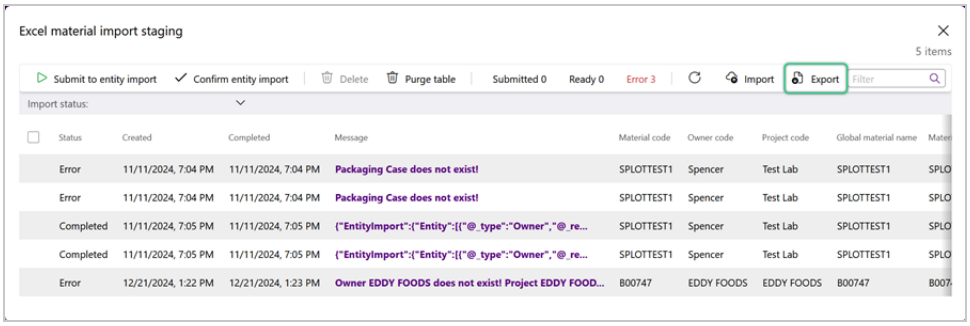


Step 2. Download the Materials Template File

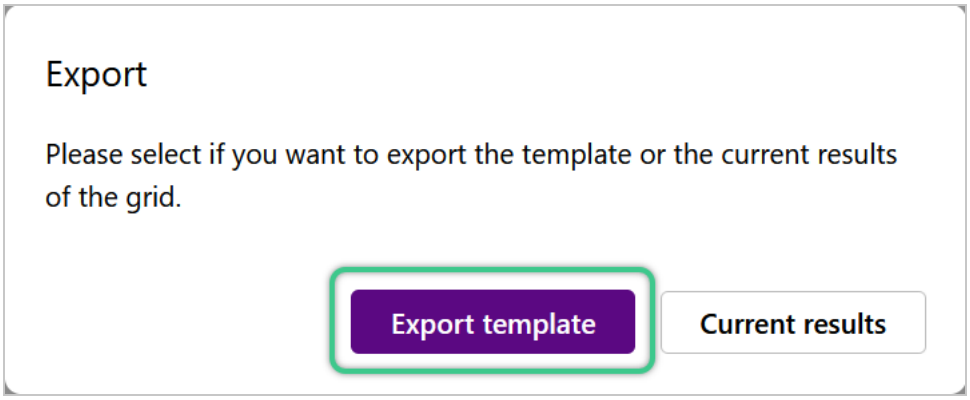
1. Click **Import Materials** in the top menu.



2. Click **Export** in the top right of the **Excel Material Import Staging** window.



3. Click the purple **Export Template** button to begin the file download to the specified workstation location.



Step 3. Complete the Materials Template File

Note

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

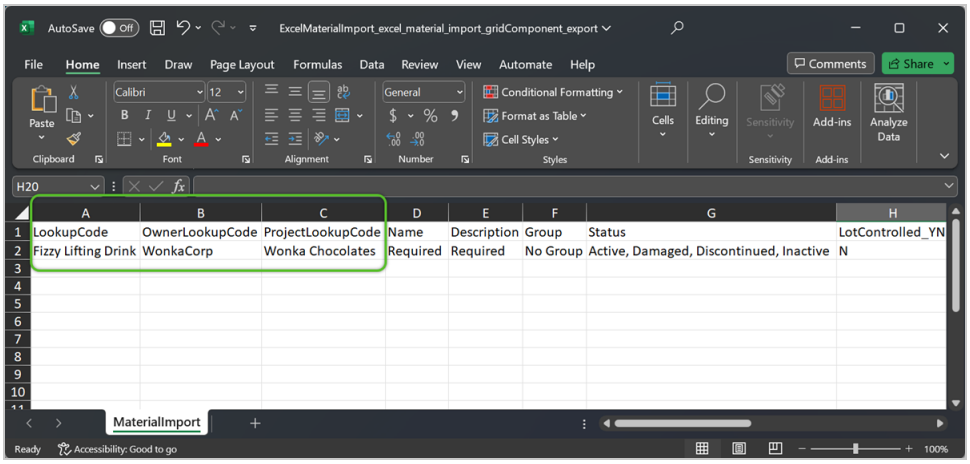
1. Locate the file named '**ExcelMaterialImport_excel_material_import_gridComponent_export**' and double click on it to open it.



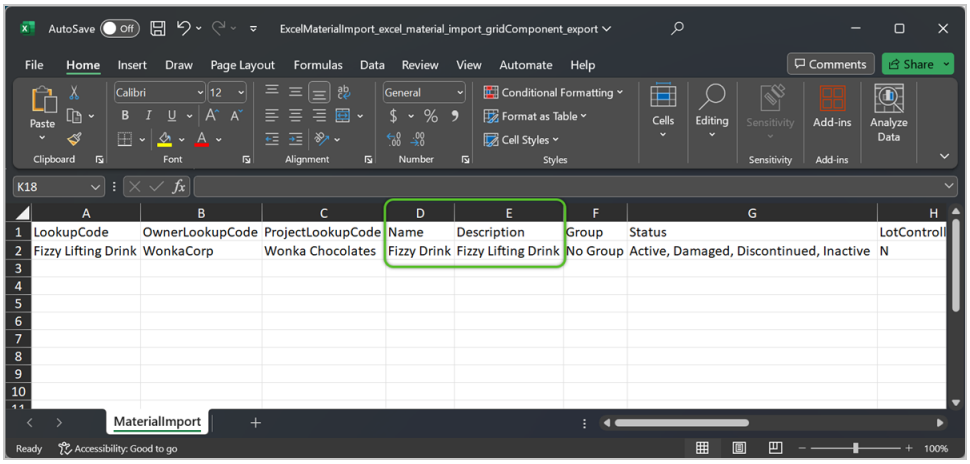
Note

When adding data to the material 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 fields in Footprint. An error will occur when importing if values in the file do not exactly match those in Footprint.

3. In required columns A, B, and C, enter the material **LookupCode**, **OwnerLookupCode**, and the **ProjectLookupCode**, respectively.

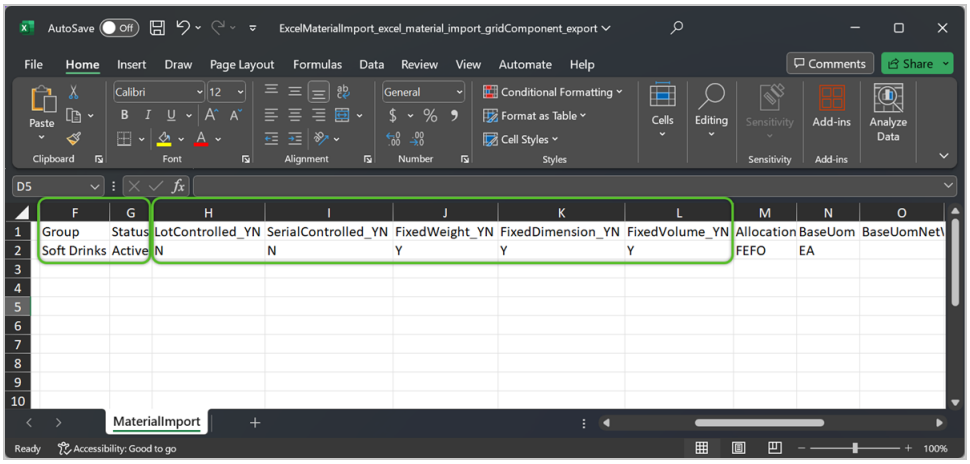


4. Enter the required material **Name** and **Description**.



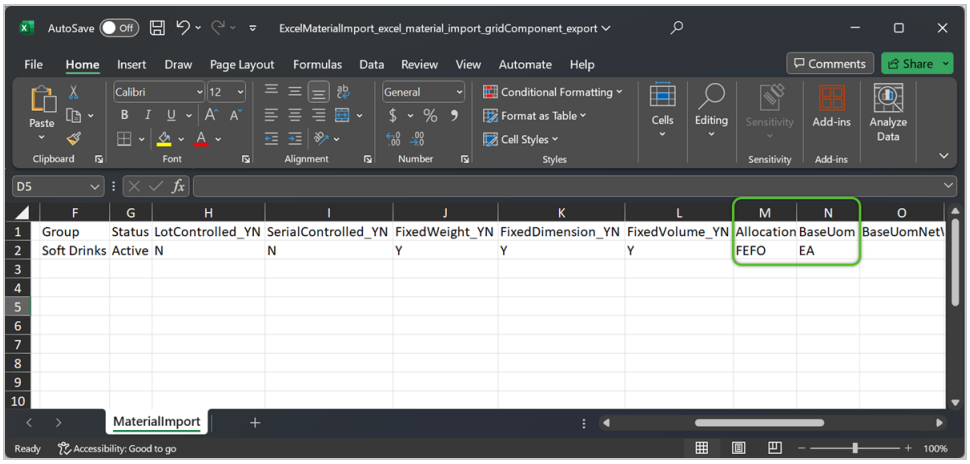
5. Enter the required **Group** and **Status**, then indicate either **Y** or **N** to **LotControlled_YN**, **SerialControlled_YN**, **FixedWeight_YN**, **FixedDimension_YN**, and **FixedVolume_YN**.

The Material **Group** drives custom behaviors for handling or billing. **Lot Controlled** Materials use Lots, capturing **Manufacturing** and **Expiration Dates**. **Serial Controlled** Materials add **Serial Numbers** for each individual piece of Inventory.

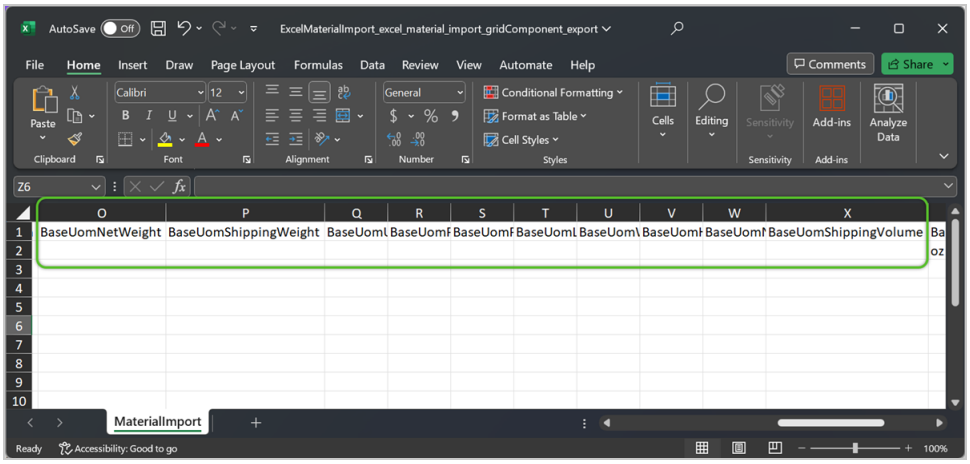


6. Select a required **AllocationStrategy** and indicate the **UOM** (Unit of Measure). The **UOM** value is the **Short Name** of the **Packaging** in Footprint.

When multiple Packaging levels exist for a Material, import the base UOM first. Then, either add the others manually, or use the Material Packagings import template.

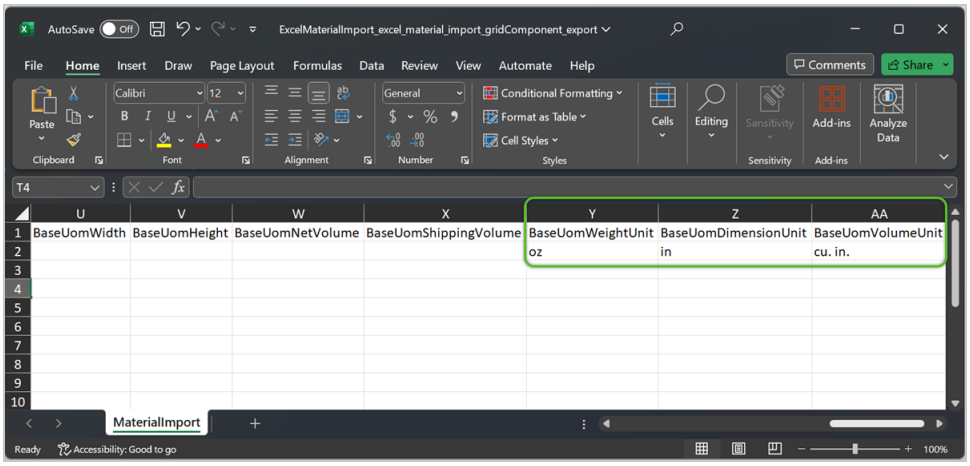


7. When possible, enter details in the remaining optional columns, keeping mind that the Import process is not intended for future data updates.



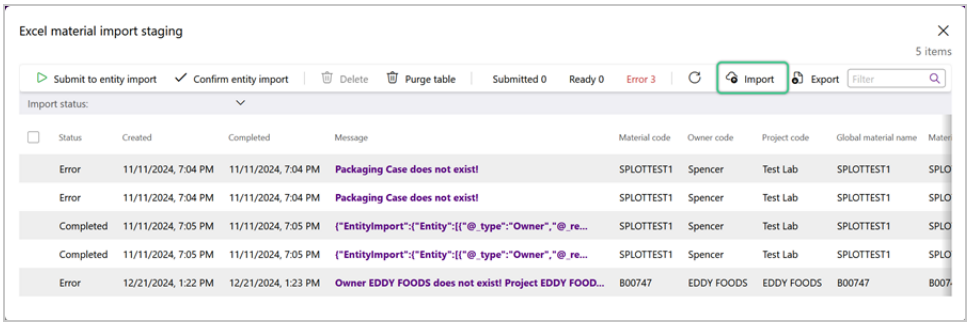
8. Indicate the required **BaseUomWeightUnit**, **BaseUomDimensionUnit**, and **BaseUomVolumeUnit**.

9. Save and close the spreadsheet.

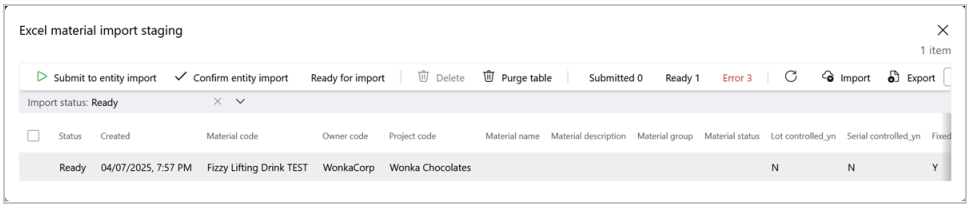


Step 4. Import the Materials File

1. Click **Import** in the **Excel Material Import Staging** window toolbar to select the file for upload. It may take a while for the Staging process to complete.

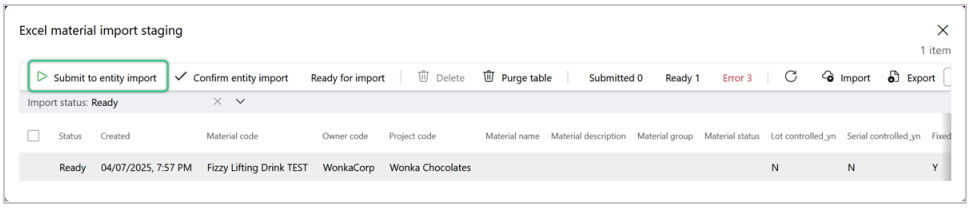


The material details from the spreadsheet will display for review.

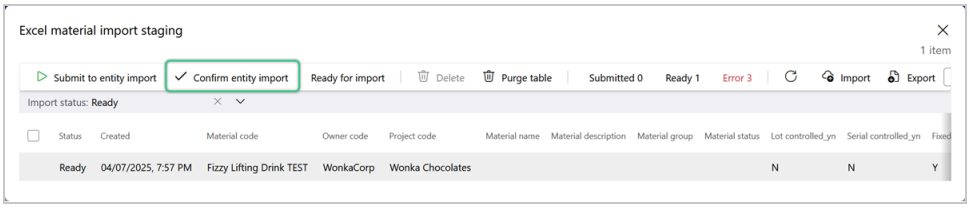


Step 5. Review and Ready the Materials for Import

1. Click **Submit to Entity** Import to validate the imported Material data for errors. Resolve any errors by making changes to the spreadsheet, then import the updated file.



2. Click **Confirm Entity Import** to import the Materials after any errors have been addressed.



The newly imported materials will now display alongside other materials in the Materials Hub.

Create a Material Catalog

When using the same Materials between different Owners and Projects, a **Material Catalog** allows those Materials to be used in each Project without having to create them multiple times. Any Project subscribed to a Material Catalog will have access to all the Materials in that Catalog. When details of a Material in a Catalog are edited, those details are updated for the Material in all associated Projects.

Note

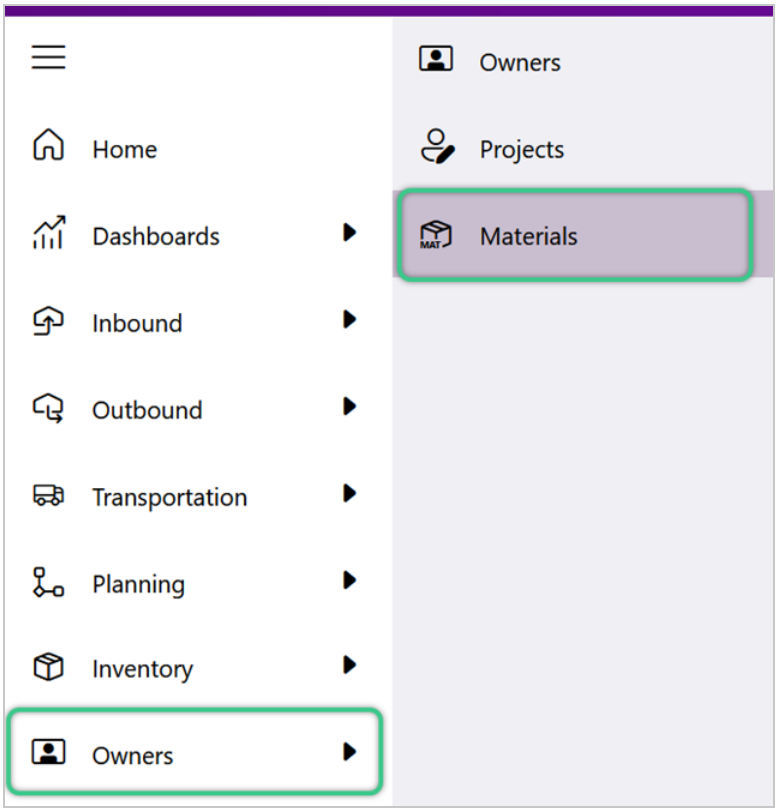
If you are also using Footprint Legacy, please contact Datex before creating any Material Catalogs.

Prerequisites

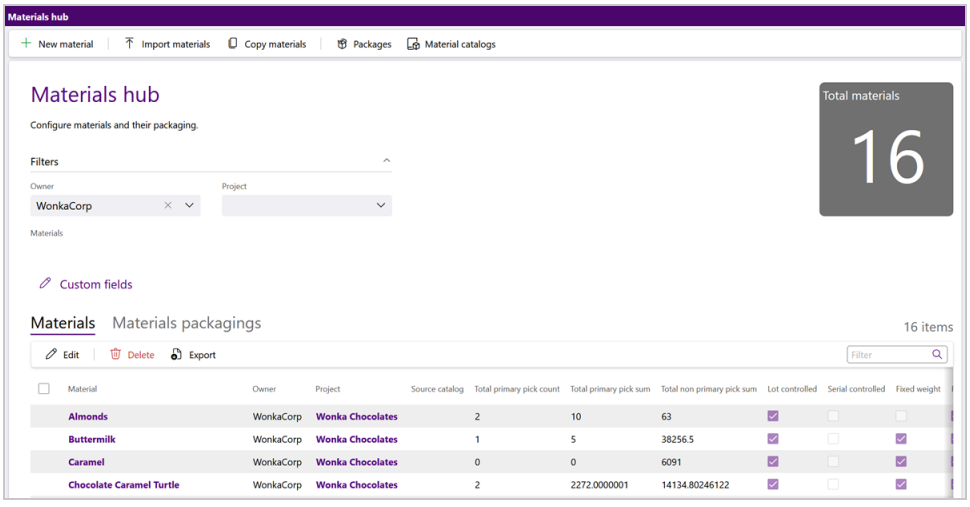
- Owner
- Project
- Materials

Step 1. Open the Materials Hub

1. Click **Owners** in the left navigation menu and select **Materials**.

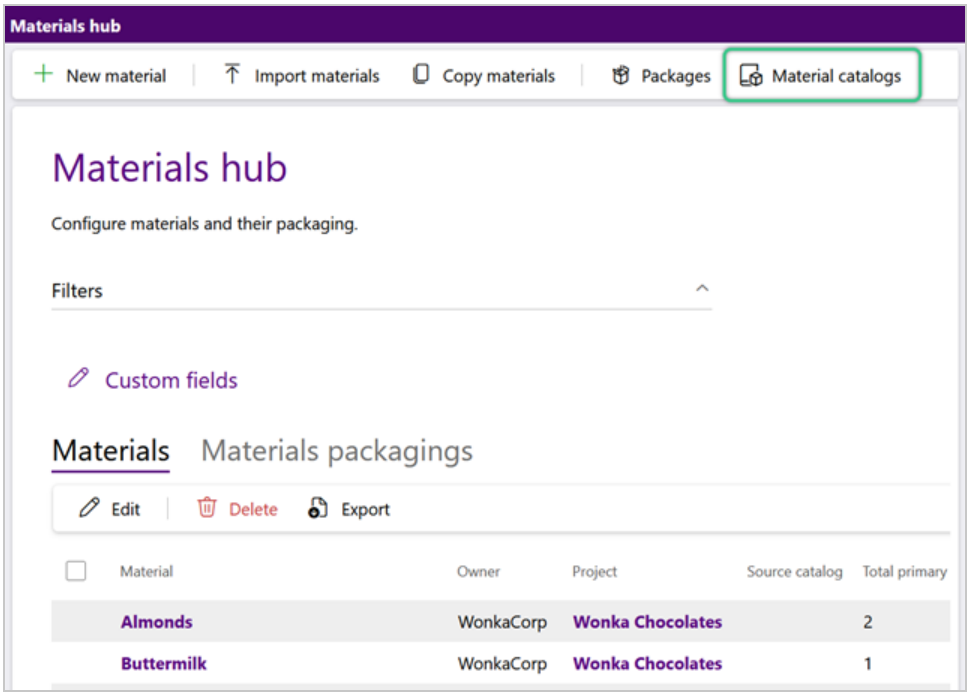


The **Materials Hub** will display.

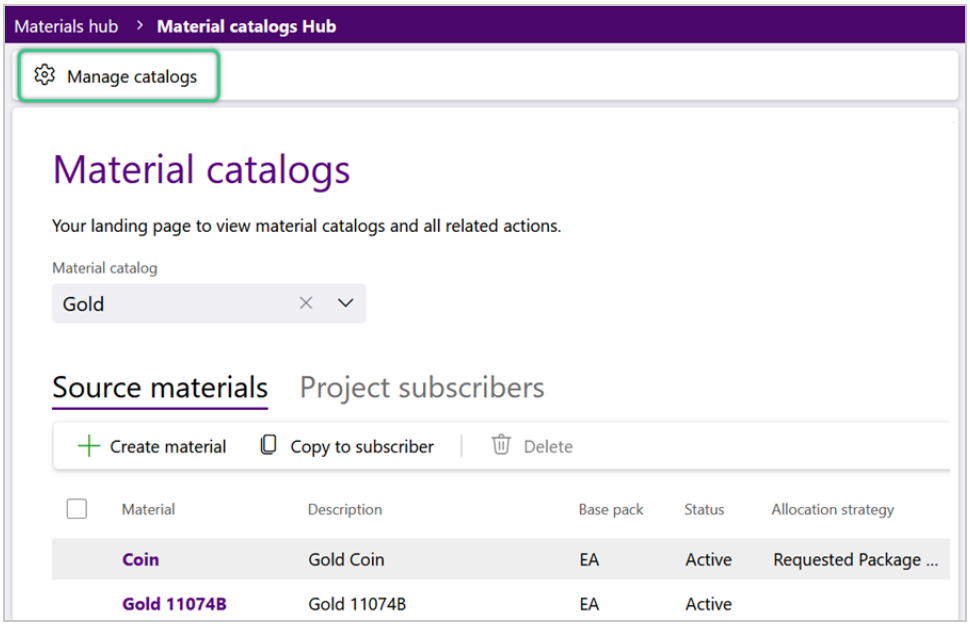


Step 2. Create a Material Catalog

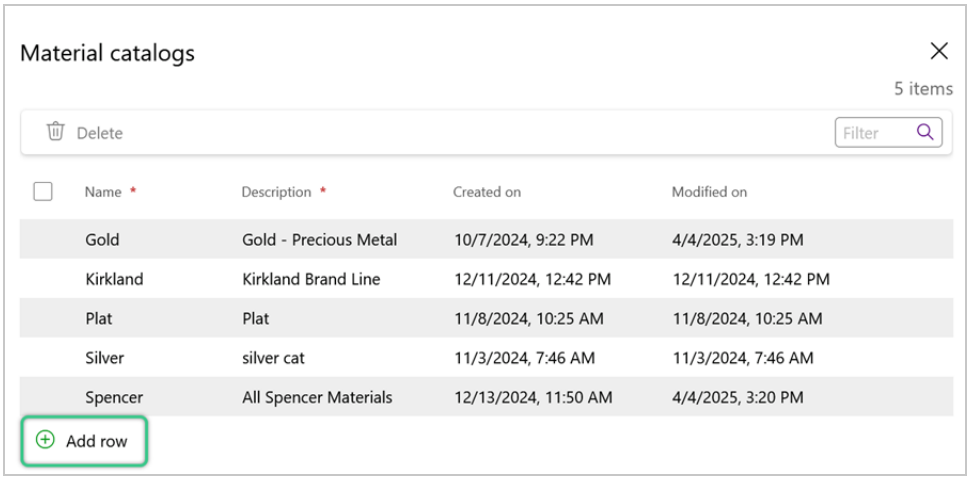
1. Click the **Material Catalogs** button in the top toolbar.



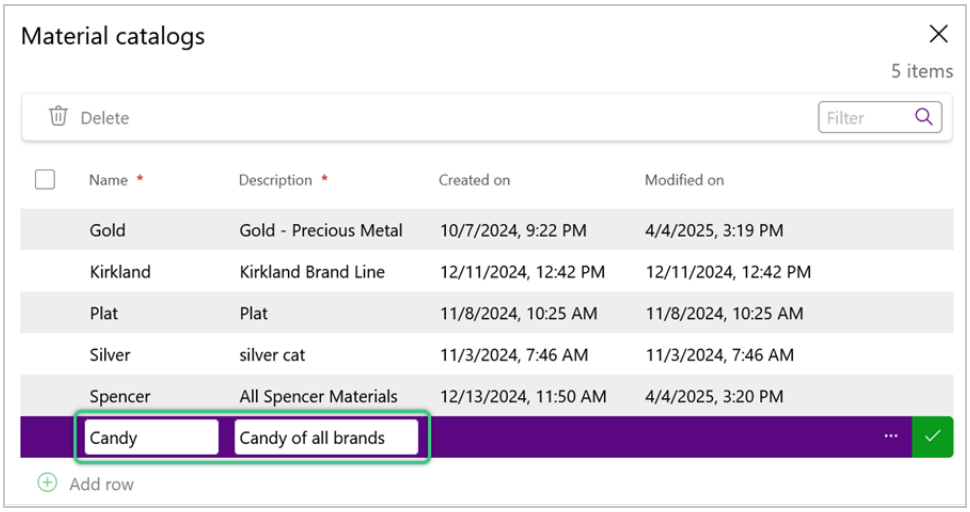
2. Click the **Manage Catalogs** button in the top toolbar.



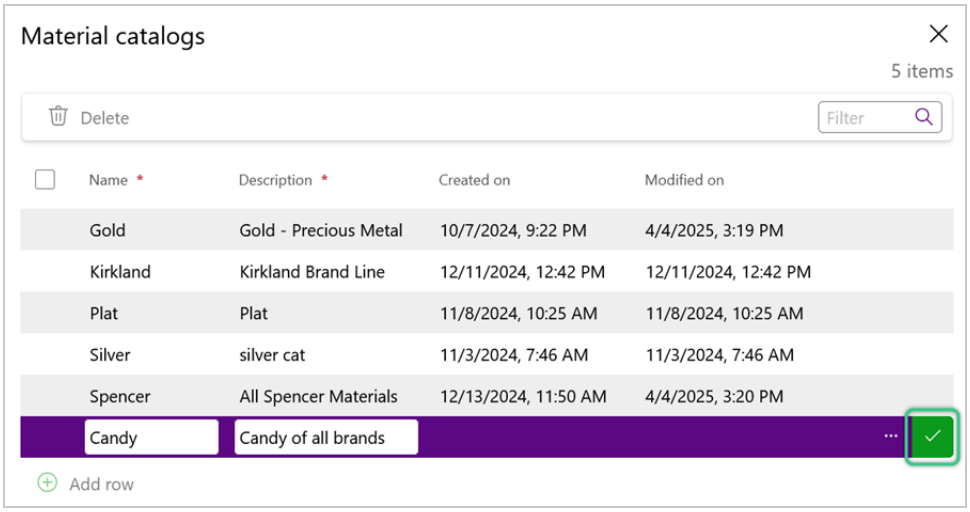
3. Click the green **+ Add Row** option in the bottom left corner of the Material Catalogs window.



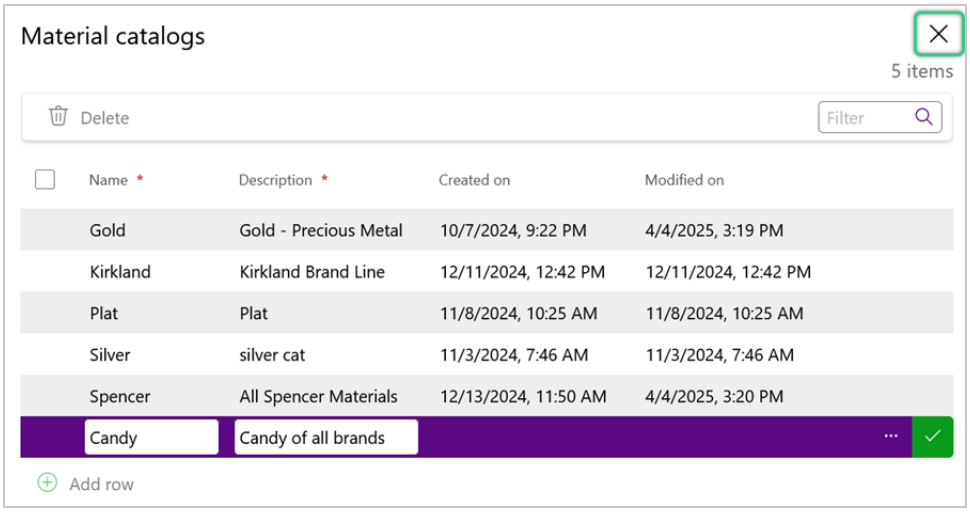
4. Enter the **Name** and **Description** of the Catalog.



5. Click the green check mark to **Save** the new Material Catalog.

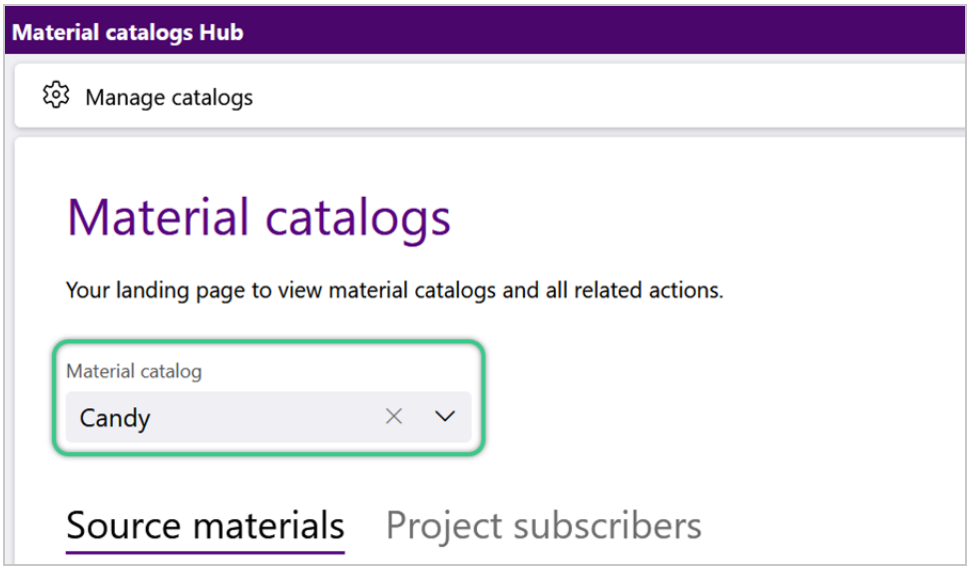


6. Click the **X** in the top right corner of the window to close the window and begin adding Materials to the new Catalog.

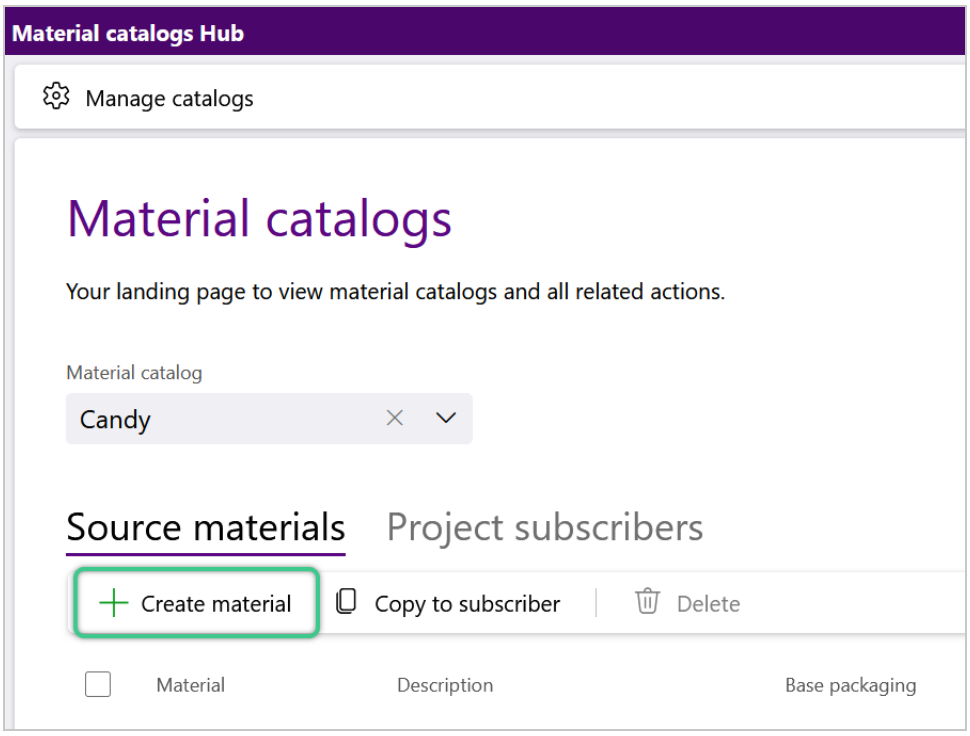


Step 3. Create Materials for the Catalog

1. Select the new **Material Catalog** from the drop down.

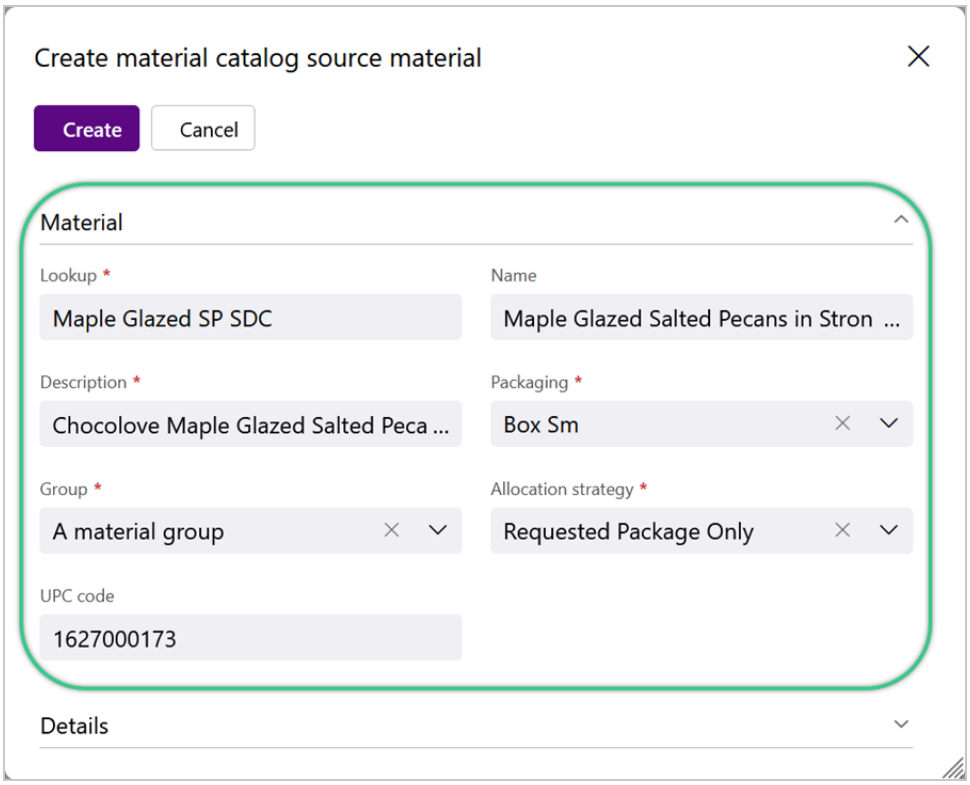


2. Click the **Create Material** button in the **Source Materials** tab toolbar to begin adding materials to the selected catalog.



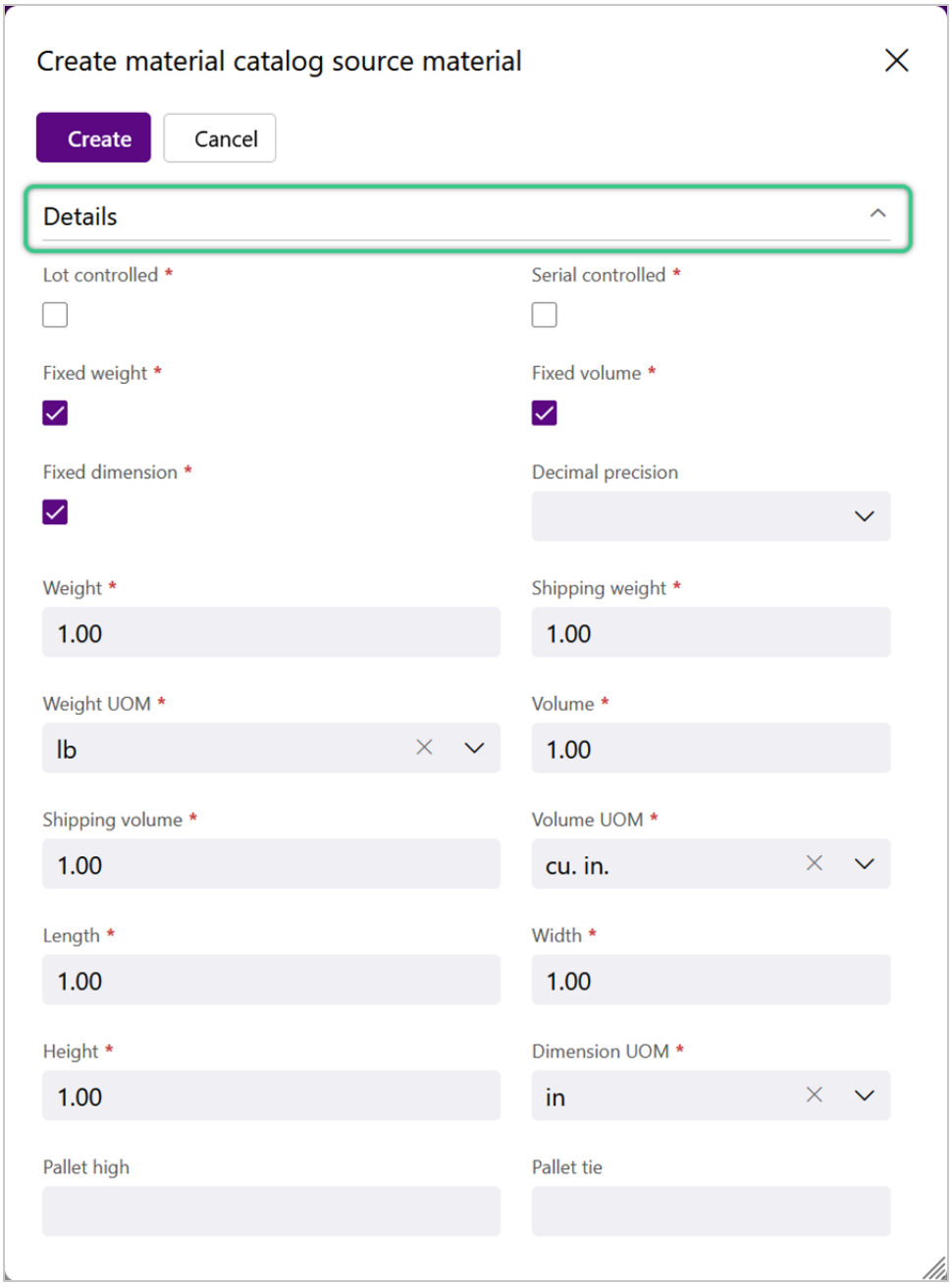
3. Enter the basic information for the Catalog Material.

For more details on creating Materials, please visit our **Materials Guide**.

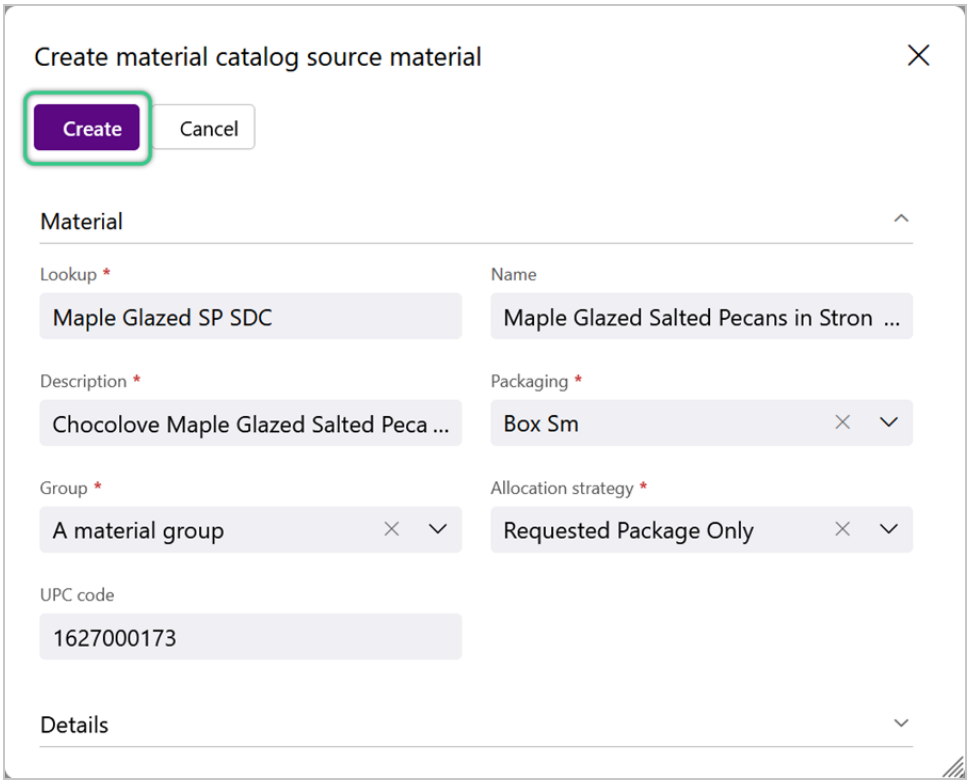


4. Enter **Details** for the Catalog Material. These details help with a more accurate Suggested Putaway and better Cartonization.

For more details on creating Materials, please visit our **Materials Guide**.



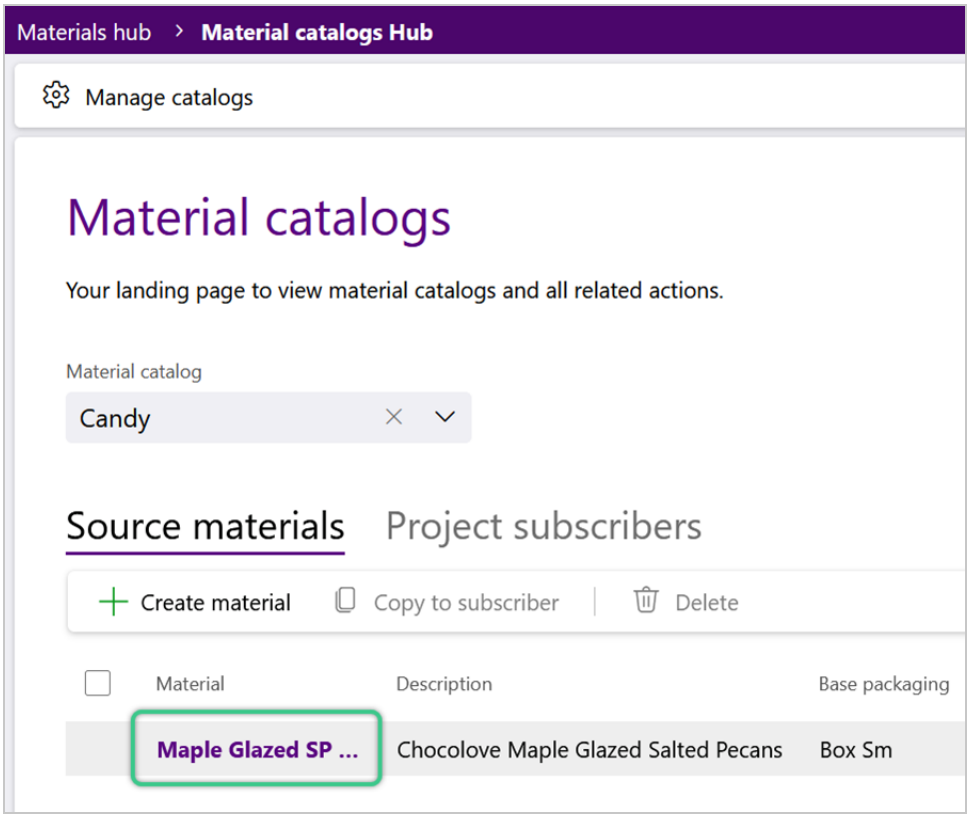
5. Once you've finished, click the purple **Create** button in the top left corner of the window.



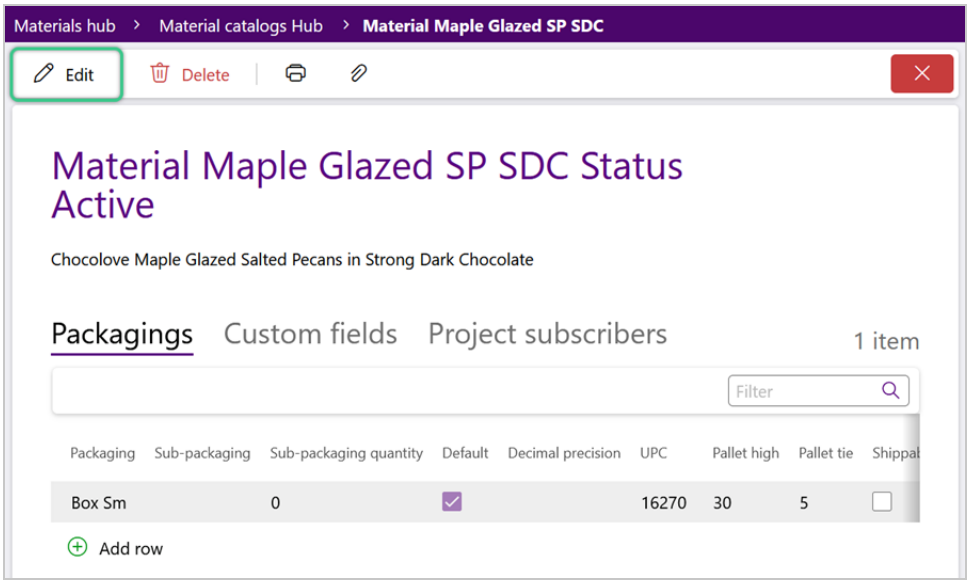
Step 4. Complete the Material Setup

Once a Material has been created, there are many more options that can be setup for its Configuration and Manufacturing. For more details about editing a Material, please visit our **Materials Guide**.

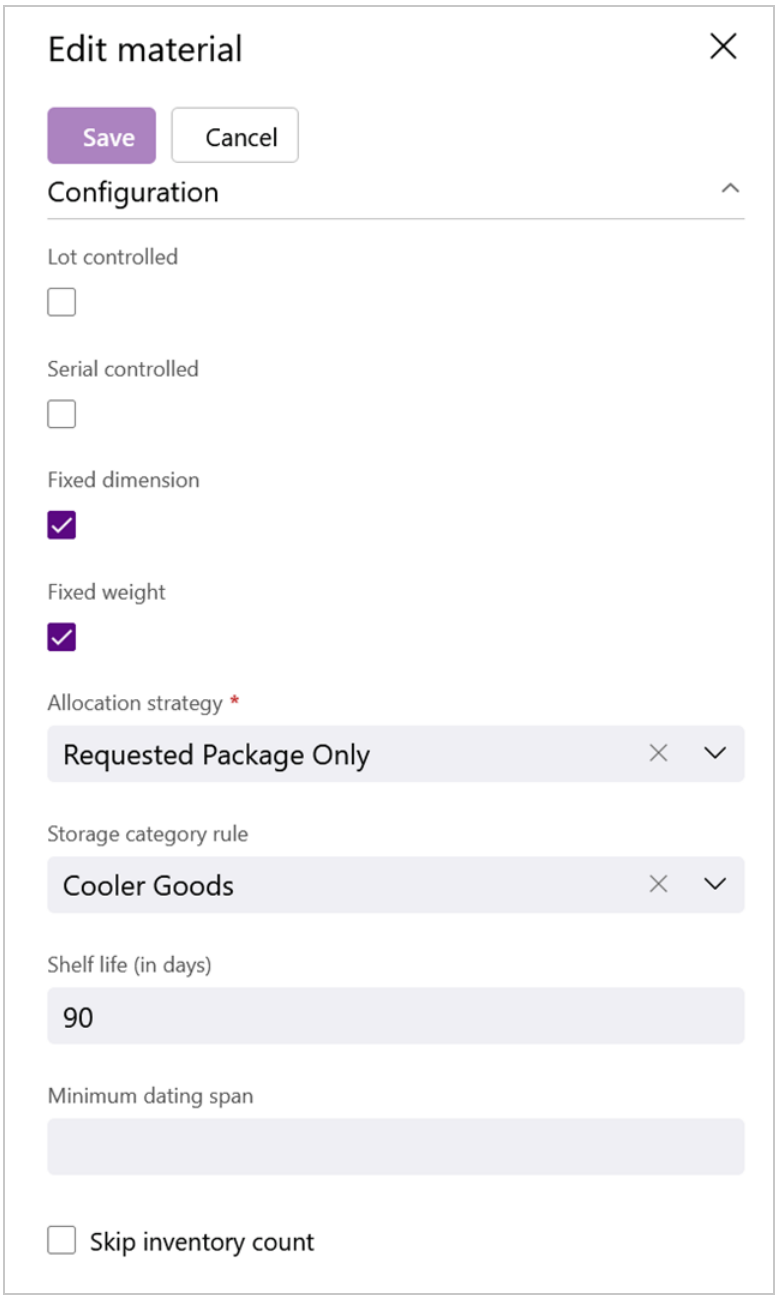
1. Click the name of the Material in the **Source Materials** tab.



2. Click the **Edit** button in the top toolbar to enter Configuration and Manufacturing settings.

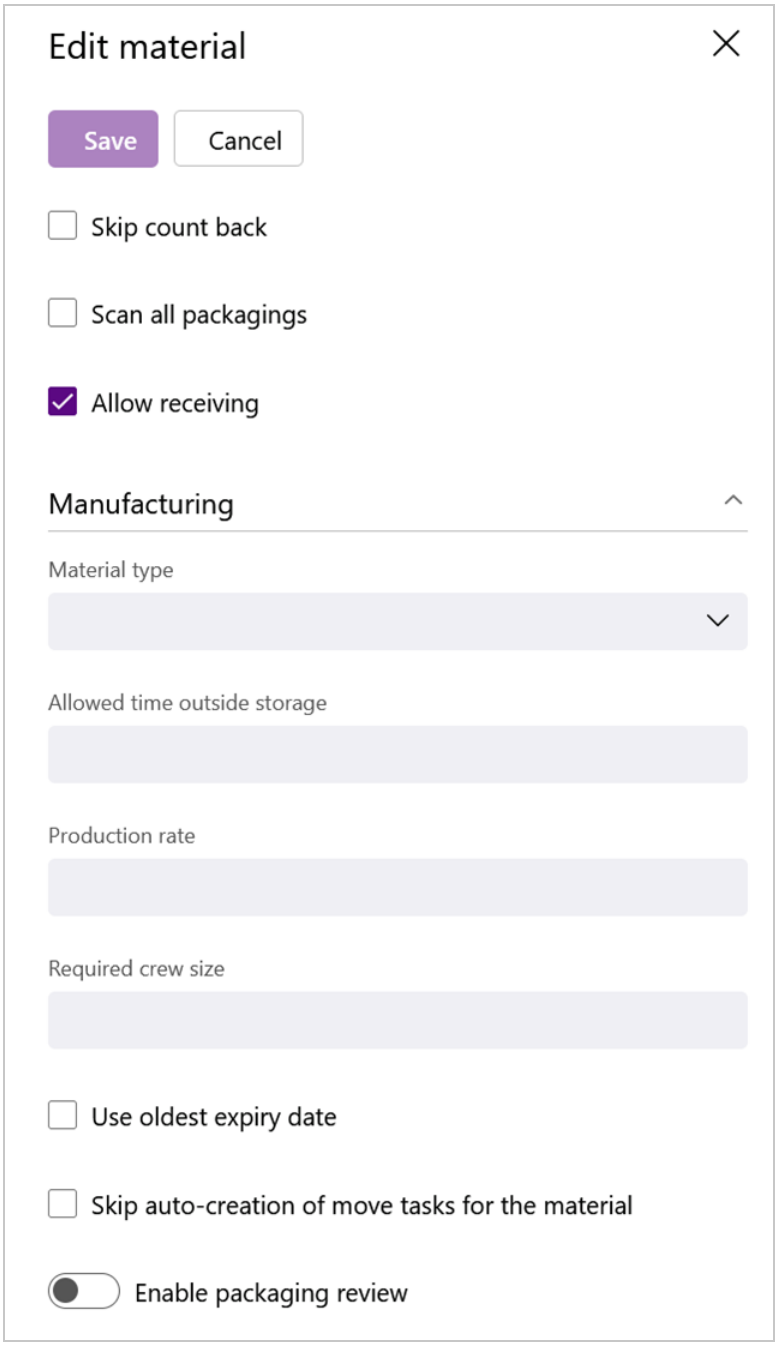


3. Enter the **Configuration** settings. and Manufacturing settings.

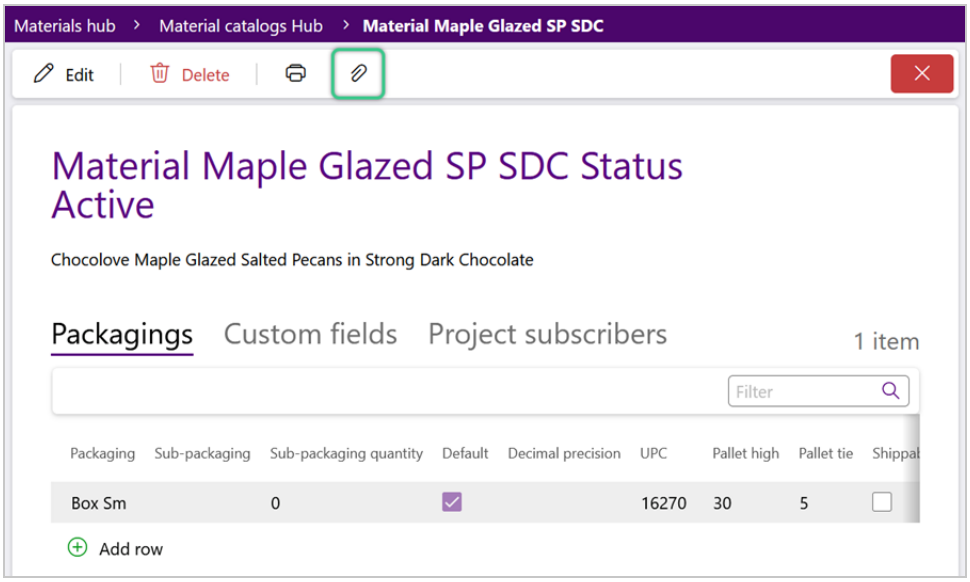


3. Enter the **Manufacturing** settings.

4. Click the purple **Save** button in the top left corner of the window to continue setting up the Catalog Material.

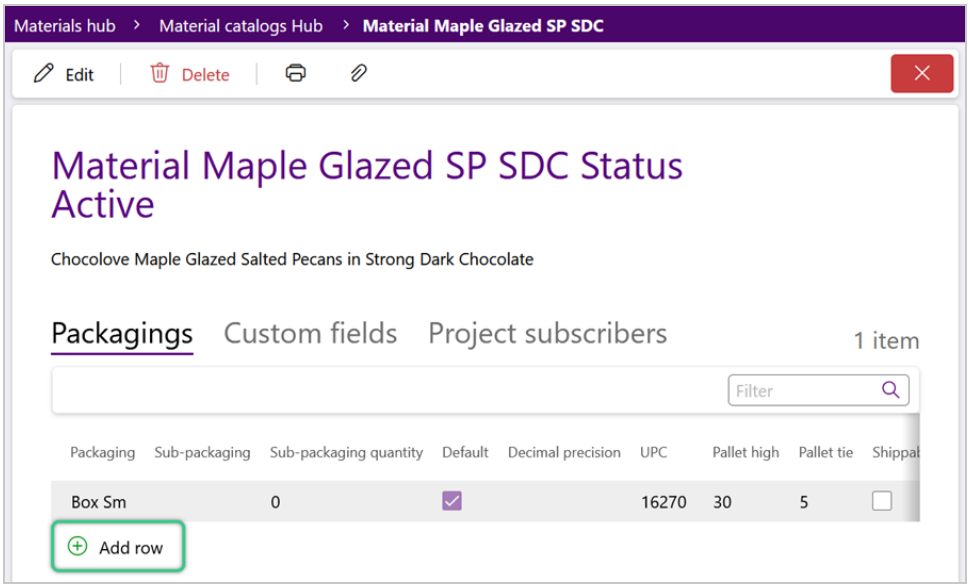


5. Click the **Attachments** icon to add any related files, including images.



6. Click the green **+ Add Row** option in the **Packagings** tab to add more Packagings for the Catalog Material.

To view **Custom Fields** and **Project Subscribers**, click the respective tabs.



Continue creating and setting up new Materials until the Catalog is complete.

Once a Catalog is ready for use, Projects can subscribe to it and have access to its Materials.

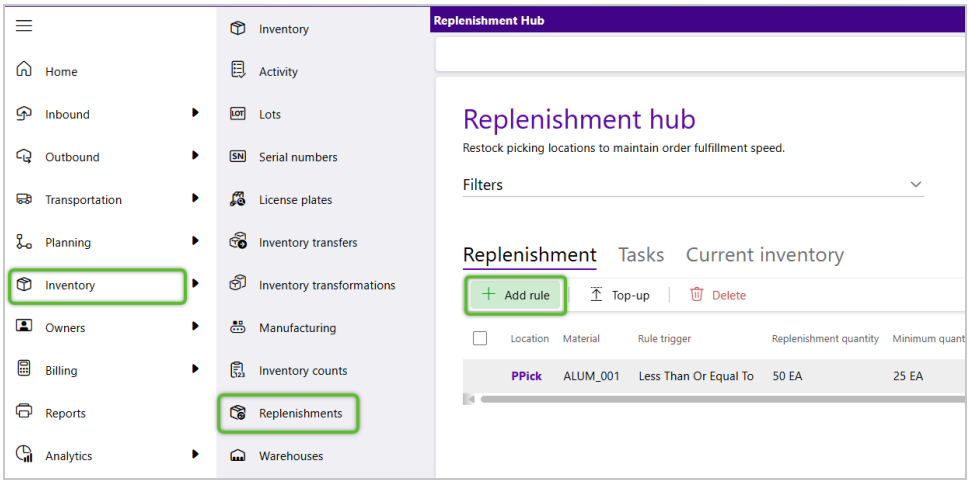
Add a Replenishment Top Up Rule

Replenishments are **Rules** set up to ensure that whenever the Inventory in a Location runs low, **Replenishment Tasks** are automatically created to have more Inventory brought to that Location from other Locations within the Warehouse. This is particularly useful when setting up a Primary Pick Location.

1. Click **Inventory** in the left navigation menu and select **Replenishments**.

The **Replenishment Hub** will display.

2. Click **+ Add Rule** in the **Replenishment** tab toolbar.



The **Create New Rule** window will display along the right side of the page.

3. In the **Replenishment Information** section, select the required **Location**.

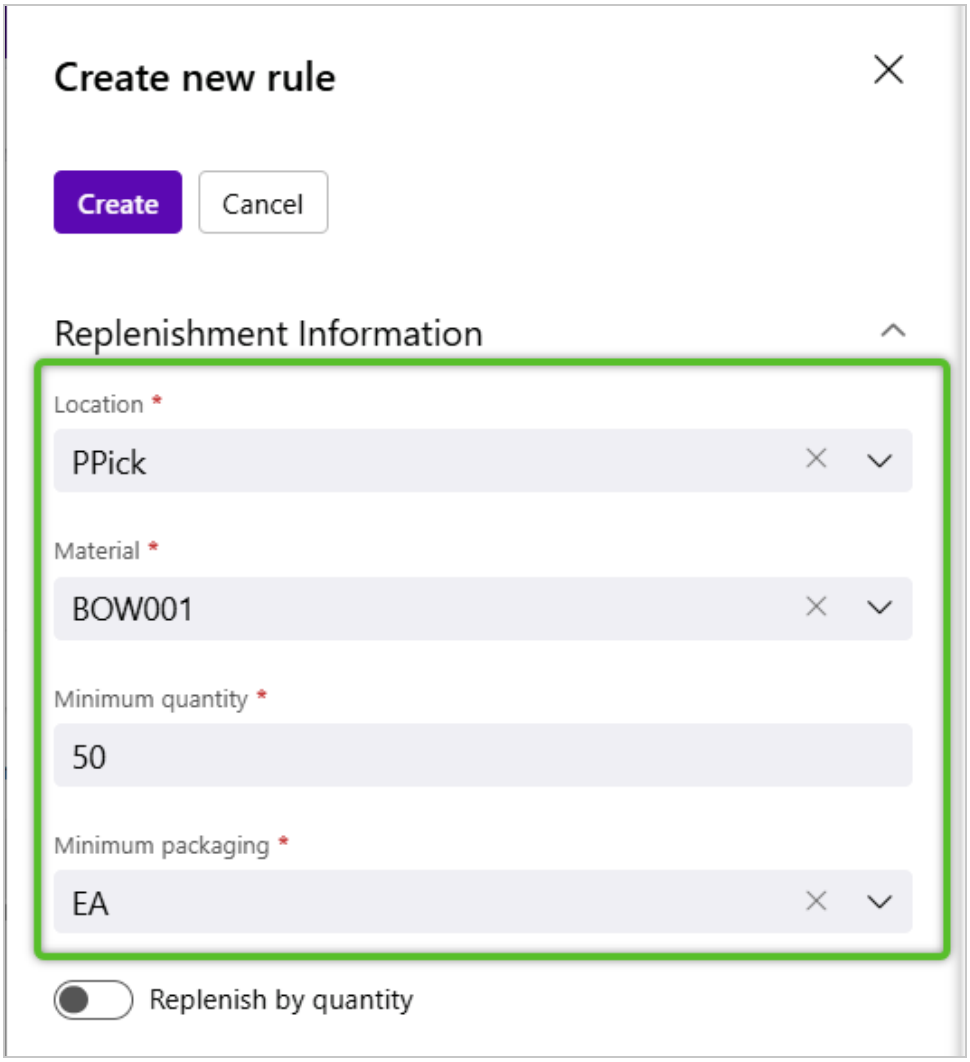
4. Select the required **Owner** and **Project**.

The **Material** selector will replace the **Owner** and **Project** fields.

5. Select the **Material** to be replenished.

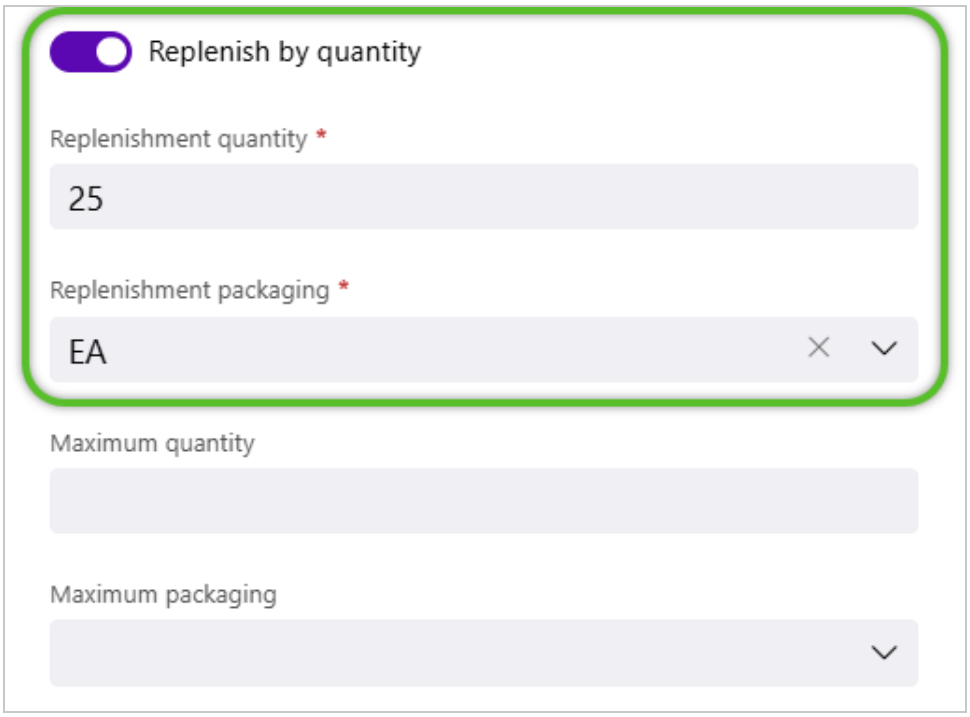
6. Select the required **Minimum Quantity** and **Minimum Packaging** to trigger the replenishment.

These determine the minimum amount of the Materials and Material Packagings available in the Location before requiring replenishment.



7. To **Replenish by Quantity**, click the toggle to enter the required **Replenishment Quantity** and **Replenishment Packaging**.

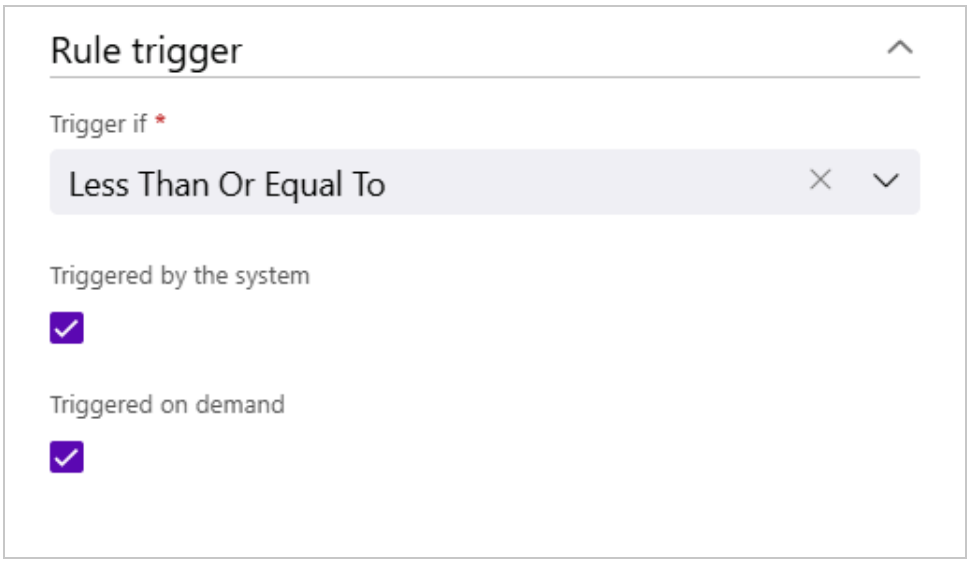
8. If necessary, set a **Maximum Quantity** and **Maximum Packaging**.



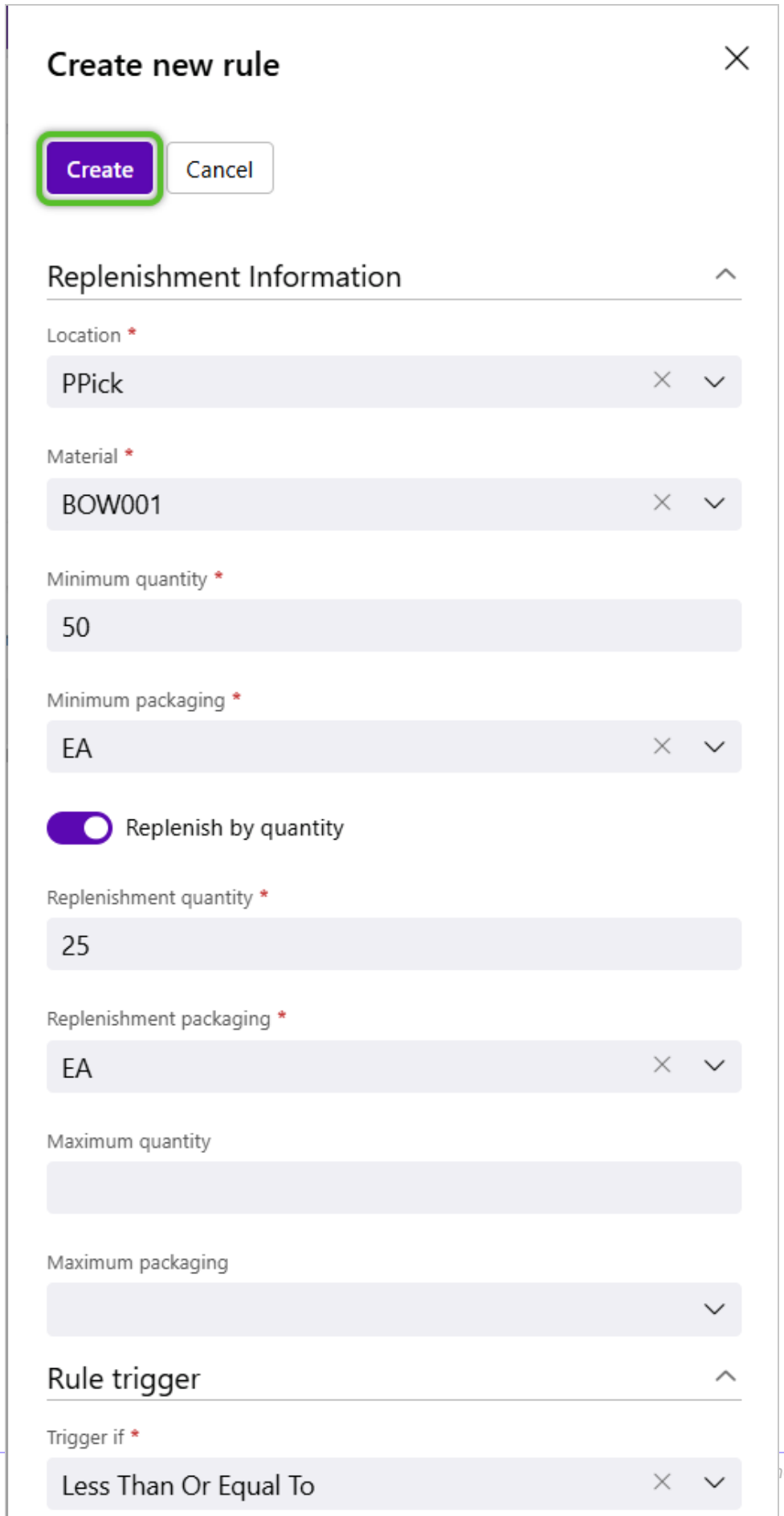
9. In the **Rule Trigger** section, select a required **Trigger If** option from the drop down.

The **Triggered by the System** box is checked by default.

10. When necessary, check the box to allow the **Replenishment to be Triggered On Demand**.



11. Once the details for the new Replenishment Rule have been set, click the **Create** button at the top of the window.


Create new rule
Create
Cancel
Replenishment Information
Location *
PPick
Material *
BOW001
Minimum quantity *
50
Minimum packaging *
EA
Replenish by quantity
Replenishment quantity *
25
Replenishment packaging *
EA
Maximum quantity
Maximum packaging
Rule trigger
Trigger if *
Less Than Or Equal To

The new Replenishment Rule will go into effect immediately.

Inbound Orders Guide

Sections

- Overview
- Inbound Hub
- Inbound Order
- Inbound Process

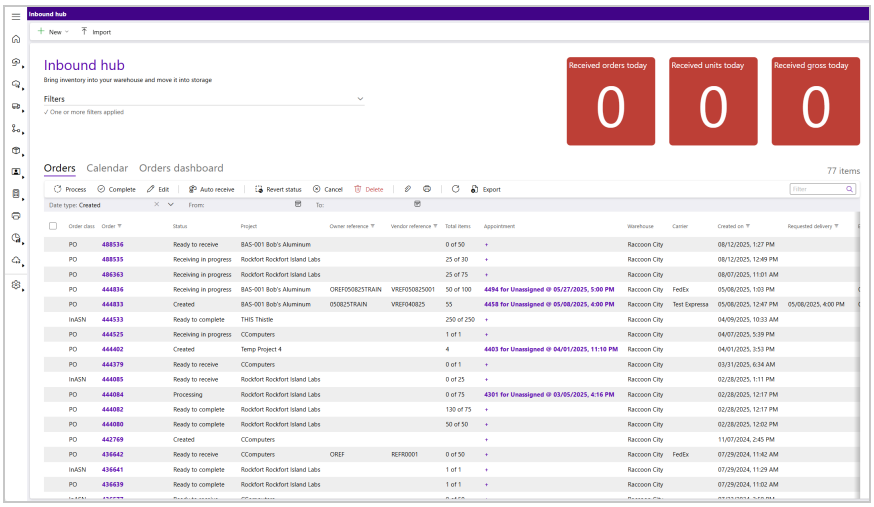
Overview

From the Inbound Hub, users can create and Inbound Orders. Inbound Orders bring Materials into your Warehouse through Shipments, and are the starting point for the entire Inbound Operation. Inbound ASN Orders do the same, but also specify precisely what will be coming into your Warehouse.

The Inbound Process is comprised of placing an Order, Receiving that Order's Shipments when they arrive, the Putaway of the Received Materials into their storage Locations in the Warehouse, and Completing the Order so all necessary information is sent to Billing.

Inbound Hub

The Inbound Hub allows you to create and manage all Inbound Orders created in your system. All active Inbound Orders are listed, defaulting to the most recent Inbound Orders at the top. In the top, right corner are three tiles indicating the number of **Received Orders Today**, **Received Units Today**, and **Received Gross Today**.



Icons along the top of the Inbound Hub allows users to create new Inbound Orders. For more details, please jump to our **Create an Inbound Order** section below.

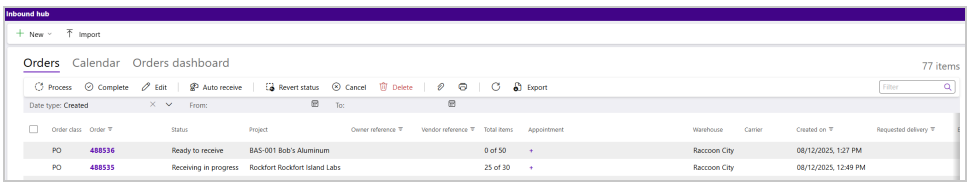
Search and filter options are available to quickly locate Inbound Orders for review and management. Users can filter by Owner, Project, Material, Warehouse, Status, Order Class, Reference Number, and Date ranges for all Date Types (Created, Requested Delivery, Fulfillment, Modified, and so on).

Inbound Hub Tabs

The Inbound Orders display in the **Orders** tab, but can also be viewed on the **Calendar** and **Orders Dashboard** tabs. Each tab on the Inbound Hub displays it's own set of information and options for managing that information. Expand the sections below for more details about each tab.

Orders

The **Orders** tab lists all Inbound Orders, with the most recent at the top.



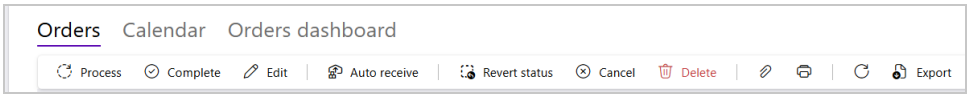
Order Information

Order:	The Order number.
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 received out of the total items expected.
Appointment:	The unique ID number for the Appointment. This link opens the Dock Appointment Editor. The plus icon can be clicked to create a Dock Appointment for the Inbound Order.
Created:	The date and time the Order was created.
Fulfillment:	The date and time the Order was fulfilled.
Expected:	The Date the Delivery is Expected by, if specified in the Order's creation.
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.
Warehouse:	The Warehouse where the Order was Created.
Carrier:	The Carrier for the Order's Dock Appointment.
Ship From:	The Ship From Address for the Order.
Notes:	Any Notes for the Order.

Orders Tab Toolbar

The **Orders** tab toolbar provides options to manage selected Inbound Orders, such as Update, **Process**, **Auto-Receive**, **Complete**, and more.



Update:	The **Update** option opens the selected Order for further review and updates.
Refresh:	The **Refresh** option refreshes the list of Inbound Orders.
Process:	The **Process** option processes the selected Inbound Order(s).
Auto-Receive:	The **Auto-Receive** option auto-receives the selected Inbound Order (s).
Complete:	The **Complete** option completes the selected Order(s).
Cancel:	The **Cancel** option stops selected Order(s) once it's been started.
Revert:	The **Revert** option reverts selected Order(s) from the status of Received or Canceled back to the Created status.
Delete:	The **Delete** icon deletes selected Order(s).
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.

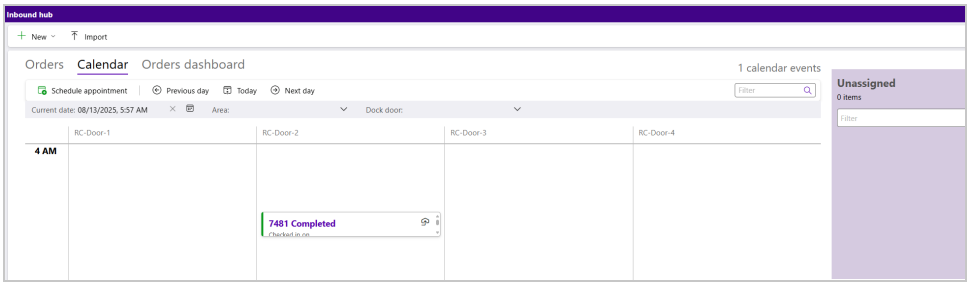
Attachments: The **Attachments** paperclip icon opens the Attachments window for the selected Order.

Export List: The **Export** option exports the details of the Order in an Excel file (where available).

Calendar

The **Calendar** tab displays Dock Appointments for Inbound Orders, along with options to create and edit Dock Appointments, and navigate them by day, time, Area, and Dock Doors.

Appointments with no dock Door assigned will be listed in the blue Unassigned section along the right.



Dock Appointment Information

Dock Door: The Dock Door for the Appointment is displayed as the column header.

Appointment ID and Status: The unique ID number for the Appointment and the Status of the Appointment. For example, Open. This link opens the Dock Appointment Editor.

Order Type: An Icon in the top right that indicates the Dock Appointment is for an Inbound Order.

Scheduled Arrival: The Order's Scheduled Arrival date and time.

Checked In On: The date and time of the Order's Check In, when applicable.

Project: The name of the Inbound Order's Project.

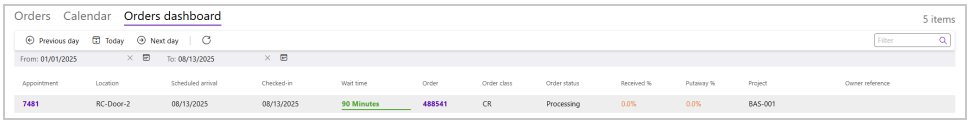
Order: The Inbound Order number and the Order's Status.

Progress: The Progress of the Order's Dock Appointment.

Carrier: The Carrier for the Order's Dock Appointment.

Orders Dashboard

The **Orders Dashboard** tab displays Inbound Orders sorted by upcoming Scheduled Arrival times by default. The Inbound Orders Dashboard offers options to view and update both the Inbound Order's Dock Appointment and the Inbound Order itself.

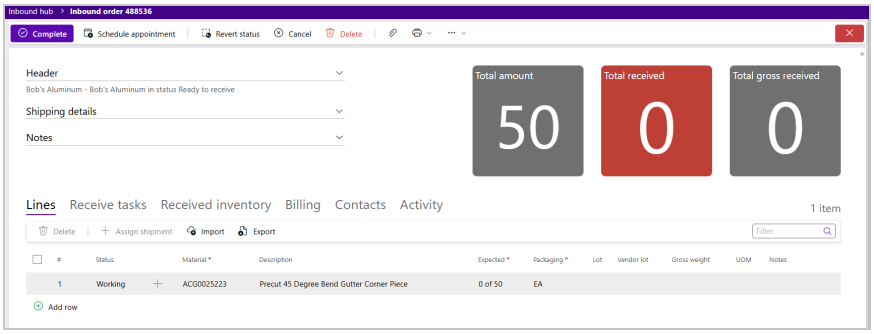


Orders Dashboard Information

Appointment ID:	The unique ID number for the Appointment. This link opens the Dock Appointment Editor.
Location:	The Order's Appointment Dock Door.
Scheduled Arrival:	The Order's Scheduled Arrival date and time.
Checked In On:	The date and time of the Order's Check In, when applicable.
Wait Time:	The number of minutes since the Order was Checked In.
Order:	The Lookup number for the Order.
Order Class:	The Order Class the Order has been assigned to.
Order Status:	The Inbound Order's Status.
Received %:	The percentage of the Order that has been Received.
Putaway %:	The percentage of the Order that has been Putaway.
Project:	The Name of the Project associated with the Order.
Owner Reference:	The Reference Number given to the Order for the Owner's Reference.

Inbound Order

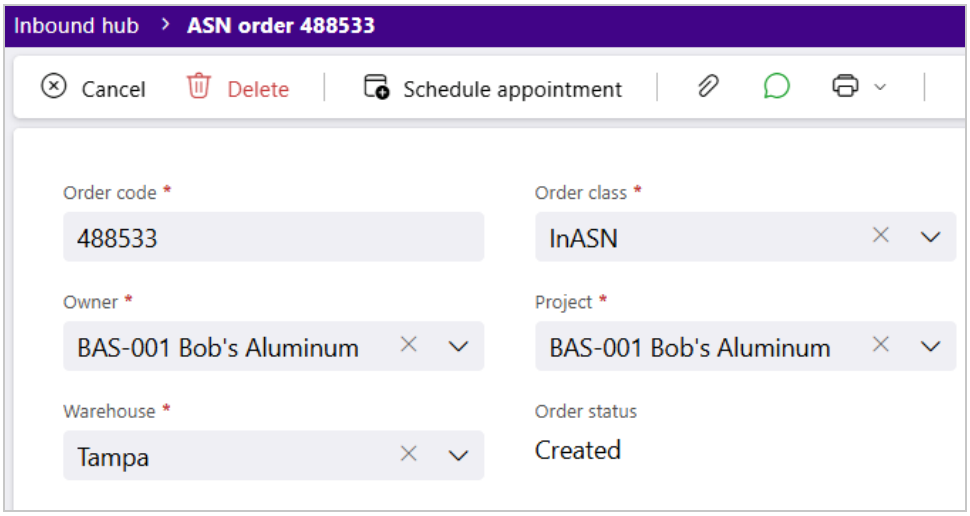
The Inbound Order can be opened for further review and management by clicking the blue Inbound Order **Lookup** number. In the top right corner are three tiles indicating the **Total Amount**, **Total Received**, and **Total Gross Received** for the Inbound Order.



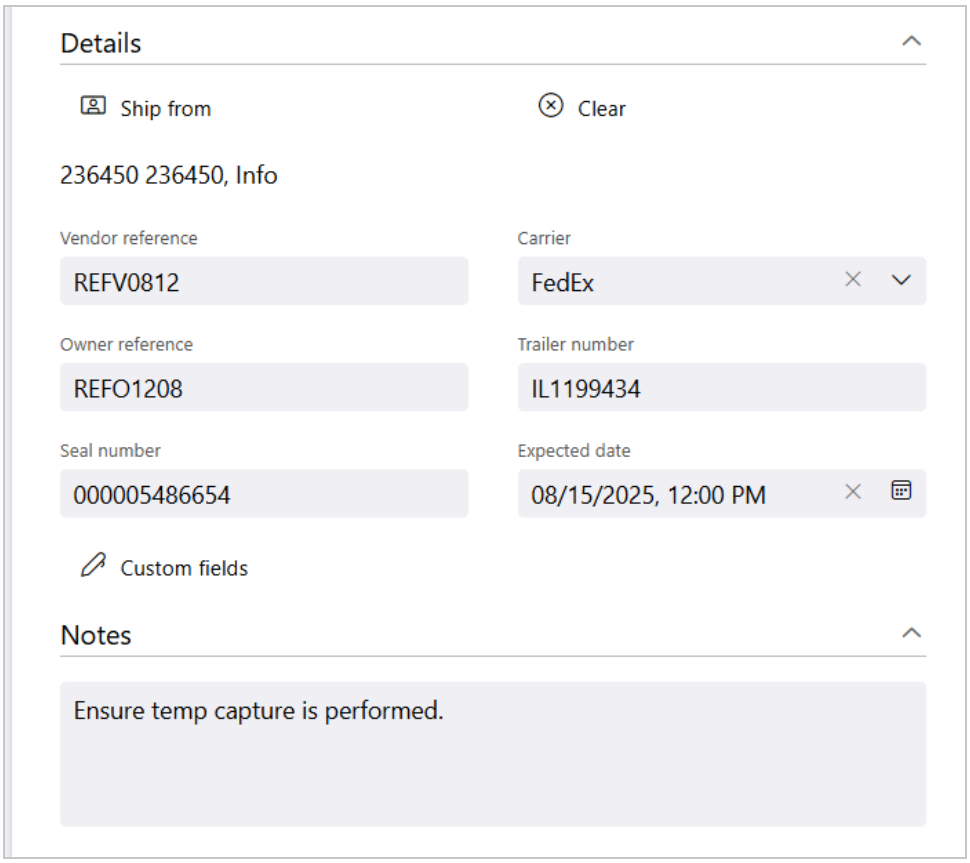
The Inbound Order's basic information will be displayed, including the Order **Lookup** number, **Order Class**, **Owner**, **Project**, **Warehouse**, and **Order Status**. The **Details** section can be opened for more information about the Order.

Icons along the top of the Inbound Order provide options to manage the order. For more details, please visit the **Inbound Order Toolbar** section below.

Inbound Order Details



Lookup: The Lookup Number for the Order.
Order Class: The Order Class the Order has been assigned to.
Owner: The Name of the Owner for whom the Order was created.
Project: The Name of the Project associated with the Order.
Warehouse: The Warehouse where the Order was Created.
Order Status: The current Status of the Order.



Ship From: The Ship From Address for the Order.

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.

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

Trailer Number: The Trailer Number for the Order.

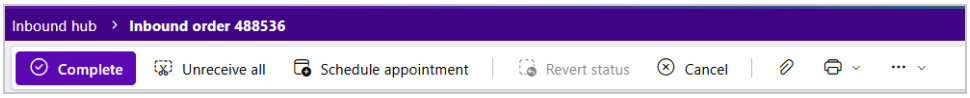
Seal Number: The Seal Number for the Order.

Notes: Any Notes for the Order.

Custom Fields: Specific to your organization.

Inbound Order Toolbar

The Inbound Order toolbar provides everything needed to manage an Inbound Order. Icons in the toolbar vary depending upon the Status of the order.



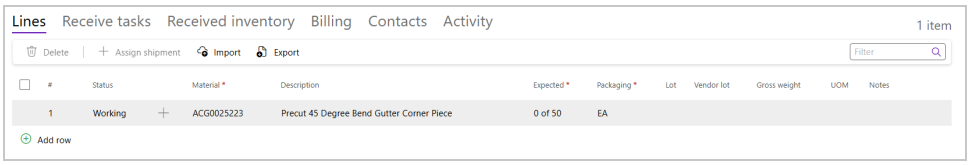
Complete:	The **Complete** option completes the Inbound Order.
Unreceive All:	The **Unreceive All** option unreceives all received Inventory for the order.
Process:	The **Process** option processes the Inbound Order.
Auto-Receive:	The **Auto-Receive** option auto-receives the Inbound Order.
Appointment:	The **Appointment** option opens the Dock Appointment window for creation or management.
Revert:	The **Revert** icon reverts an Inbound Order from the status of Received or Canceled back to the Created status.
Cancel:	The **Cancel** option stops the Inbound Order once it's been started.
Delete:	The **Delete** icon deletes the Inbound Order.
Attachments:	The **Attachments** paperclip icon opens the Attachments window for the selected Inbound 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.
Options... Dropdown:	The Inbound Order **Options...** dropdown icon provides the ability to **Add Comments**, **Driver Checkout**, **View & Send Auto-Emails**, **Perform Pallet Transactions**, **View Submitted Surveys**, **Add Temperature Readings**, and **Copy Order**.

Inbound Order Tabs

The Inbound Order's Order **Lines**, **Receiving Tasks**, **Receiving Invoices**, **Billing**, **Contacts**, and **Activity** are listed in the tabs along the bottom. Each tab on the Inbound Order displays it's own set of information and options for managing that information. Expand the sections below for more details about each tab.

Order Lines

The **Order Lines** tab displays the Inbound Order's Order Lines, along with options to **Add**, **Delete**, **Import**, and **Export** Order Lines.



Order Line Information

#:	The Order Line Number.
Status:	The Status of the Order Line.
Material:	The LookUp Code of the Material in the Order Line.
Packaging:	The Packaging UOM of the Material in the Order Line.
Expected:	The Quantity Received out of the Expected Quantity for the Order Line.
Lot:	The Lot assigned to the Material in the Order Line.
Vendor Lot:	The Vendor Lot assigned to the Material in the Order Line.
Gross Weight:	The Gross Weight of the Material in the Order Line.
UOM:	The Packaging UOM for the Material in the Order Line.
Material Description:	A Description of the Material in the Order Line.

Receiving Tasks

The **Receiving Tasks** tab displays the Inbound Order's Receiving Tasks, along with options to perform a **Bulk Lot Change**, do **Bulk Receiving**, and **Export** Receiving Tasks.



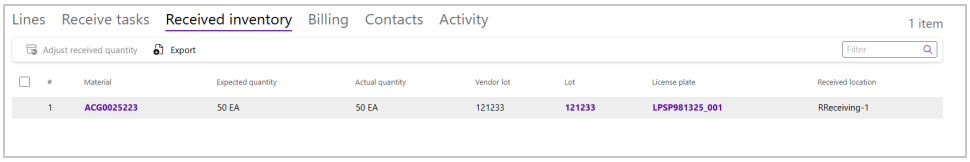
Receiving Tasks Information

Line #:	The Order Line Number for the Receiving Task.
Material:	The LookUp Code of the Material in the Receiving Task.
Packaging:	The Packaging UOM of the Material in the Receiving Task.
Received:	The Quantity of Material Base UOM Received for the Receiving Task.
Remaining:	The Quantity of Material Base UOM Remaining to be Received for the Receiving Task.
Receive Quantity:	The expected Quantity of the Material for the Receiving Task.

Damaged Qty:	The Quantity of Damaged Material in the Receiving Task, when applicable.
Receive Location:	The Receiving Location for the Material in the Receiving Task.
Receive LP:	The Receiving License Plate of the Material in the Receiving Task.
Lot:	The Lot assigned to the Material in the Receiving Task.
Vendor Lot:	The Vendor Lot assigned to the Material in the Receiving Task.

Received Inventory

The **Received Inventory** tab displays the Inbound Order's Received Inventory, along with options to **Unreceive** and **Export** selected inventory.

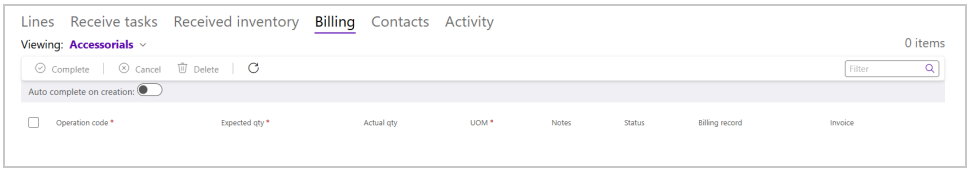


Received Inventory Information

Line #:	The Order Line Number for the Received Inventory.
Material:	The LookUp Code of the Material Received.
Total Expected:	The Total Expected Quantity of the Received Inventory.
Actual:	The Actual Quantity of Received Inventory.
License Plate:	The License Plate of the Received Inventory.
Current Location:	The Current Location of the Received Inventory.
Lot:	The Lot assigned to the Received Inventory.
Vendor Lot:	The Vendor Lot assigned to the Received Inventory.

Billing

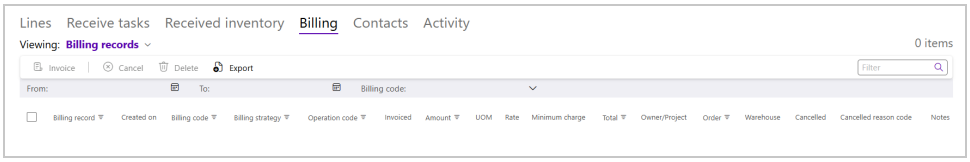
The **Billing** tab displays the Inbound Order's Accessorials and Billing Records, along with options to manage them. The Accessorials are listed by default, and Billing Records can be viewed by selecting that option from the dropdown.



Billing Information for Accessorials

Options for the Accessorials listed here include the ability to **Complete**, **Add**, **Remove**, and **Cancel** Accessorials, as well as the toggle to determine whether or not to **Auto Complete on Creation**.

Operation Code:	The Accessorial's Operation Code.
Actual Qty:	The Actual Quantity for the Accessorial.
Expected Qty:	The Expected Quantity for the Accessorial.
UOM:	The Base UOM for the Accessorial.
Status:	The Status of the Order Line.
Billing Record:	The LookUp Code of the Billing Record for the Inbound Order.
Notes:	Any Notes for the Accessorial.



Billing Information for Billing Records

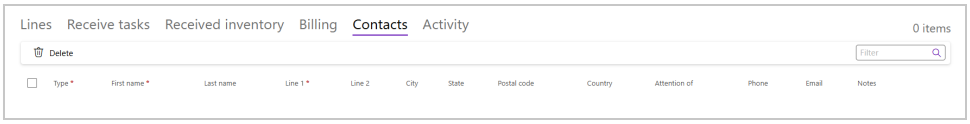
Options for the Billing Records listed here include the ability to **Create New** or **Add to Existing Invoice**, **Cancel**, **Delete**, **Export**, and **Filter** Billing Records by Date Range and/or Billing Code.

ID:	A system-generated field containing the system's unique ID for this particular Billing Record.
Created:	The date the Billing Record was created.
Billing Code:	The Billing Record's Billing Code.
Billing Strategy:	The Billing Record's Billing Strategy.
Amount:	The Billing Record's Quantity.
UOM:	The Base UOM for the Billing Record.
Rate:	The Rate for the Billing Record.
Minimum Charge:	The Minimum Charge for the Billing Record.
Total:	The Total of the Billing Record.
Invoiced:	The Invoiced part of the Billing Record.
Owner:	The Owner for the Billing Record.
Project:	The Project for the Billing Record.
Details:	The Details for the Billing Record.

Notes:	Any Notes for the Billing Record.
Cancelled:	An indication of whether or not the Billing Record has been cancelled.
Cancelled Reason Code:	For cancelled Billing Records, the Reason Code selected when the Billing Record was cancelled.

Contacts

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

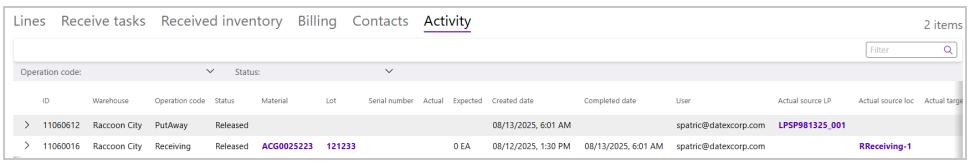


Contacts Information

Type:	The Type of Contact for the Inbound 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.
State:	The State of the Contact.
Postal Code:	The Postal Code of the Contact.
Country:	The Country of the Contact.
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.

Activity

The **Activity** tab displays the Inbound Order's Activity in the Warehouse, including the Material, User, Completed Date and more.



Activity Information

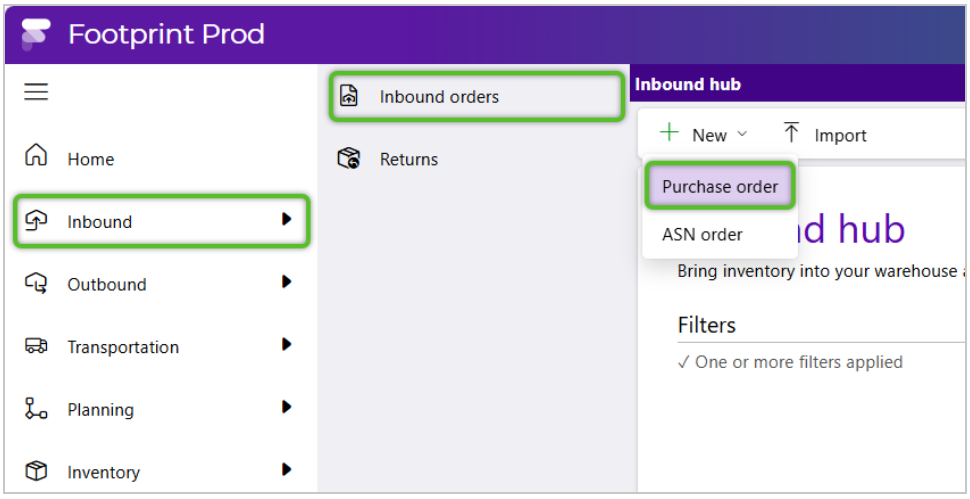
ID:	A system-generated field containing the system's unique ID for this particular Activity.
Warehouse:	A system-generated field containing the Warehouse where the Activity for the Inbound Order took place.
Operation Code:	The Activity's Operation Code.
Status:	The Status of the Activity.
Material:	The 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 Base UOM for the Activity.
Expected:	The Expected Base UOM for the Activity.
Created Date:	The date the Activity was created.
Completed Date:	The date the Activity was completed.
User:	The logged in User who performed the Activity.
Actual Source LP:	The Actual Source License Plate in the Activity.
Actual Source Loc:	The Actual Source Location in the Activity.
Actual Target LP:	The Actual Target License Plate in the Activity.
Actual Target Loc:	The Actual Target Location in the Activity.
Expected Source LP:	The Expected Source License Plate in the Activity.
Expected Source Loc:	The Expected Source Location in the Activity.
Expected Target LP:	The Expected Target License Plate in the Activity.
Expected Target Loc:	The Expected Target Location in the Activity.
Notes:	Any Notes added to the Activity.

Inbound Process

The Inbound Process is comprised of placing an Order, Receiving that Order's Shipments when they arrive, the Putaway of the Received Materials into their storage Locations in the Warehouse, and Completing the Order so all necessary information is sent to Billing.

Step 1. Create an Inbound Order

In creating an Inbound Order, you specify what Materials you're bringing in, what Owners they belong to, how they're getting to your Warehouse, and so on. ASN Orders also allow you to specify the exact License Plates that you will be Receiving.



In addition to being able to **Create an Inbound (Purchase) Order** and **Create an ASN Order**, the Inbound Hub also allows you to **Import Inbound Orders**. You can also **Copy an Order** when you have it open for management.

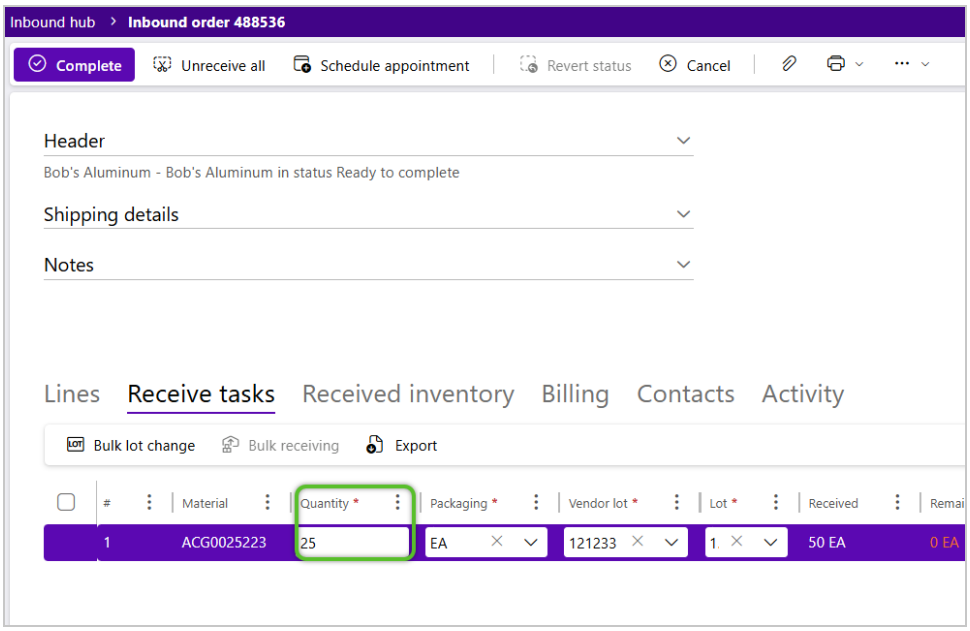
Related Tutorials

- **How to Create an Inbound Order**
- **How to Create an ASN Order**
- **How to Import Inbound Orders**
- **How to Create an Inbound Load Container**

Once created, all the Order information can be managed from the Inbound Hub.

Step 2. Receive an Inbound Order

Receiving is the process of confirming what was Ordered has arrived in the Warehouse. The Materials will be assigned to License Plates, given Lot and weight information, and when necessary, Serial Numbers.



Related Tutorials

- How to Receive Inventory
- How to Auto-Receive an ASN Order
- How to Unreceive or Adjust Inventory

Step 3. Putaway an Inbound Order

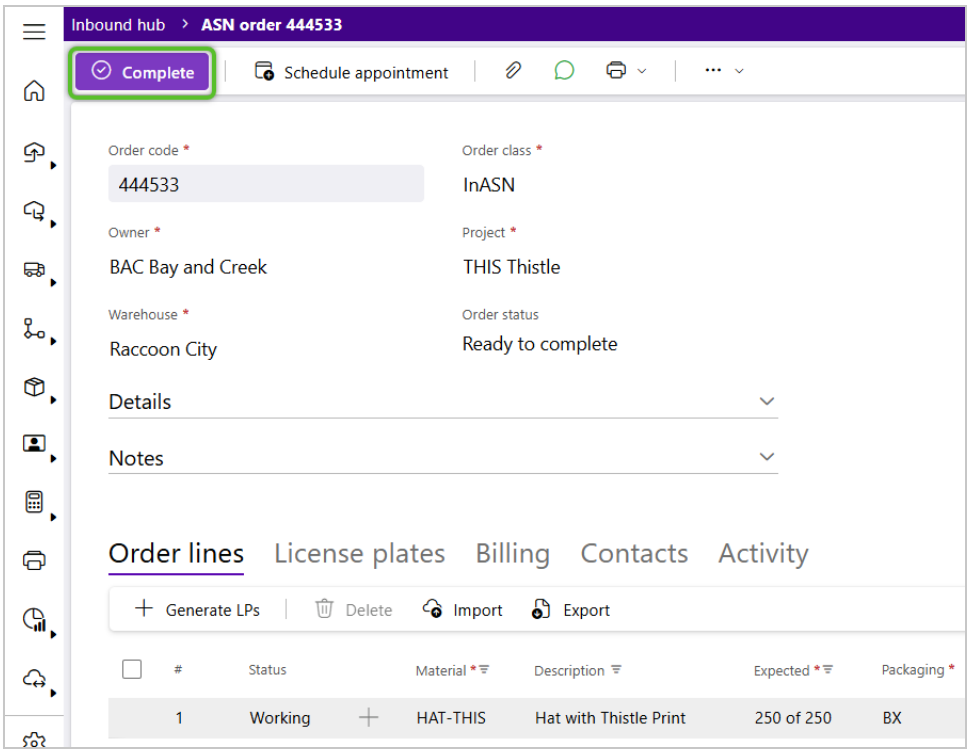
The Putaway process is simply moving the new Inventory from the Receiving Location to its new storage Location inside the Warehouse using a mobile device.

For more details on mobile putaway, please visit our mobile **Putaway Guide**.

Step 4. Complete an Inbound Order

Completing the Order is the final sendoff in the Inbound process. This is where a user confirms that everything in the process has transpired properly, then closes out the Order, sending information to Billing.

For more details on completing an inbound order, please visit our **How to Complete an Inbound Order** article.



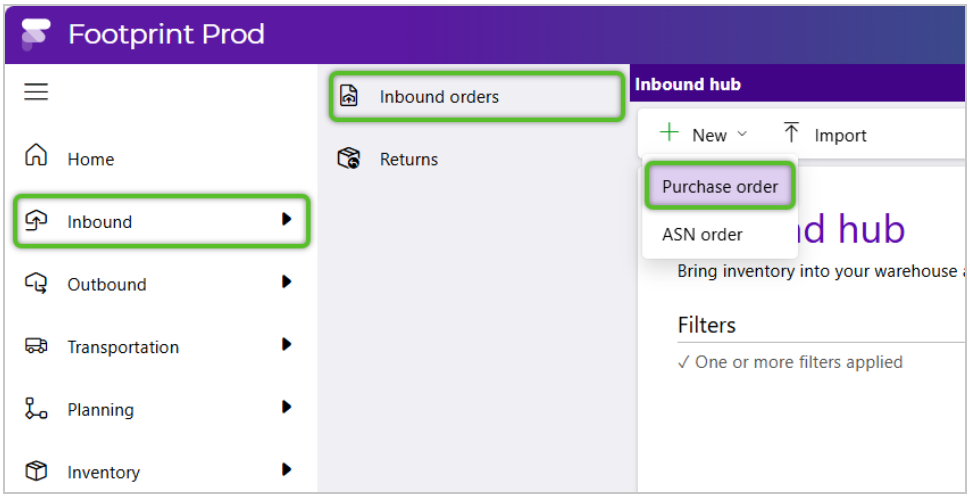
Create an Inbound Order

Purchase Orders are the beginning of the process to bring inventory into the Warehouse. This Inbound Order specifies what you want, how much of it you want, who you want it from, and how you are going to get it. Once created, the Order can be managed from the Inbound Hub. Inbound Orders can also be **imported**, copied, or created via configured EDI integrations.

1. From the **Inbound Hub**, click the option to **+ Create Purchase Order**.

Tip

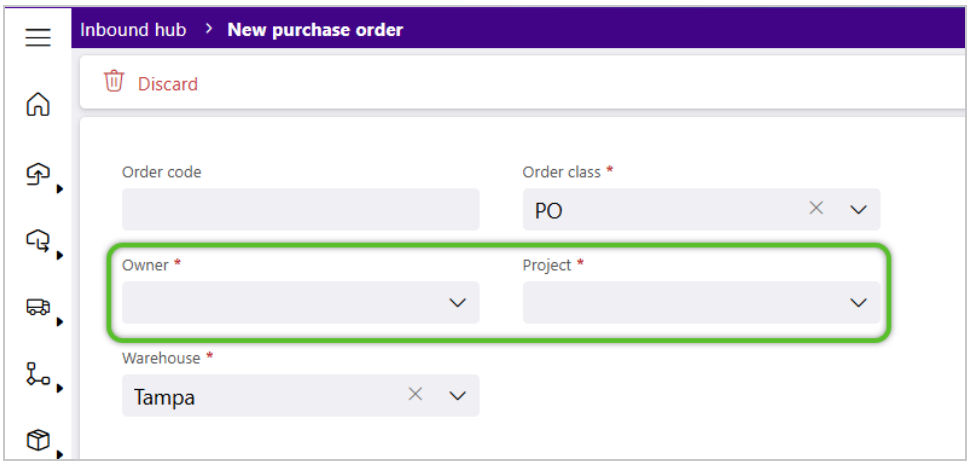
Values already selected in the Inbound Hub Filters, such as Owner, Project, or Warehouse will auto-populate. Otherwise, the Warehouse field populates based on the user's Default Warehouse.



The **Lookup** will populate an Order number upon creation, unless otherwise specified, and the **Order Class** defaults to PO.

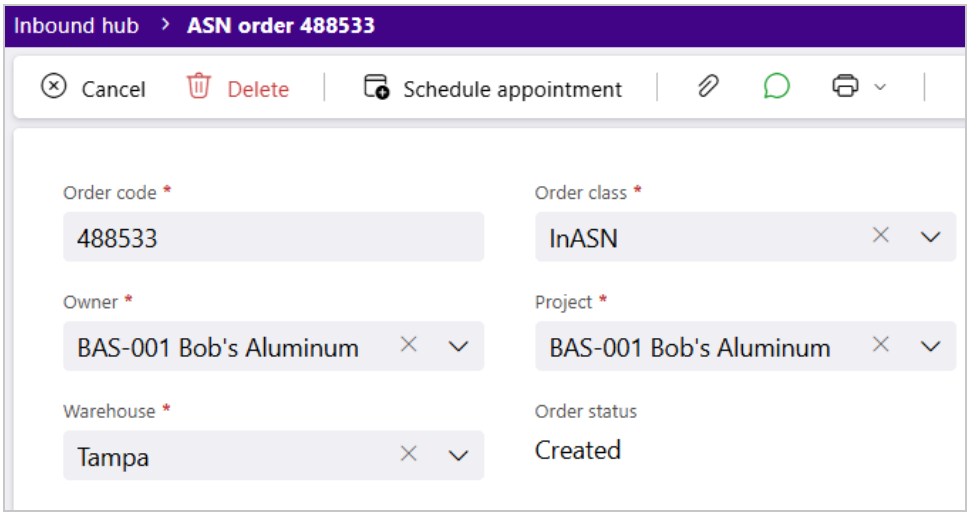
2. Select the required **Owner** of the Materials that will be coming.

3. Select the required **Project** for the Materials and tab out of the field to create the new Inbound Order.

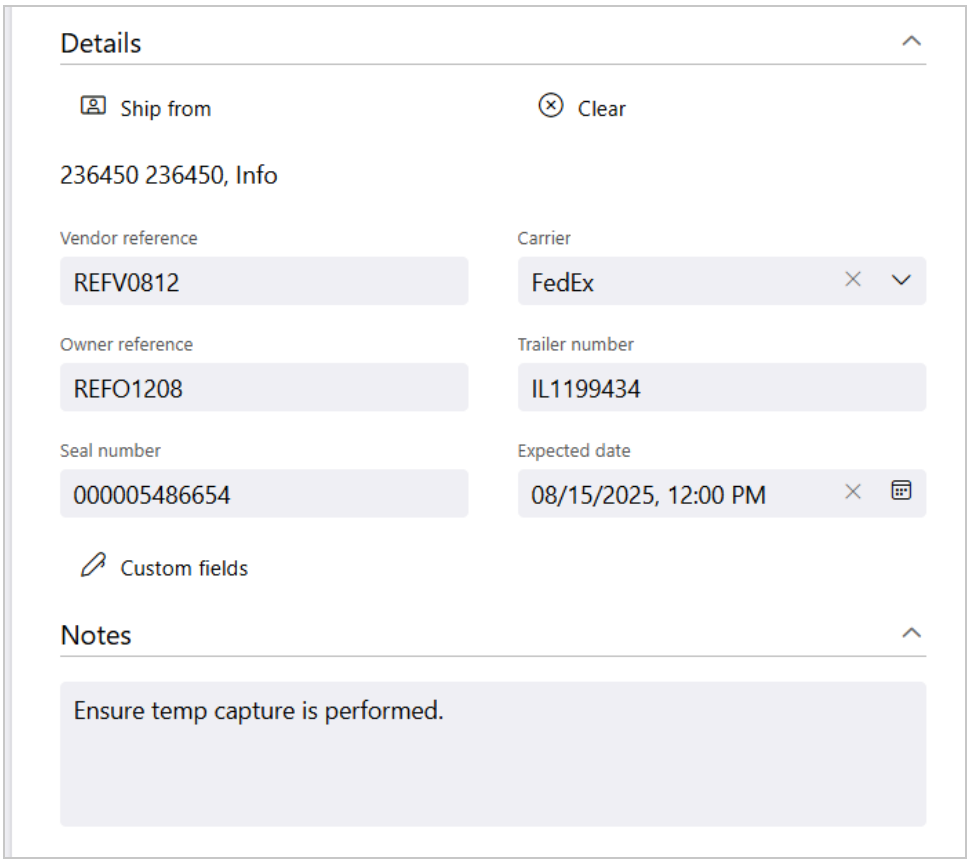


4. To enter optional information about the vendor from whom you are ordering, click to open the **Details** dropdown.

Inbound Order Details



Lookup: The Lookup Number for the Order.
Order Class: The Order Class the Order has been assigned to.
Owner: The Name of the Owner for whom the Order was created.
Project: The Name of the Project associated with the Order.
Warehouse: The Warehouse where the Order was Created.
Order Status: The current Status of the Order.



Ship From: The Ship From Address for the Order.

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.

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

Trailer Number: The Trailer Number for the Order.

Seal Number: The Seal Number for the Order.

Notes: Any Notes for the Order.

Custom Fields: Specific to your organization.

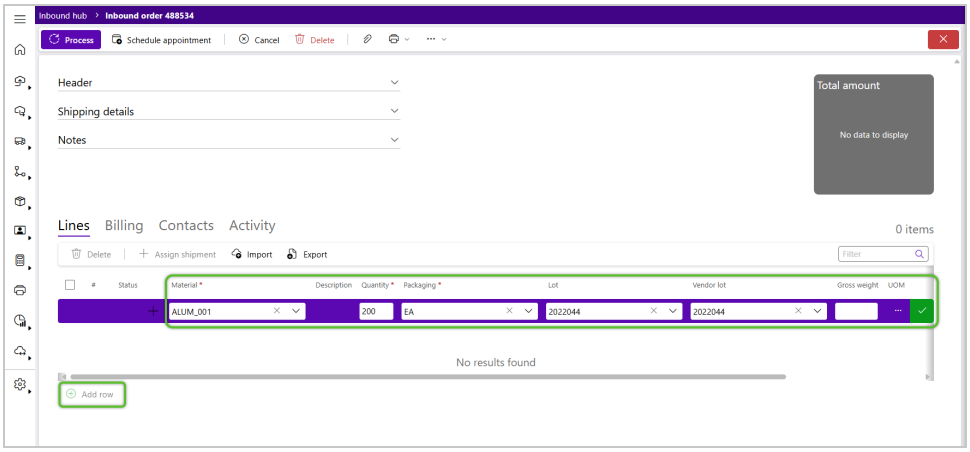
5. Click the green **+ Add Row** option at the bottom of the **Lines** tab to begin specifying the inventory to Receive.

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

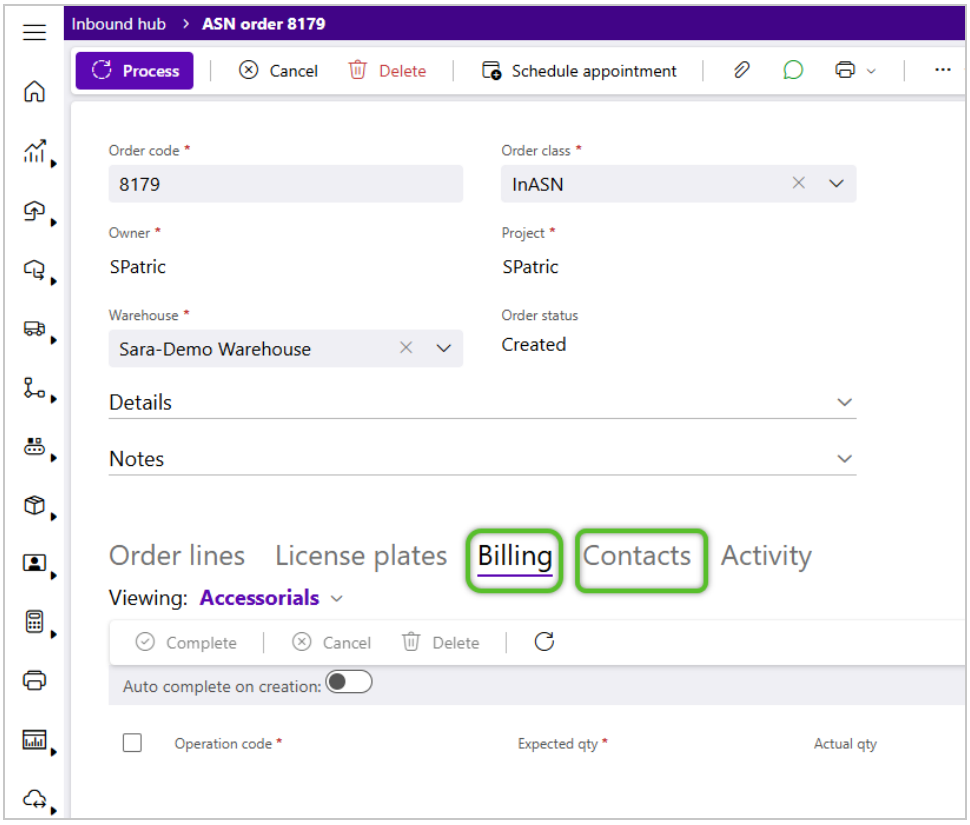
7. Select the correct **Packaging** and enter the required **Quantity**.

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

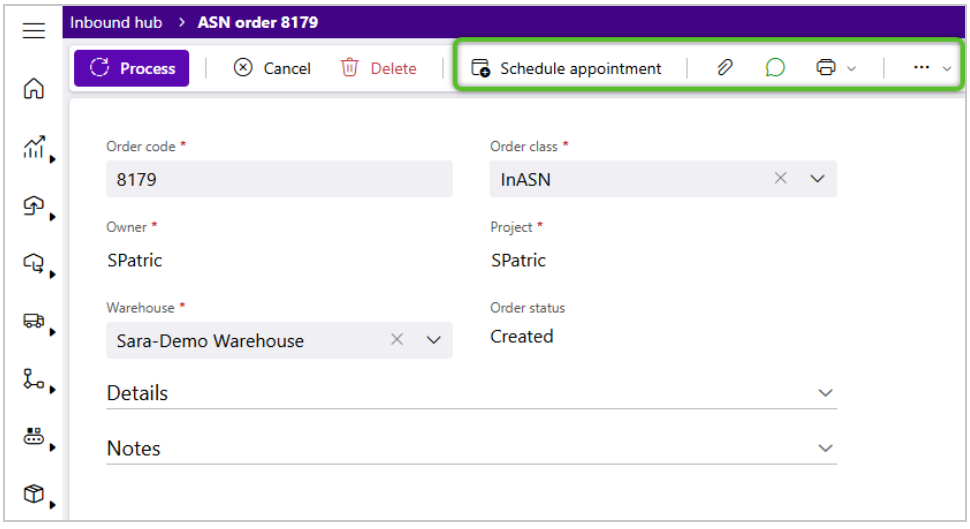
Repeat steps 5-8 to add more order Lines.



9. Click the **Billing** tab to add charges, and/or the **Contacts** tab to add contacts.



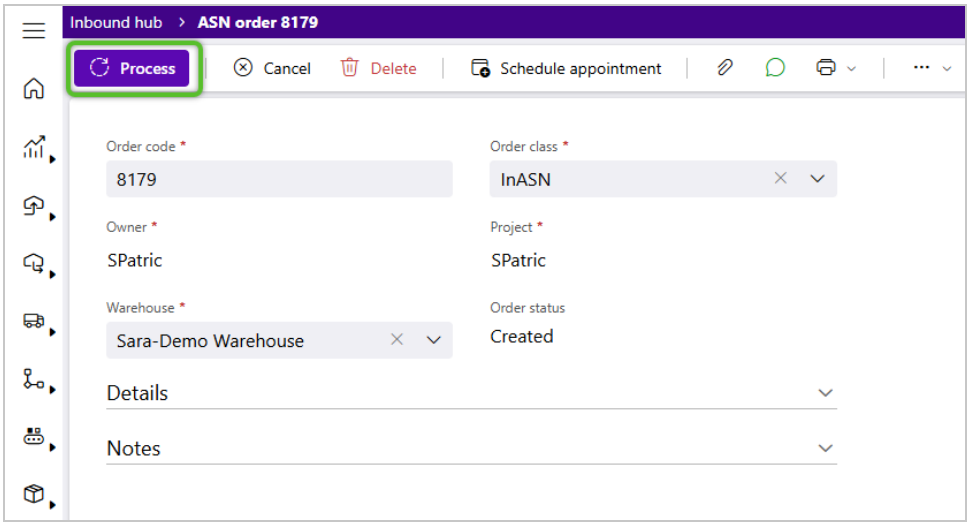
10. Use the Order Toolbar options to **Add a Dock Appointment**, **Add Attachments**, **Add Comments**, **Copy the Order**, and so on.



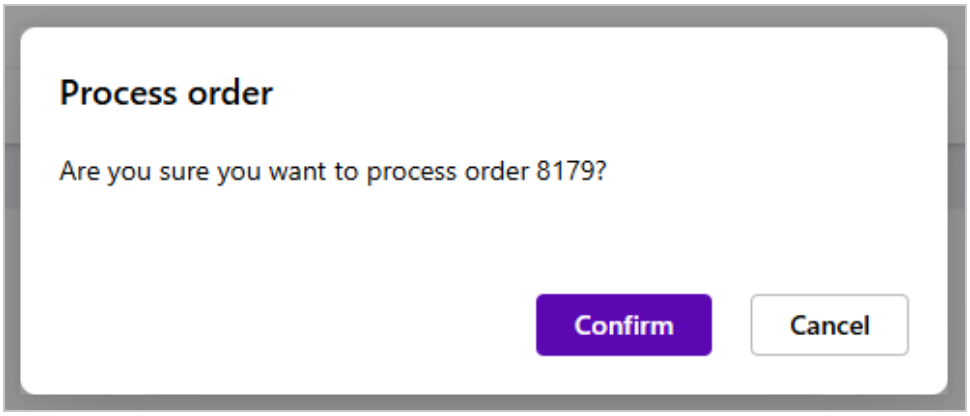
11. Finally, when Receiving for the order may begin, click the **Process** option in the Order Toolbar.

Note

To Process and Inbound Order, a Default Receiving Location must be set.



12. Review the details in the **Process Order** window, then click the **Confirm** button.



Now that you've created and processed the new Inbound Order, Receiving can begin and the order can be managed as needed from the Inbound Hub.

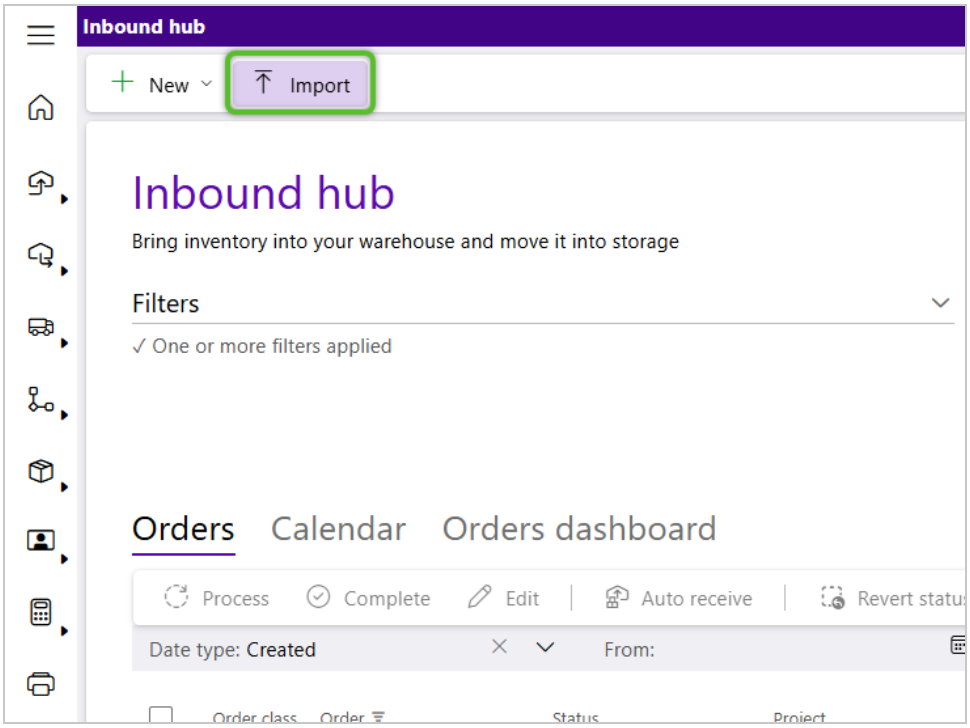
Import Inbound Orders

Imported Inbound Orders will appear alongside other inbound orders in Footprint for review and management purposes.

Please Note

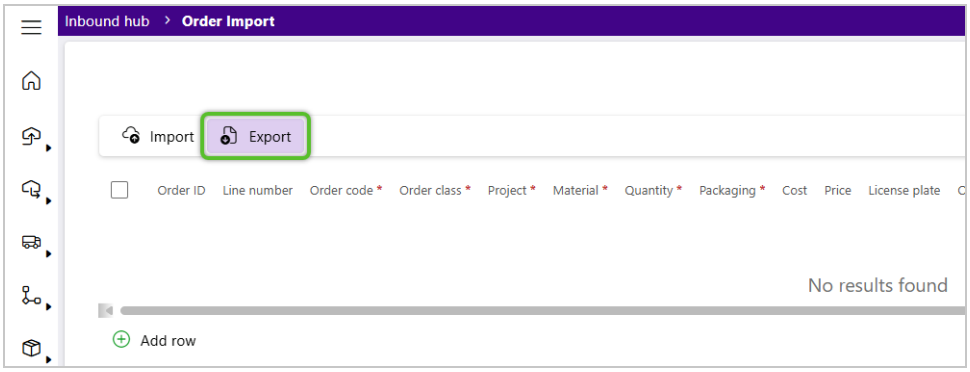
- For the most comprehensive import, we recommend downloading the latest export file with up-to-date features and fields.
- The import process is intended for creating new records. Enter as many details as possible when importing, as attempting to update existing records will result in an error.
- All 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 **Inbound Hub**, click the option to **Import Orders**.



2. Click the **Export** option at the top of the **Inbound Order Import** page.

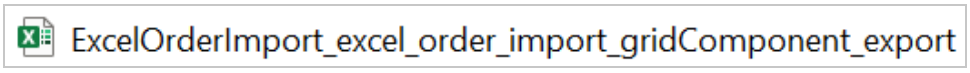
The import order template file will be downloaded to the user's default download location.



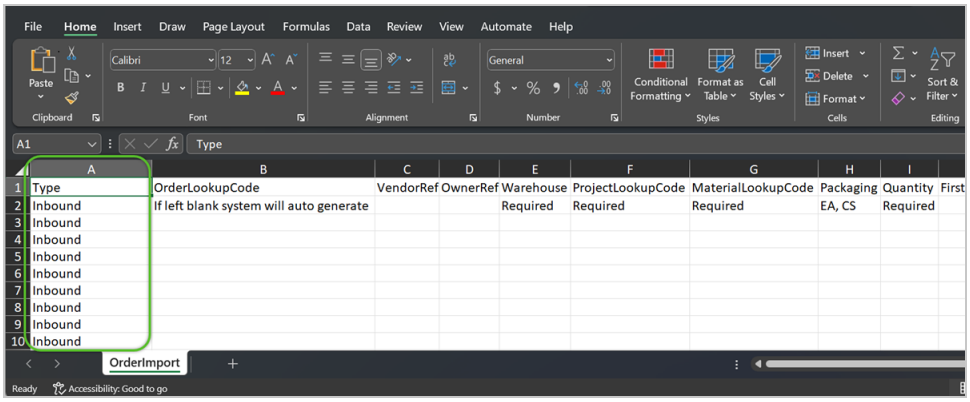
3. Locate the file named '**ExcelOrderImport_excel_order_import_gridComponent_export**' and double click on it to open it.

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.



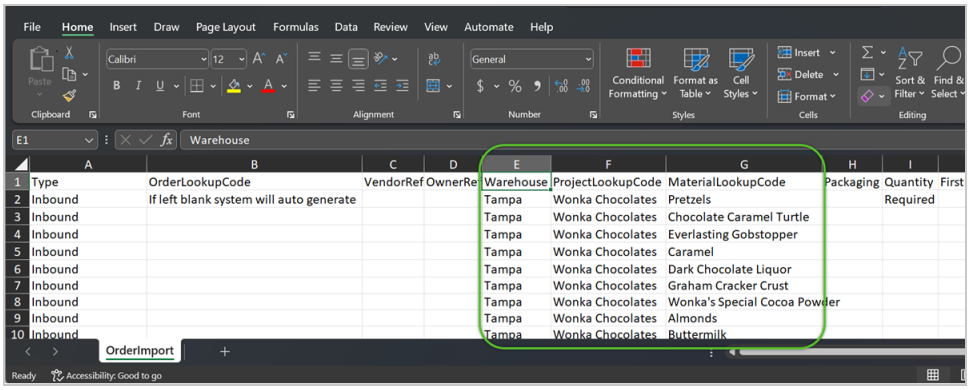
4. In required column A, indicate that the order is **Inbound**.



5. In required columns E, F, and G, indicate the **Warehouse**, **ProjectLookupCode**, and **MaterialLookupCode**(s).

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** fields in Footprintor an error will occur when importing.

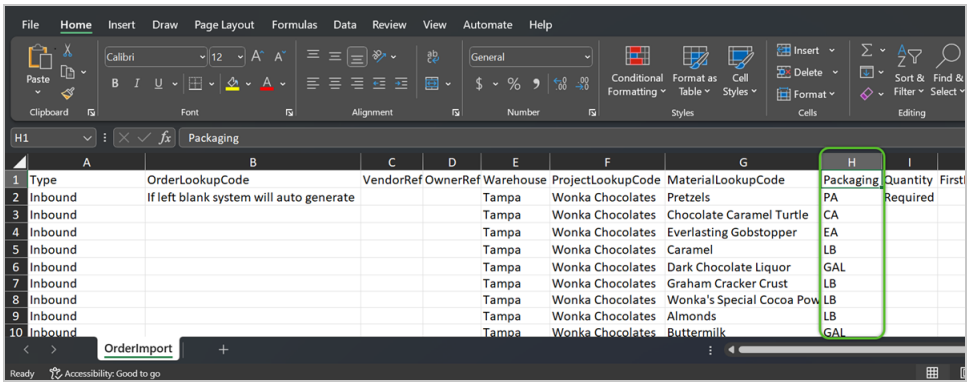


	A	B	C	D	E	F	G	H	I
1	Type	OrderLookupCode	VendorRef	OwnerRe	Warehouse	ProjectLookupCode	MaterialLookupCode	Packaging	Quantity	First
2	Inbound	If left blank system will auto generate			Tampa	Wonka Chocolates	Pretzels		Required	
3	Inbound				Tampa	Wonka Chocolates	Chocolate Caramel Turtle			
4	Inbound				Tampa	Wonka Chocolates	Everlasting Gobstopper			
5	Inbound				Tampa	Wonka Chocolates	Caramel			
6	Inbound				Tampa	Wonka Chocolates	Dark Chocolate Liquor			
7	Inbound				Tampa	Wonka Chocolates	Graham Cracker Crust			
8	Inbound				Tampa	Wonka Chocolates	Wonka's Special Cocoa Powder			
9	Inbound				Tampa	Wonka Chocolates	Almonds			
10	Inbound				Tampa	Wonka Chocolates	Buttermilk			

6. In required column H, select the specific type of **Packaging** for each material.

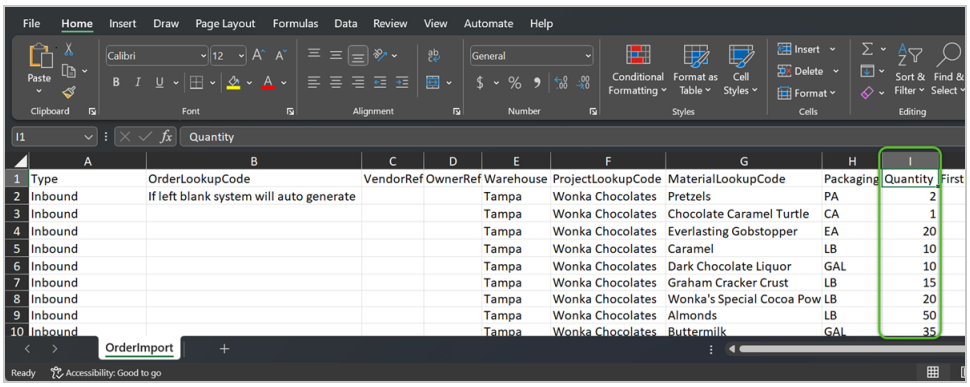
Important

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



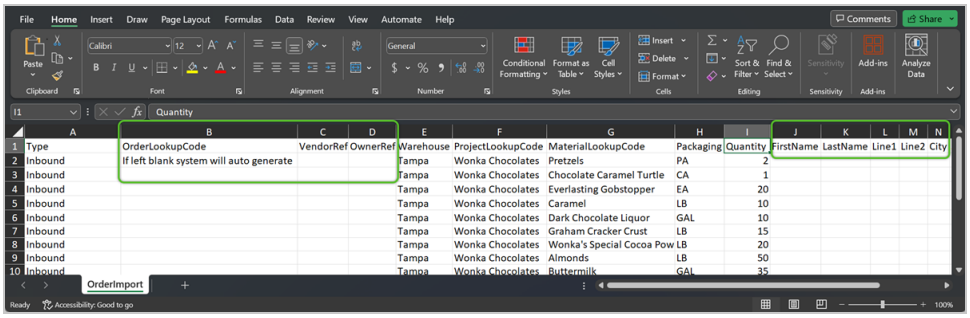
	A	B	C	D	E	F	G	H	I
1	Type	OrderLookupCode	VendorRef	OwnerRef	Warehouse	ProjectLookupCode	MaterialLookupCode	Packaging	Quantity
2	Inbound	If left blank system will auto generate			Tampa	Wonka Chocolates	Pretzels	PA	Required
3	Inbound				Tampa	Wonka Chocolates	Chocolate Caramel Turtle	CA	
4	Inbound				Tampa	Wonka Chocolates	Everlasting Gobstopper	EA	
5	Inbound				Tampa	Wonka Chocolates	Caramel	LB	
6	Inbound				Tampa	Wonka Chocolates	Dark Chocolate Liquor	GAL	
7	Inbound				Tampa	Wonka Chocolates	Graham Cracker Crust	LB	
8	Inbound				Tampa	Wonka Chocolates	Wonka's Special Cocoa Pow	LB	
9	Inbound				Tampa	Wonka Chocolates	Almonds	LB	
10	Inbound				Tampa	Wonka Chocolates	Buttermilk	GAL	

7. In required column I, enter the **Quantity** of each material listed.

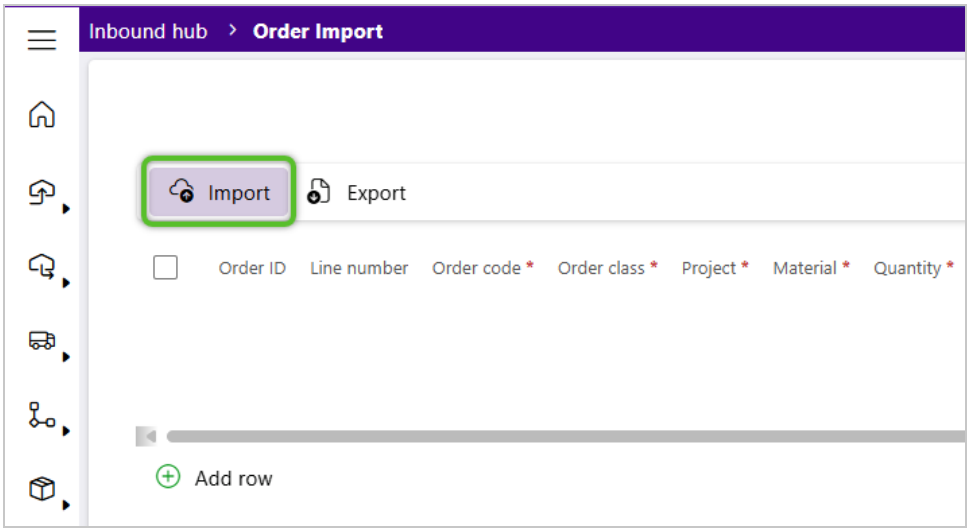


	A	B	C	D	E	F	G	H	I
1	Type	OrderLookupCode	VendorRef	OwnerRef	Warehouse	ProjectLookupCode	MaterialLookupCode	Packaging	Quantity
2	Inbound	If left blank system will auto generate			Tampa	Wonka Chocolates	Pretzels	PA	2
3	Inbound				Tampa	Wonka Chocolates	Chocolate Caramel Turtle	CA	1
4	Inbound				Tampa	Wonka Chocolates	Everlasting Gobstopper	EA	20
5	Inbound				Tampa	Wonka Chocolates	Caramel	LB	10
6	Inbound				Tampa	Wonka Chocolates	Dark Chocolate Liquor	GAL	10
7	Inbound				Tampa	Wonka Chocolates	Graham Cracker Crust	LB	15
8	Inbound				Tampa	Wonka Chocolates	Wonka's Special Cocoa Pow	LB	20
9	Inbound				Tampa	Wonka Chocolates	Almonds	LB	50
10	Inbound				Tampa	Wonka Chocolates	Buttermilk	GAL	35

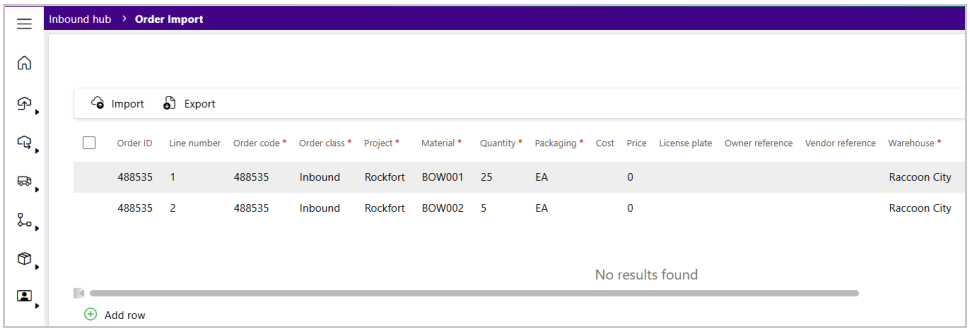
8. When possible, enter the optional details for each order, keeping mind that the Import process is not intended for future data updates.



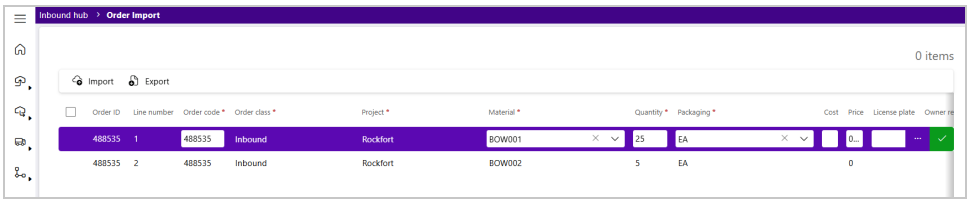
9. Save and close the spreadsheet, then click **Import** in the toolbar to select the file for upload.



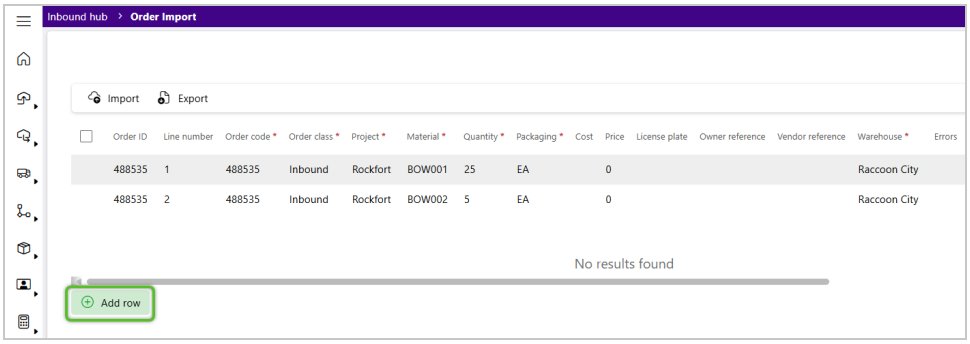
The order details will display for review and edits.



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



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



The newly imported inbound orders will display alongside other orders in the Inbound Hub.

Create an Inbound Dock Appointment

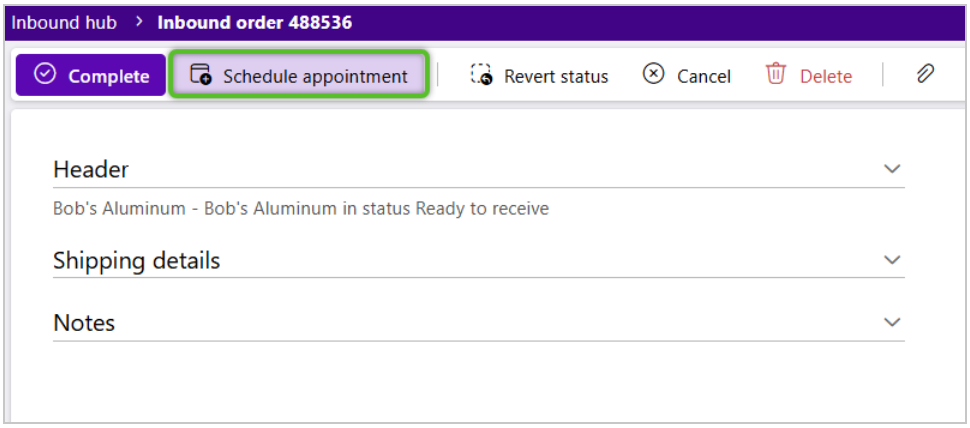
Dock Appointments allow you to schedule Shipments to your Dock Doors. Inbound Dock Appointments can be created within Inbound Orders, from the Inbound Hub, from an Inbound Load Container, or from the Dock Appointments Hub. Regardless of where the Inbound Dock Appointment is created, the (following) steps are the same.

Prerequisites

- Dock Door

From the Inbound Order

1. Click the **Schedule appointment** option in the top Inbound Order toolbar.



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

2. Select a **Scheduled Dock Door**.

> **Note**
>
> Dock Appointments with no Dock Door will show as "**Unassigned**" for the scheduled date and time instead of a specific Dock Door.

3. Update the **Scheduled Arrival** and **Scheduled Departure** times, populated based on the current time.

4. Select the **Owner** and **Project**.

5. Search for and select the Inbound **Order** for the Dock Appointment.

These fields will already be populated when the Dock Appointment is created from an Inbound Order or an Inbound Load Container with these details included.

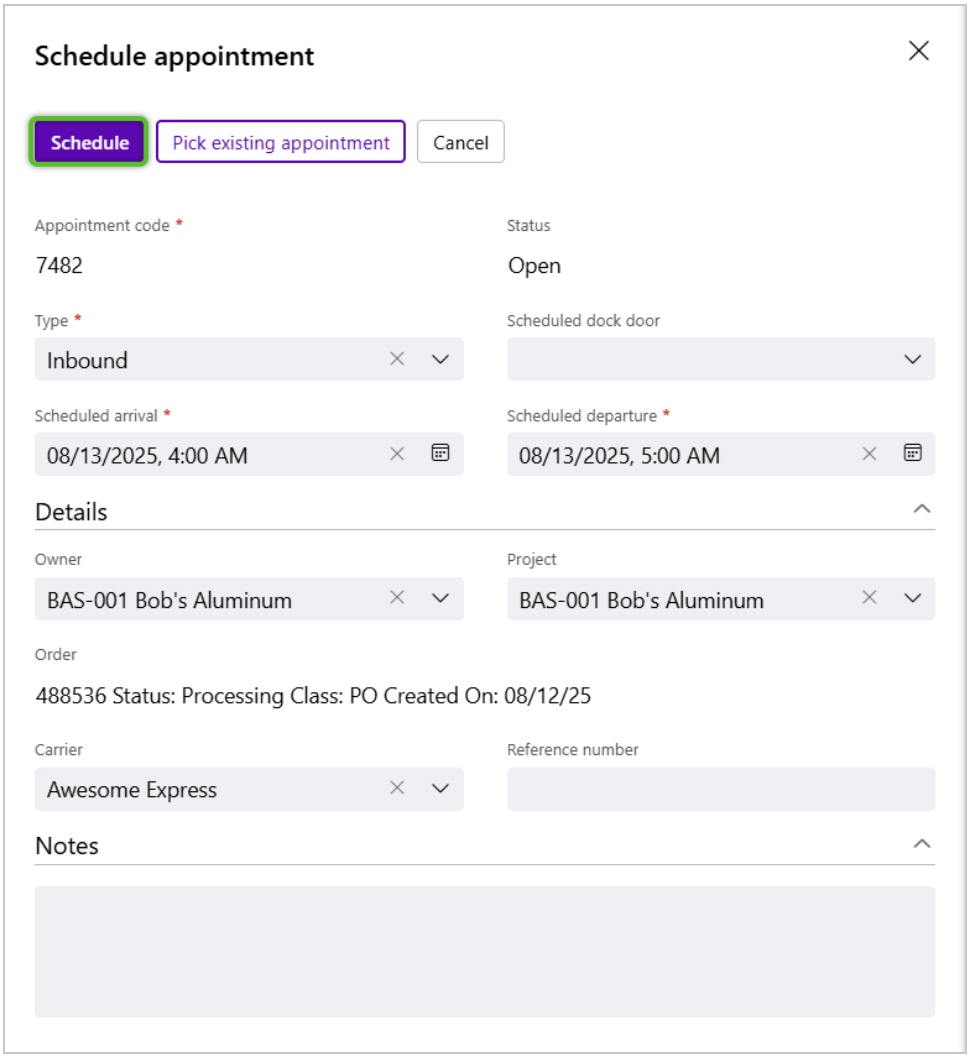
6. Enter the **Carrier** and **Reference Number** when needed.

7. Once all fields have been set to desired values, click the **Schedule** button in the top left corner.

The Dock Appointment will display in the top Inbound Order toolbar, as well as in the Inbound Hub and the Dock Appointments Hub.

Tip

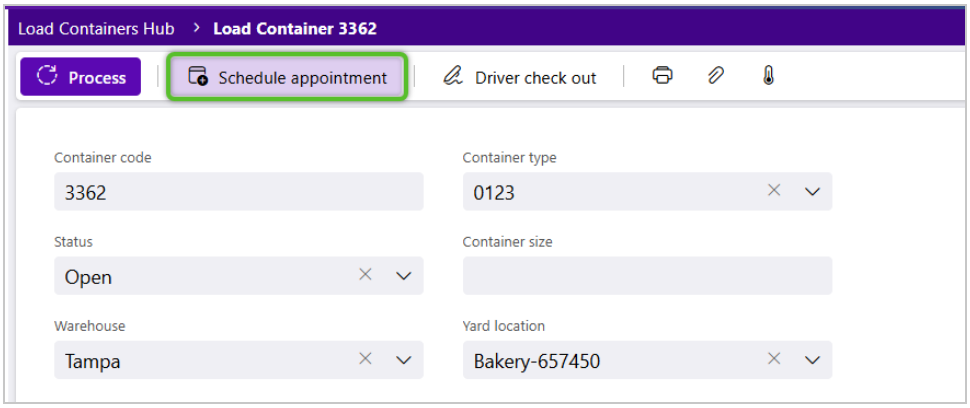
On the **Calendar** tab, drag & drop **Unassigned** Appointment cards from the box along the right directly to a Dock Door time slot on the Calendar.



Dock Appointments can be rescheduled by opening it again, or just by dragging and dropping it to a new time slot on the Calendar.

From the Inbound Load Container

1. Click the **Appointment** option in the top Load Container toolbar.



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

2. Select a **Scheduled Dock Door**.

> **Note**
>
> Dock Appointments with no Dock Door will show as "**Unassigned**" for the scheduled date and time instead of a specific Dock Door.

3. Update the **Scheduled Arrival** and **Scheduled Departure** times, populated based on the current time.

4. Select the **Owner** and **Project**.

5. Search for and select the Inbound **Order** for the Dock Appointment.

These fields will already be populated when the Dock Appointment is created from an Inbound Order or an Inbound Load Container with these details included.

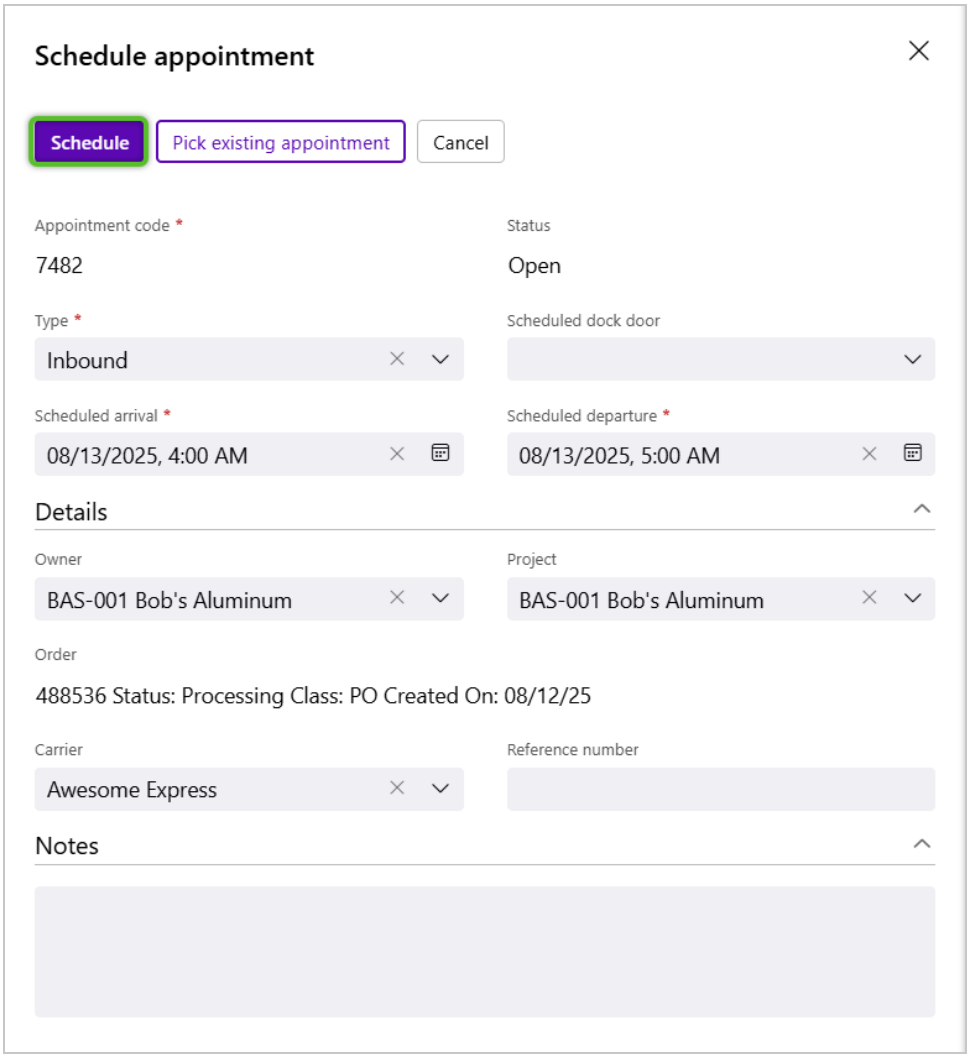
6. Enter the **Carrier** and **Reference Number** when needed.

7. Once all fields have been set to desired values, click the **Schedule** button in the top left corner.

The Dock Appointment will display in the top Inbound Order toolbar, as well as in the Inbound Hub and the Dock Appointments Hub.

Tip

On the **Calendar** tab, drag & drop **Unassigned** Appointment cards from the box along the right directly to a Dock Door time slot on the Calendar.

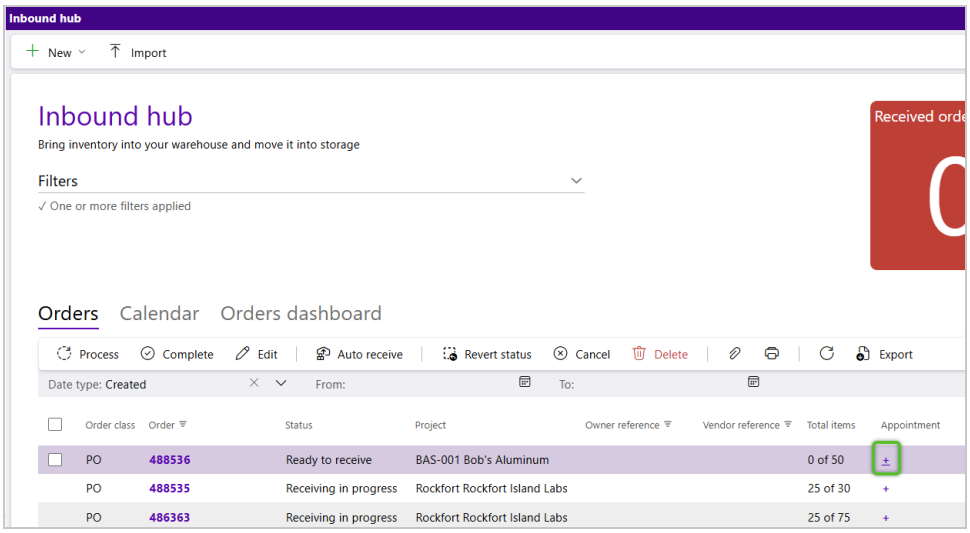


Dock Appointments can be rescheduled by opening it again, or just by dragging and dropping it to a new time slot on the Calendar.

From the Inbound Hub

1. Locate the Inbound Order in the **Orders** tab, then click the blue **+** plus in that row to create the Dock Appointment.

Users can also click the **Calendar** tab to create the Dock Appointment directly from the Calendar itself.



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

2. Select a **Scheduled Dock Door**.

Note

Dock Appointments with no Dock Door will show as "**Unassigned**" for the scheduled date and time instead of a specific Dock Door.

3. Update the **Scheduled Arrival** and **Scheduled Departure** times, populated based on the current time.

4. Select the **Owner** and **Project**.

5. Search for and select the Inbound **Order** for the Dock Appointment.

These fields will already be populated when the Dock Appointment is created from an Inbound Order or an Inbound Load Container with these details included.

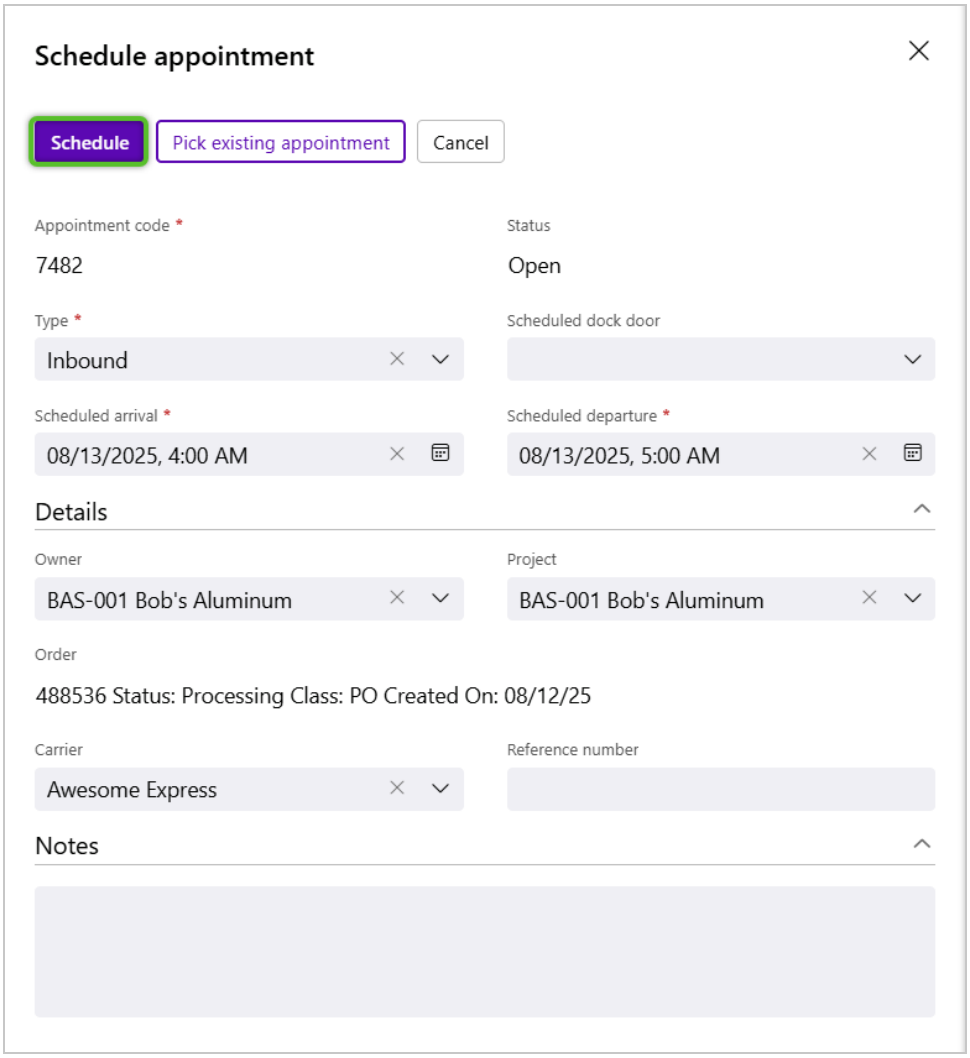
6. Enter the **Carrier** and **Reference Number** when needed.

7. Once all fields have been set to desired values, click the **Schedule** button in the top left corner.

The Dock Appointment will display in the top Inbound Order toolbar, as well as in the Inbound Hub and the Dock Appointments Hub.

Tip

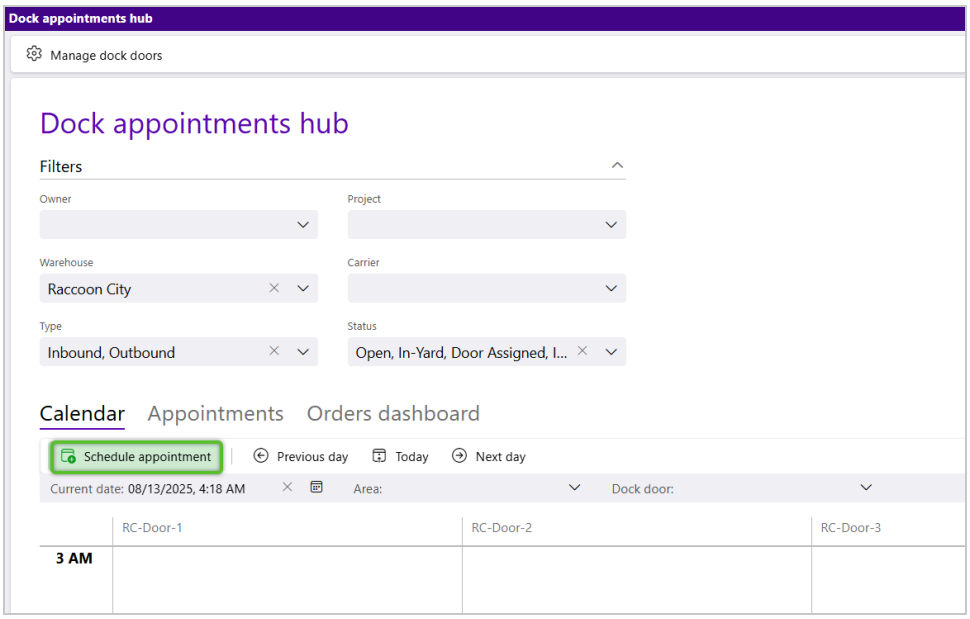
On the **Calendar** tab, drag & drop **Unassigned** Appointment cards from the box along the right directly to a Dock Door time slot on the Calendar.



Dock Appointments can be rescheduled by opening it again, or just by dragging and dropping it to a new time slot on the Calendar.

From the Dock Appointments Hub

1. Click **+ Create Appointment** in the Calendar tab toolbar, or click directly into the time slot in the **Calendar** itself.



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

2. Select a **Scheduled Dock Door**.

Note

Dock Appointments with no Dock Door will show as "**Unassigned**" for the scheduled date and time instead of a specific Dock Door.

3. Update the **Scheduled Arrival** and **Scheduled Departure** times, populated based on the current time.

4. Select the **Owner** and **Project**.

5. Search for and select the Inbound **Order** for the Dock Appointment.

These fields will already be populated when the Dock Appointment is created from an Inbound Order or an Inbound Load Container with these details included.

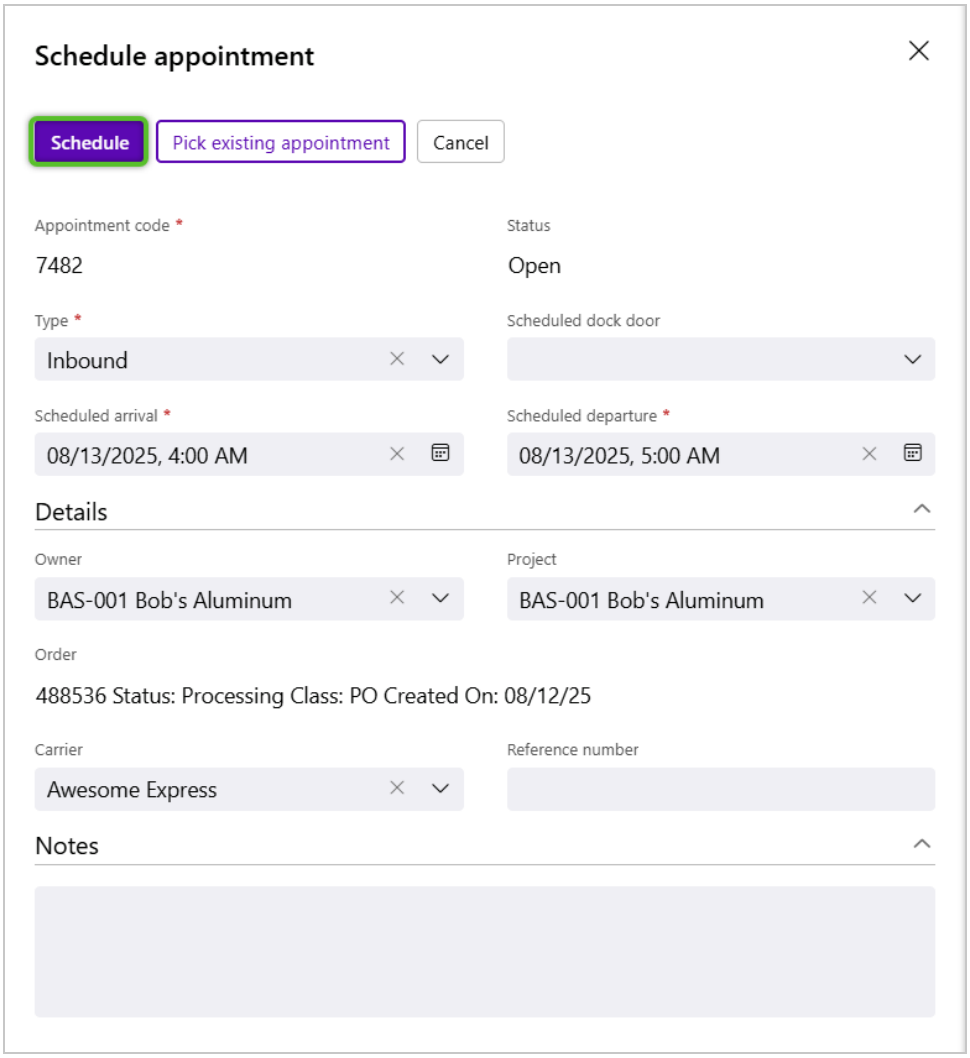
6. Enter the **Carrier** and **Reference Number** when needed.

7. Once all fields have been set to desired values, click the **Schedule** button in the top left corner.

The Dock Appointment will display in the top Inbound Order toolbar, as well as in the Inbound Hub and the Dock Appointments Hub.

Tip

On the **Calendar** tab, drag & drop **Unassigned** Appointment cards from the box along the right directly to a Dock Door time slot on the Calendar.



Dock Appointments can be rescheduled by opening it again, or just by dragging and dropping it to a new time slot on the Calendar.

Receive an Inbound Order

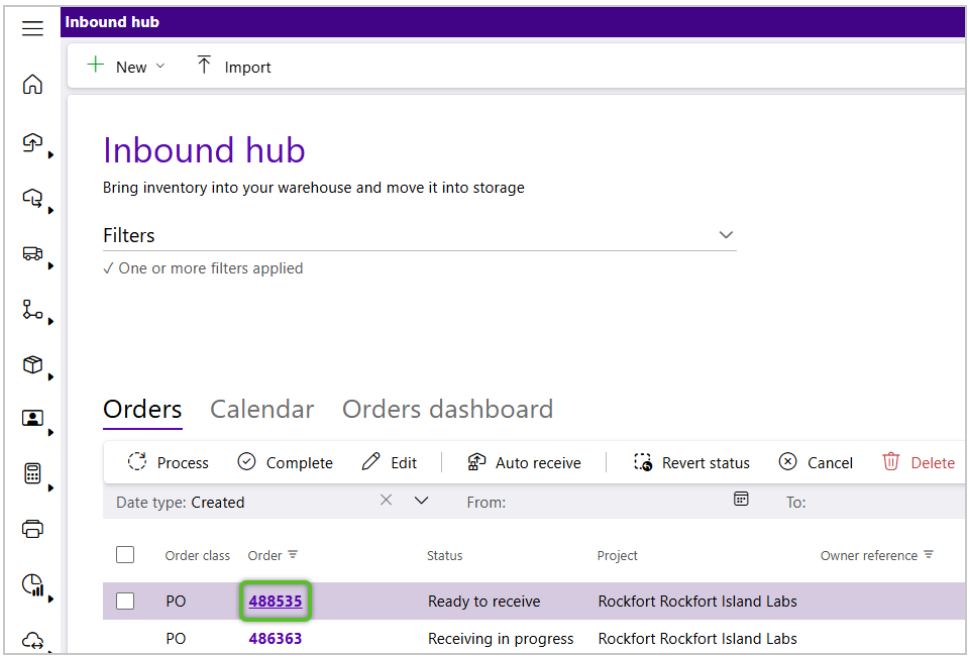
When an Order is Received, the new Inventory is added to the Warehouse, Materials are assigned to License Plates, and Lot information, weight information, Temperatures, and Serial Numbers can be entered. While usually done from a mobile device, orders can also be received from the Inbound Hub.

1. From the **Inbound Hub**, locate the order and click on the **Lookup**.

The Order will open, displaying the order details and order Lines.

Note

Orders can only be received when they have the **Created** or **Ready to Receive** status.



2. Click the **Recv Tasks** tab to view the Receive Tasks.

3. Click the **Receive Quantity** field of the Receive Task line and enter the correct number.

Tip

The **Receive Quantity** will populate with expected amount from the related Order Line. If receiving has already started, the quantity populated will reflect what remains of the expected amount.

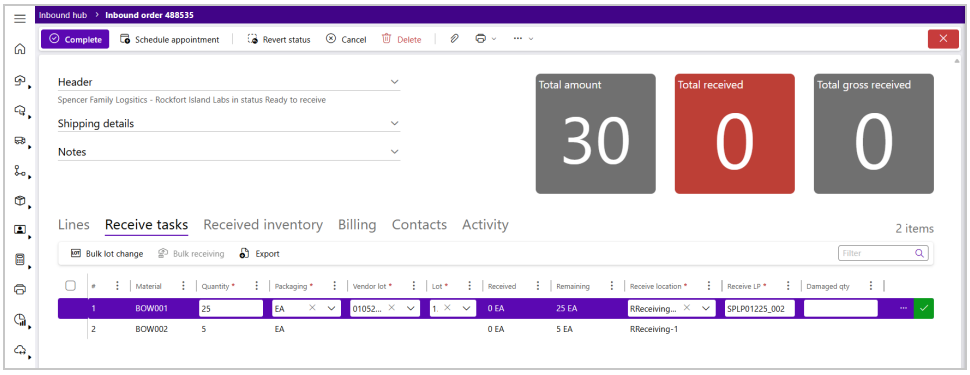
4. Tab through and enter details for **Packaging**, **Damaged Qty**, **Receive Location**, **Receive LP**, **Lot**, and **Vendor Lot**.

If the Material being Received is Lot Controlled, either select an existing Lot from the drop-down menu, or select **Create New Lot** at the bottom to create a new one.

Tip

If receiving less than the expected amount, **Remaining** will display in orange.

5. Click the green checkmark at the end of the row to confirm the Receive Task.



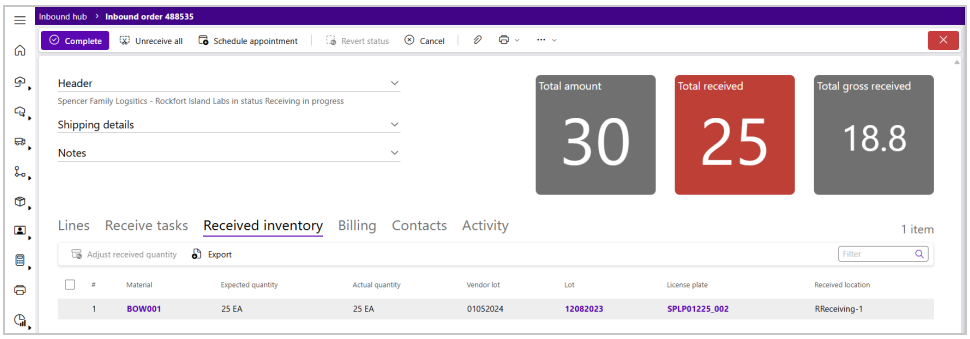
Once confirmed, the Receive Task details will update accordingly.

Multiple receipts can be performed by clicking on the line to activate it, filling out required fields, and confirming again.

Receiving can continue past the expected amount.

All completed Receive Tasks can be viewed on the **Recv Inv** tab.

Material, **License Plate**, and **Lot** are links to their respective pages.



Once you've finished Receiving, your inventory can be **Putaway** using a mobile device.

Unreceive or Adjust Inventory

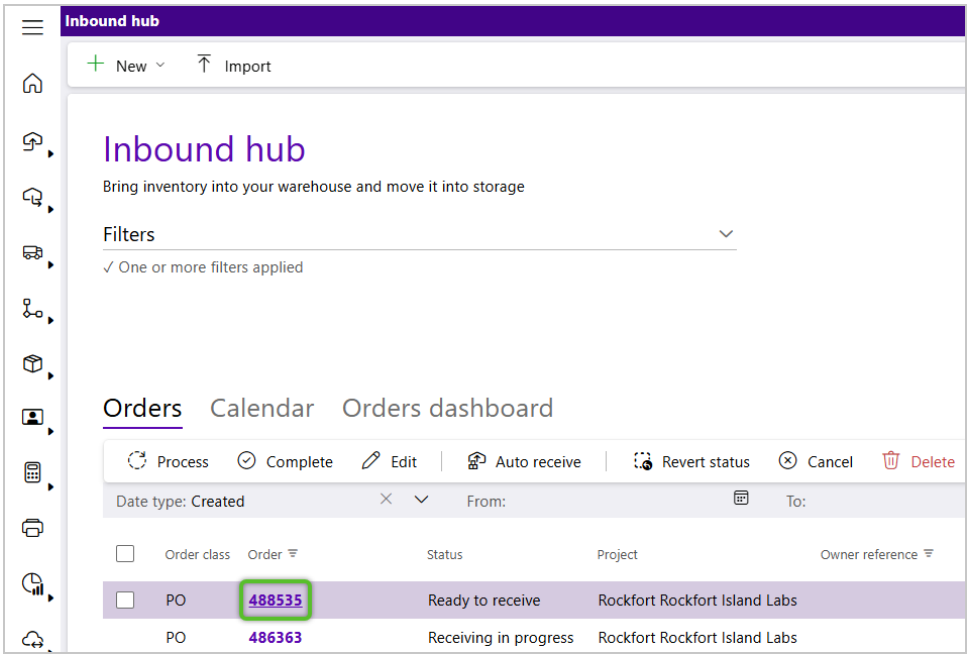
After a receipt has been done, inventory can still be unreceived. Users can choose to unreceive all inventory received, or just a selected amount. This can be done for all Receive Tasks at once or a select one. A Reason Code will be required to complete the action.

Note

Orders can only be unreceived when they have the **Ready to Complete**, **Receiving in Progress**, or **Complete** status.

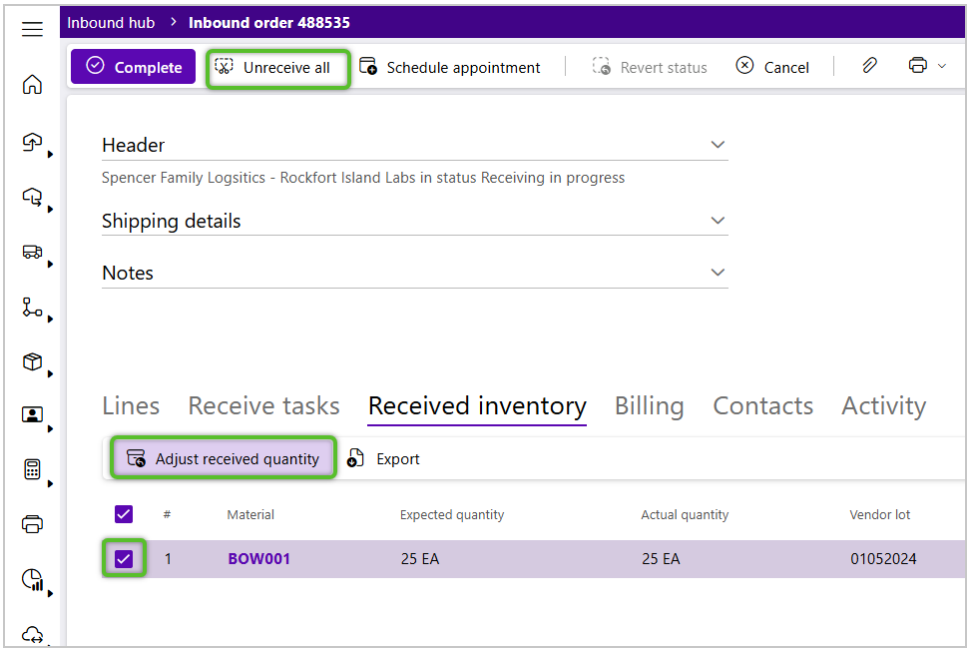
1. From the **Inbound Hub**, locate the Order to be Unreceived and click the **Lookup**.

The Order will open, displaying the order details and order Lines.



2. To unreceive all License Plates in the order, click the **Unreceive All** option in the Order Toolbar along the top of the Order.

To unreceive individual Tasks, click the **Recv Inv** tab, check the box for the row(s) with inventory to be unreceived, then click the **Unreceive** option in the **Recv Inv** tab toolbar.

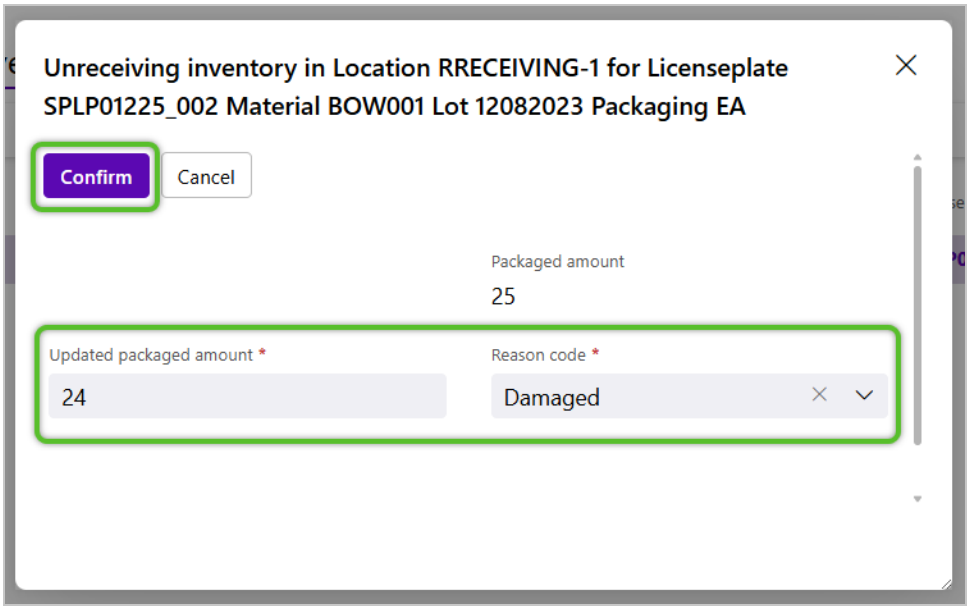


3. In the **Unreceive** confirmation window, enter the **Updated Packaged Amount** (must be less than the Packaged Amount).

When unreceiving all inventory from the selected License Plate, use “0”.

In cases where the amount should be greater than the Packaged Amount, users should instead perform a Receive Task to the License Plate.

4. Select a **Reason Code**, then click the **Confirm** button.



The status of the unreceived order(s) will now be **Ready to Receive**.

Complete an Inbound Order

The final step of the Inbound process is to Complete the Inbound Order, preventing any further changes from being made to it.

1. Click **Inbound** in the left navigation menu, then select **Inbound Orders**.

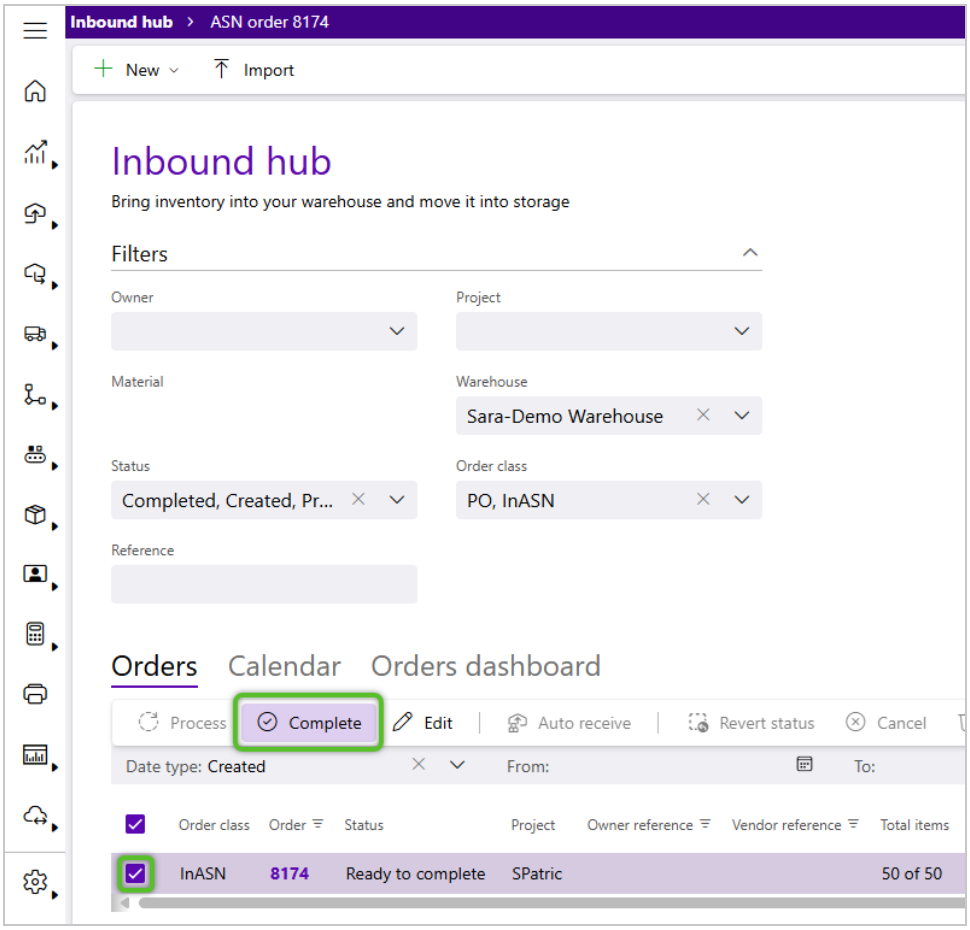
The **Inbound Hub** will display Inbound Orders.

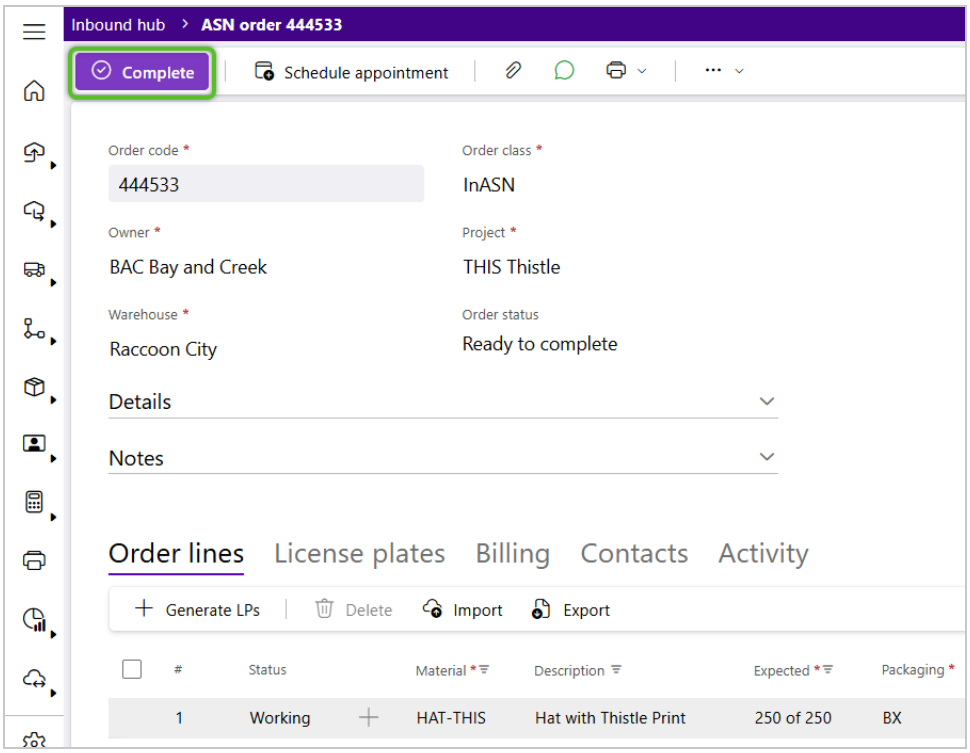
2. Locate the order to complete and check its box, then click the **Complete** option in the **Orders** tab toolbar.

Tip

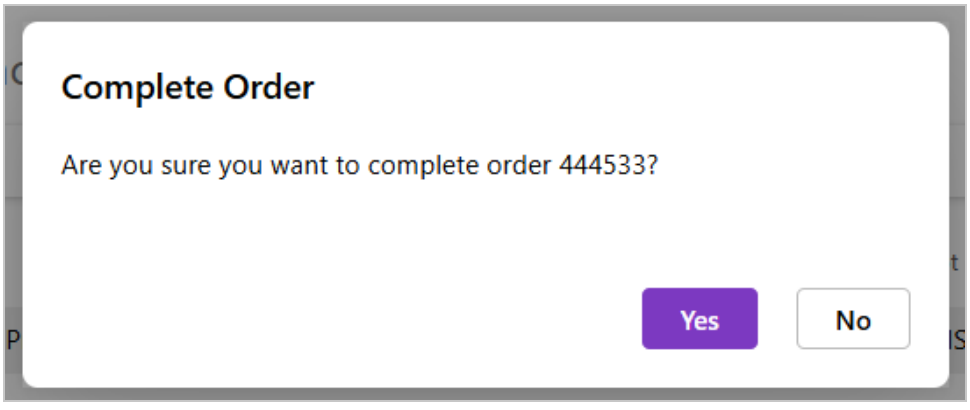
Orders can only be completed when they have the **Created**, **Ready to Receive**, **Ready to Complete**, or **Receiving in Process** status.

To review the details of the order first, click the blue order number, where the **Complete** option is available on the order itself in the Inbound Order toolbar.





3. Review the details are correct in the window displayed, then click the **Yes** button to complete the Order.



The completed order will now appear in the list when filtering for orders with the **Completed** status.

Returns Guide

Sections

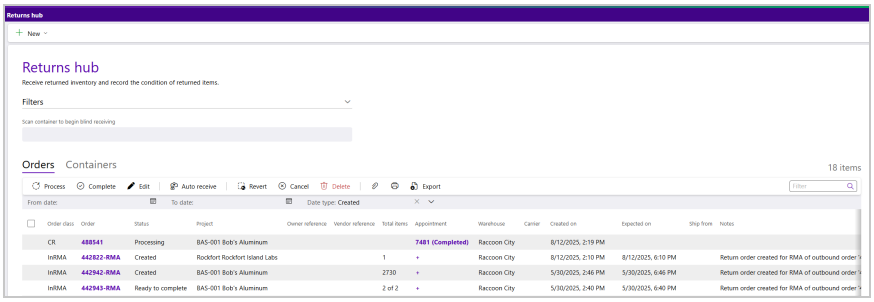
- Overview
- Returns Hub
- Return Order
- Return Process

Overview

A percentage of items shipped are returned back to the warehouse for various reasons. A robust inbound process is being detailed in this document in order to capture all pertinent information during the return of goods, drive billing and provide proper historical tracking for future reference.

Returns Hub

The **Returns Hub** allows users to create and manage all Return Orders based on the receipt of Inventory that was once shipped out of the Warehouse, whether the Return is expected or otherwise. All active Returns are listed, defaulting to the most recent Return Orders at the top.



The **+ New** icon along the top of the Returns Hub allows users to create new Return and Blind Return Orders. For more details, please jump to our **Create a Return** section below.

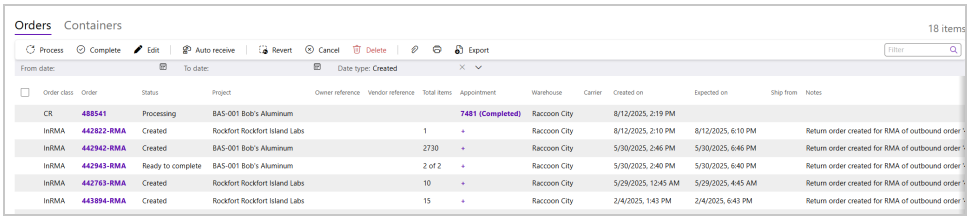
Search and filter options are available to quickly locate Return Orders for review and management. Users can filter by Warehouses, Owner, Project, Statuses, Order Classes, and Reference, and Date ranges for all Date Types (Created, Requested Delivery, Cancel Threshold, Modified, and so on).

Returns Hub Tabs

The Return Orders display in the **Orders** tab, but can also be viewed on the **Containers** tab. Each tab on the Returns Hub displays it's own set of information and options for managing that information. Expand the sections below for more details about each tab.

Orders

The Orders tab lists all Return Orders, with the most recent at the top.



Order Information

Order:	The Order number.
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 received out of the total items expected.
Appointment:	The unique ID number for the Appointment. This link opens the Dock Appointment Editor. The plus icon can be clicked to create a Dock Appointment for the Return Order.
Created:	The date and time the Order was created.
Expected:	The Date the Delivery is Expected by, if specified in the Order's creation.
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.
Warehouse:	The Warehouse where the Order was Created.
Carrier:	The Carrier for the Order's Dock Appointment.
Ship From:	The Ship From Address for the Order.
Notes:	Any Notes for the Order.

Order Tab Toolbar

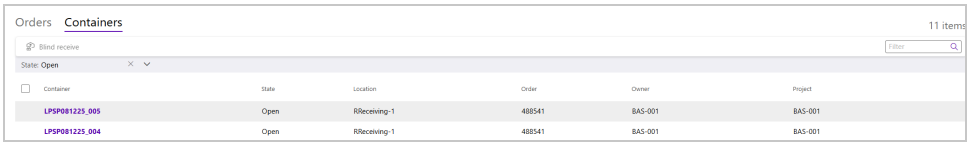
The **Orders** tab toolbar provides options to manage selected Return Orders, such as Update, **Process**, **Auto-Receive**, **Complete**, and more.



Update:	The **Update** option opens the selected Order for further review and updates.
Process:	The **Process** option processes the selected Return Order(s).
Auto-Receive:	The **Auto-Receive** option auto-receives the selected Return Order(s).
Complete:	The **Complete** option completes the selected Order(s).
Cancel:	The **Cancel** option stops selected Order(s) once it's been started.
Revert:	The **Revert** option reverts selected Order(s) from the status of Received or Canceled back to the Created status.
Delete:	The **Delete** icon deletes selected Order(s).
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:	The **Export** option exports the details of the Order in an Excel file (where available).

Containers

The Containers tab displays all the Containers related to Return Orders in the system.

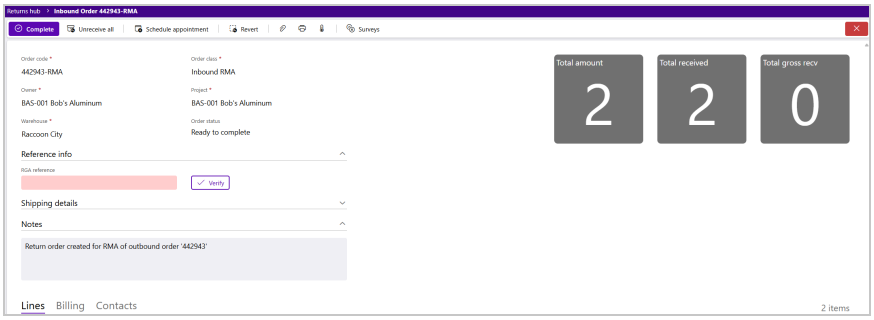


Container Information

Container:	The Container's number.
State:	The State of the Container.
Location:	The current Location of the Container.
Order:	The Container's Order number.
Carrier:	The Carrier delivering the Container.
Owner:	The Owner on the Container's Order.
Project:	The Project on the Container's Order.

Return Order

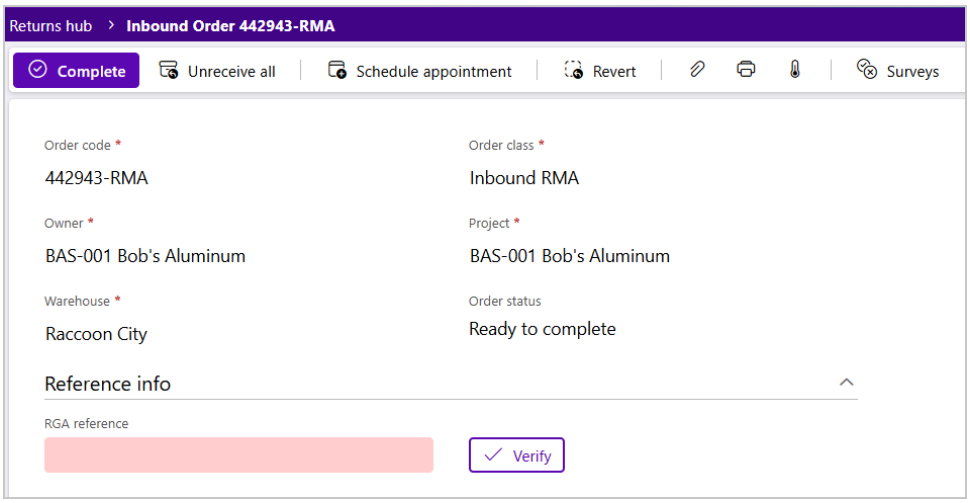
The Return Order can be opened for further review and management by clicking the blue Return Order number. In the top right corner are three tiles indicating the **Total Amount**, **Total Received**, and **Total Gross Received** for the Return.



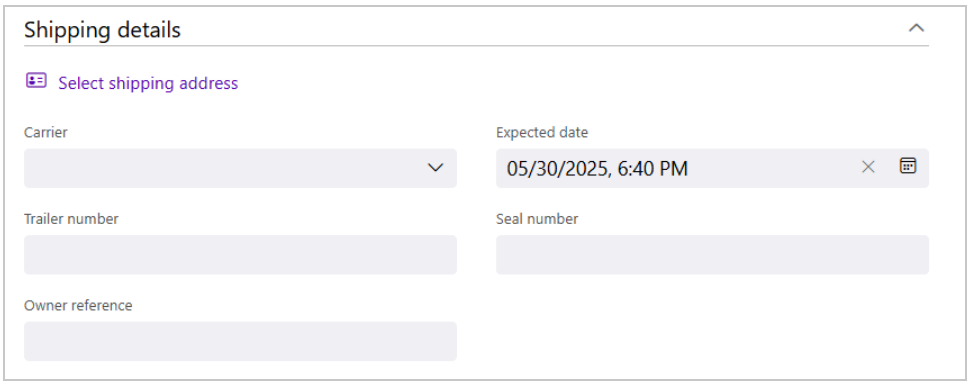
The Return Order's basic information will be displayed, including the Order number, Order Class, Owner, Project, Warehouse, and Order Status. The **Details** section can be opened for more information about the Return.

Icons along the top of the Return Order provide options to manage the Return. For more details, please visit the **Return Order Toolbar** section below.

Return Order Details



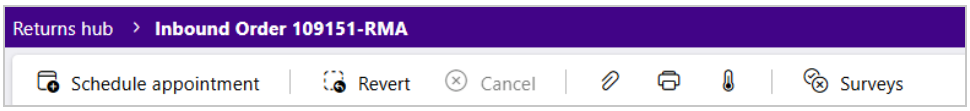
Order Code: The Return Order number.
Order Class: The Order Class the Order has been assigned to.
Owner: The Name of the Owner for whom the Order was created.
Project: The Name of the Project associated with the Order.
Warehouse: The Warehouse where the Order was Created.
Order Status: The current Status of the Order.
RGA Reference: The RGA Reference number for the Order.
Notes: Any Notes for the Order.



Ship From:	The Ship From Address for the Order.
Expected Date:	The Date the Delivery is Expected by, if specified in the Order's creation.
Carrier:	The Carrier specified for the Order.
Owner Reference:	The Reference Number given to the Order for the Owner's Reference.
Trailer Number:	The Trailer Number for the Order.
Seal Number:	The Seal Number for the Order.

Return Order Toolbar

The Return Order toolbar provides everything needed to manage a Return Order. Icons in the toolbar vary depending upon the Status of the order.



Complete:	The **Complete** option completes the Return Order.
Process:	The **Process** option processes the Return Order.
Auto-Receive:	The **Auto-Receive** option auto-receives the Return Order.
Appointment:	The **Appointment** option opens the Dock Appointment window for creation or management.
Revert:	The **Revert** icon reverts an Return Order from the status of Received or Canceled back to the Created status.
Cancel:	The **Cancel** option stops the Return Order once it's been started.
Delete:	The **Delete** icon deletes the Return Order.
Attachments:	The **Attachments** paperclip icon opens the Attachments window for the selected Return Order.
Print:	The **Print** icon opens a drop-down list of all files available for the Order

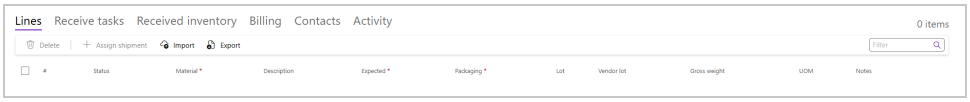
	that can be opened and printed. If only one relevant printable exists, it will open automatically when clicking the icon.
Options... Dropdown:	The Return Order **Options...** dropdown icon provides the ability to **Add Comments**, **Driver Checkout**, **View & Send Auto-Emails**, **Perform Pallet Transactions**, **View Submitted Surveys**, **Add Temperature Readings**, and **Copy Order**.

Return Order Tabs

The Return Order's Order Lines, Receiving Tasks, Receiving Invoices, Billing, Contacts, and Activity are listed in the tabs along the bottom. Each tab on the Return Order displays it's own set of information and options for managing that information. Tabs displayed for a Return vary depending upon the Type and Status of the order. Expand the sections below for more details about each tab.

Lines

The **Order Lines** tab displays the Return Order's Order Lines, along with options to **Add**, **Delete**, **Import**, and **Export** Order Lines.



Order Line Information

#:	The Order Line Number.
Status:	The Status of the Order Line.
Material:	The LookUp Code of the Material in the Order Line.
Packaging:	The Packaging UOM of the Material in the Order Line.
Expected:	The Quantity Received out of the Expected Quantity for the Order Line.
Lot:	The Lot assigned to the Material in the Order Line.
Vendor Lot:	The Vendor Lot assigned to the Material in the Order Line.
Gross Weight:	The Gross Weight of the Material in the Order Line.
UOM:	The Packaging UOM for the Material in the Order Line.
Material Description:	A Description of the Material in the Order Line.

Receiving Tasks

The **Receiving Tasks** tab displays the Return Order's Receiving Tasks, along with options to perform a **Bulk Lot Change**, do **Bulk Receiving**, and **Export** Receiving Tasks.



Receiving Tasks Information

Line #:	The Order Line Number for the Receiving Task.
Material:	The LookUp Code of the Material in the Receiving Task.
Packaging:	The Packaging UOM of the Material in the Receiving Task.
Received:	The Quantity of Material Base UOM Received for the Receiving Task.
Remaining:	The Quantity of Material Base UOM Remaining to be Received for the Receiving Task.
Receive Quantity:	The expected Quantity of the Material for the Receiving Task.
Damaged Qty:	The Quantity of Damaged Material in the Receiving Task, when applicable.
Receive Location:	The Receiving Location for the Material in the Receiving Task.
Receive LP:	The Receiving License Plate of the Material in the Receiving Task.
Lot:	The Lot assigned to the Material in the Receiving Task.
Vendor Lot:	The Vendor Lot assigned to the Material in the Receiving Task.

Received Inventory

The **Received Inventory** tab displays the Return Order's Received Inventory, along with options to **Unreceive** and **Export** selected inventory.



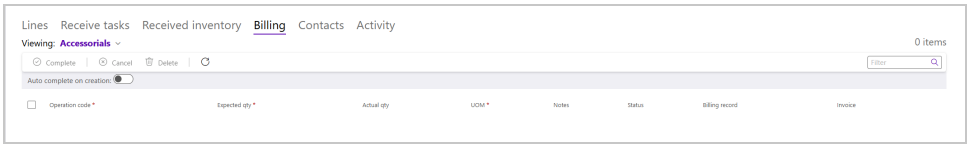
Received Inventory Information

Line #:	The Order Line Number for the Received Inventory.
Material:	The LookUp Code of the Material Received.
Total Expected:	The Total Expected Quantity of the Received Inventory.
Actual:	The Actual Quantity of Received Inventory.
License Plate:	The License Plate of the Received Inventory.

Current Location:	The Current Location of the Received Inventory.
Lot:	The Lot assigned to the Received Inventory.
Vendor Lot:	The Vendor Lot assigned to the Received Inventory.

Billing

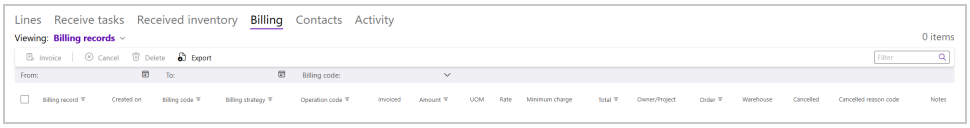
The **Billing** tab displays the Return Order's Accessorials and Billing Records, along with options to manage them. The Accessorials are listed by default, and Billing Records can be viewed by selecting that option from the dropdown.



Billing Information for Accessorials

Options for the Accessorials listed here include the ability to **Complete**, **Add**, **Remove**, and **Cancel** Accessorials, as well as the toggle to determine whether or not to **Auto Complete on Creation**.

Operation Code:	The Accessorial's Operation Code.
Actual Qty:	The Actual Quantity for the Accessorial.
Expected Qty:	The Expected Quantity for the Accessorial.
UOM:	The Base UOM for the Accessorial.
Status:	The Status of the Order Line.
Billing Record:	The LookUp Code of the Billing Record for the Return Order.
Notes:	Any Notes for the Accessorial.



Billing Information for Billing Records

Options for the Billing Records listed here include the ability to **Create New** or **Add to Existing Invoice**, **Cancel**, **Delete**, **Export**, and **Filter** Billing Records by Date Range and/or Billing Code.

ID:	A system-generated field containing the system's unique ID for this

	particular Billing Record.
Created:	The date the Billing Record was created.
Billing Code:	The Billing Record's Billing Code.
Billing Strategy:	The Billing Record's Billing Strategy.
Amount:	The Billing Record's Quantity.
UOM:	The Base UOM for the Billing Record.
Rate:	The Rate for the Billing Record.
Minimum Charge:	The Minimum Charge for the Billing Record.
Total:	The Total of the Billing Record.
Invoiced:	The Invoiced part of the Billing Record.
Owner:	The Owner for the Billing Record.
Project:	The Project for the Billing Record.
Details:	The Details for the Billing Record.
Notes:	Any Notes for the Billing Record.
Canceled:	An indication of whether or not the Billing Record has been canceled.
Canceled Reason Code:	For canceled Billing Records, the Reason Code selected when the Billing Record was canceled.

Contacts

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



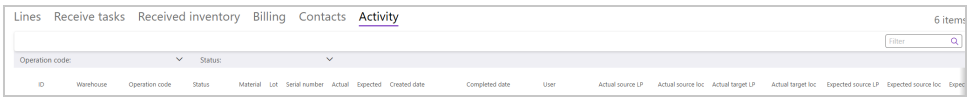
Contacts Information

Type:	The Type of Contact for the Return 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.
State:	The State of the Contact.
Postal Code:	The Postal Code of the Contact.
Country:	The Country of the Contact.

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.

Activity

The **Activity** tab displays the Return Order's Activity in the Warehouse, including the 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 Return Order took place.
Operation Code:	The Activity's Operation Code.
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 Base UOM for the Activity.
Expected:	The Expected Base UOM for the Activity.
Created Date:	The date the Activity was created.
Completed Date:	The date the Activity was completed.
User:	The logged in User who performed the Activity.
Actual Source LP:	The Actual Source License Plate in the Activity.
Actual Source Loc:	The Actual Source Location in the Activity.
Actual Target LP:	The Actual Target License Plate in the Activity.
Actual Target Loc:	The Actual Target Location in the Activity.
Expected	The Expected Source License Plate in the Activity.

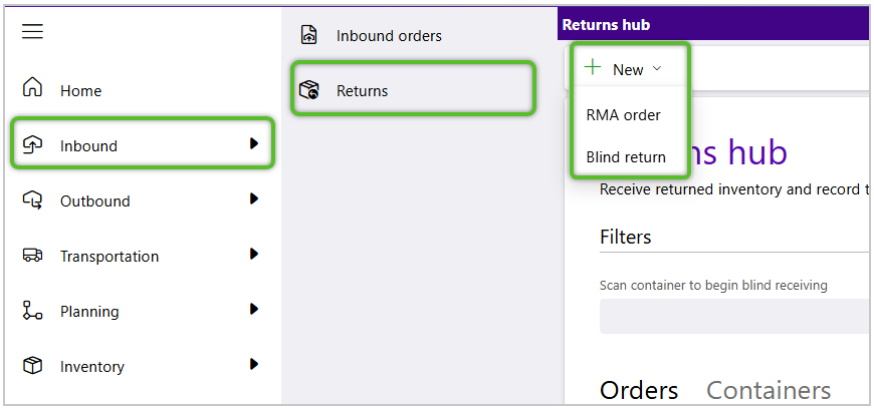
Source LP:	
Expected Source Loc:	The Expected Source Location in the Activity.
Expected Target LP:	The Expected Target License Plate in the Activity.
Expected Target Loc:	The Expected Target Location in the Activity.
Notes:	Any Notes added to the Activity.

Return Process

The Return Process is comprised of creating a Return Order, Auto-Receiving that Order's Shipments when they arrive, and Completing the Return so all necessary information is sent to Billing.

Step 1. Create a Return or Blind Return

An end customer occasionally has the need to return items or packages delivered to them for various reasons (damages, dissatisfaction, etc.). Prior to the receipt of this Return, an advanced Inbound Order, or Return Merchandise Authorization (RMA), can be created in Footprint.



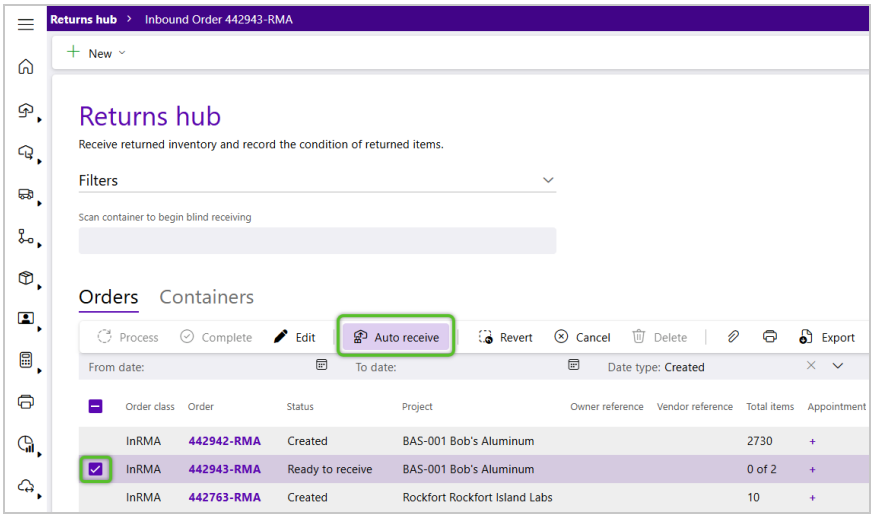
The new Return Order is where users can add Return Order Lines from completed Outbound Orders or manually, attach documents, and more.

Related Tutorials

- Create a Return Order
- Create a Blind Return Order
- Create a Return Dock Appointment
- Process a Return Order

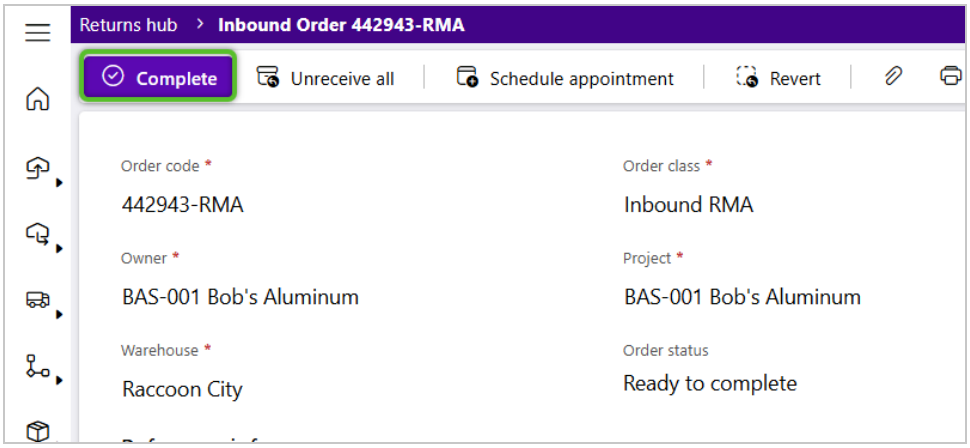
Step 2. Auto-Receive a Return

Auto-Receiving is the process of confirming what was Ordered has arrived in the Warehouse. The Materials will be assigned License Plates, as well as given Lot and weight information.



Step 3. Complete a Return

Completing a Return Order is the final sendoff in the Return process. This is where a user confirms that everything in the process has transpired properly, then closes out the Return Order, sending information to Billing.



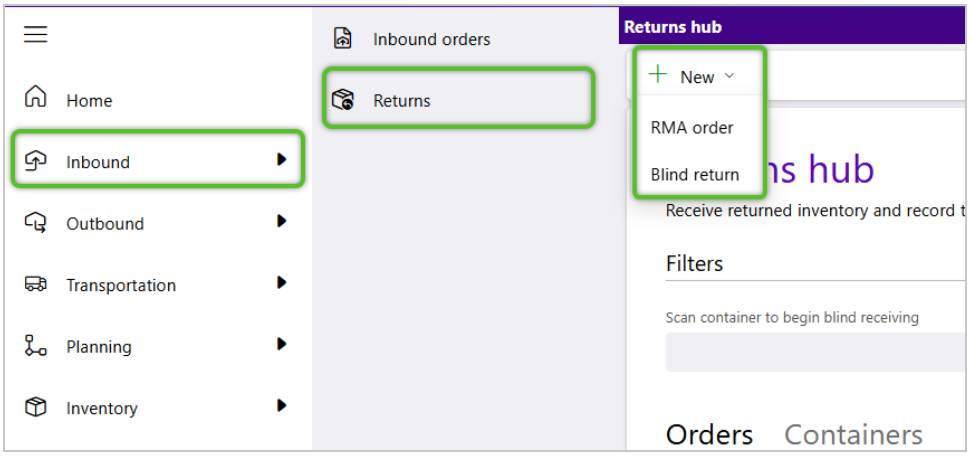
Create a Return Order

A Return Order, or Return Merchandise Authorization (RMA), begins the process of returning inventory. When associating Outbound Order Lines with the Return Order, their respective Outbound Shipments must be in the Complete status. Once created, the Return Order can be managed from the Returns Hub.

1. Click **Inbound** in the left navigation menu and select **Returns**.

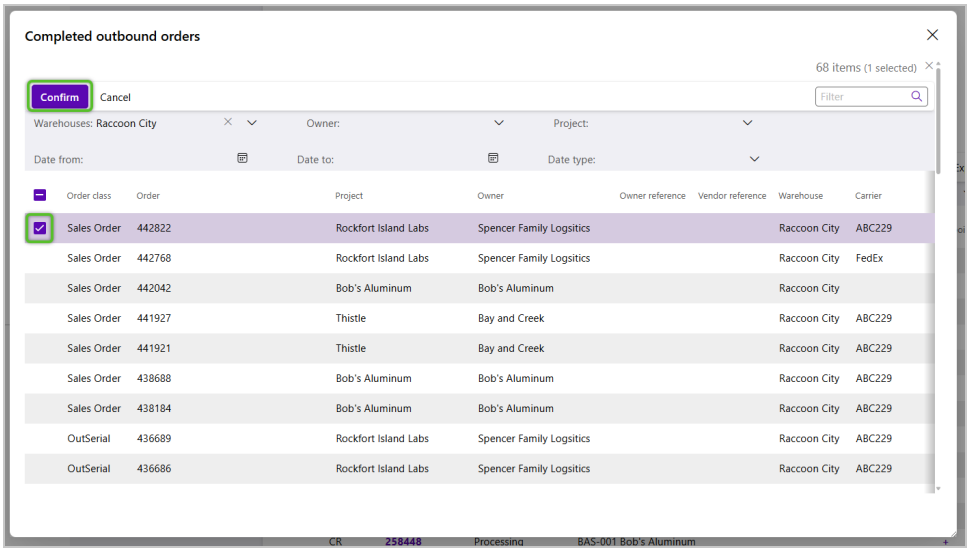
The **Returns Hub** will display.

2. Click **+ New** in the top Returns Hub toolbar and select **RMA Order**.



3. In the **Completed Outbound Orders** window, locate the order to be returned and check the box in the left column.

4. Click the blue **Confirm** button to create the Return with the selected completed outbound order(s).

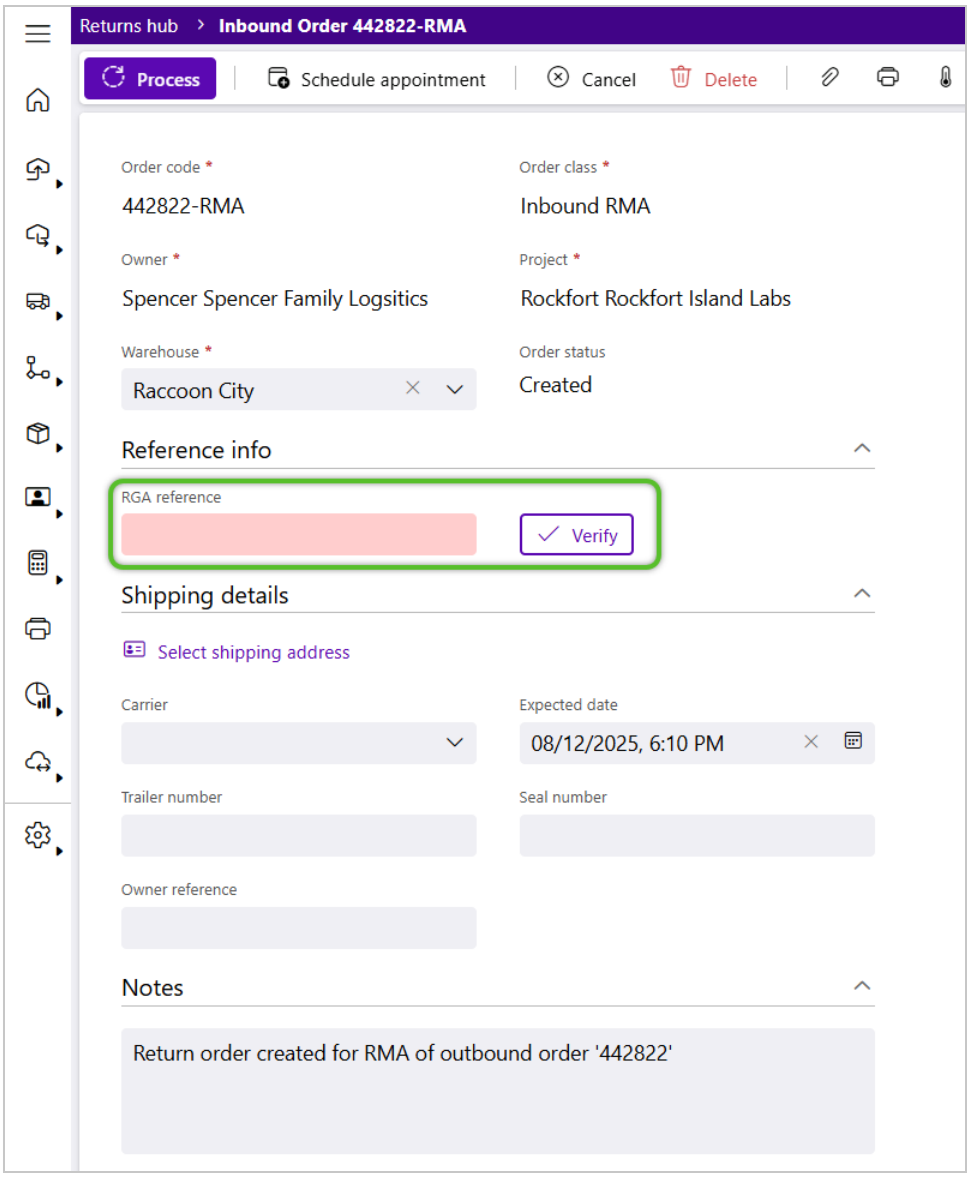


5. In the **Successfully Created RMA** window, click the **OK** button.

The **Inbound Return Order** will open for updating.

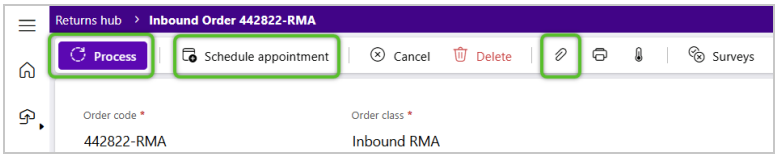
In the **Order** section, fields are already populated and only the **Warehouse** can be changed.

6. In the optional **RGA Info** section, enter the **RGA Reference** number and click the **Verify** button.

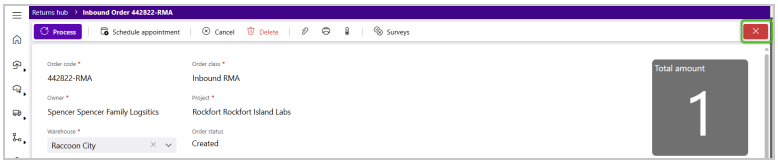


7. In the **Details** section, enter any necessary information for the Return.

From here, users can continue working with the Return Order by clicking **Process**, **Appointment**, or the **Attachments** paperclip icon.



8. To close the Return Order and view the Returns Hub list, click the **X** in the top right.



The Return will be listed in the Returns Hub with it's current status.

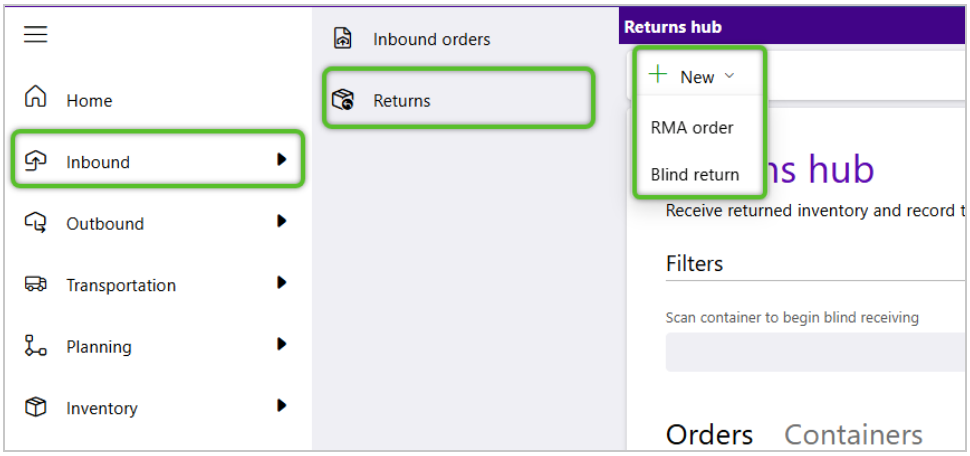
Create a Blind Return Order

Blind Returns are where instead of locating the corresponding Outbound Order, the user identifies the return by scanning or entering the Tracking Number of the Container being returned. If the system finds any matches, it will populate relevant Inventory. Otherwise, the items will have to be manually entered. While a Blind Return can be created and managed in Footprint, the adding of Containers is done using a mobile device. Once created, Blind Returns can be managed from the Returns Hub.

1. Click **Inbound** in the left navigation menu and select **Returns**.

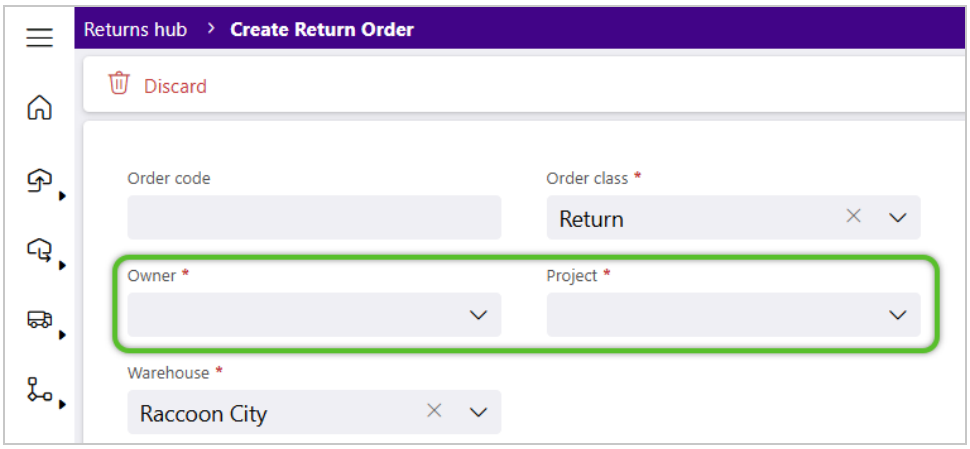
The **Returns Hub** will display.

2. Click **+ New** in the top Returns Hub toolbar and select **Blind Return**.



In the **Create Return Order** window, the **Lookup** can be left blank to auto-generate, or it can be manually entered. The **Order Class** and the user's **Warehouse** are already populated.

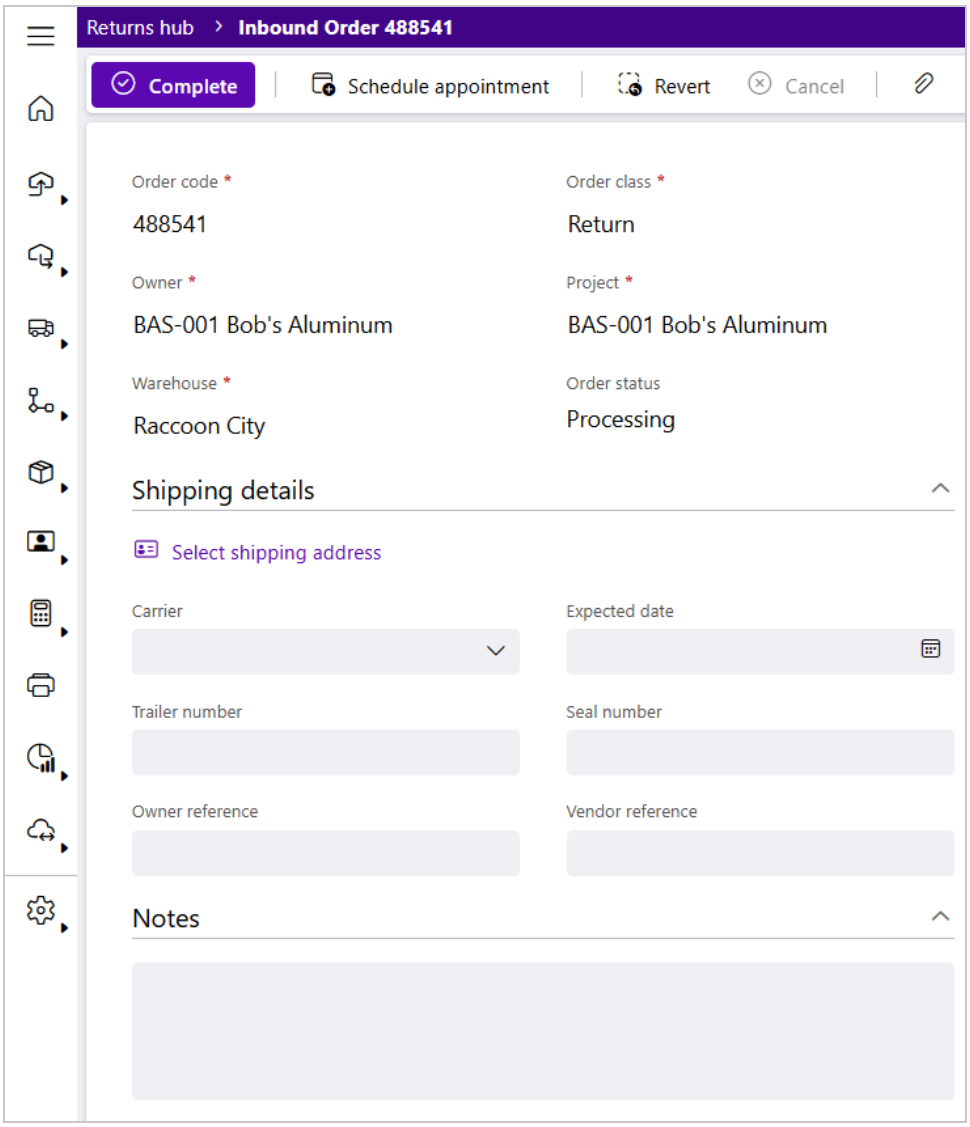
3. Select an **Owner** and a **Project** for the Blind Return.



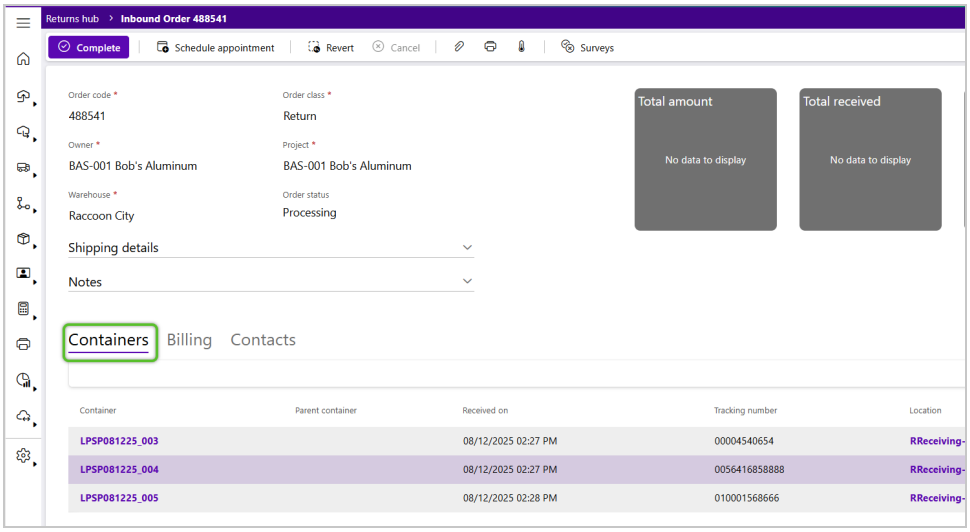
The **Blind Return Order** screen will update, allowing more details to be entered.

In the **Order** section, previously entered details are populated and cannot can be changed.

4. In the **Details** section, enter any necessary information for the Blind Return.

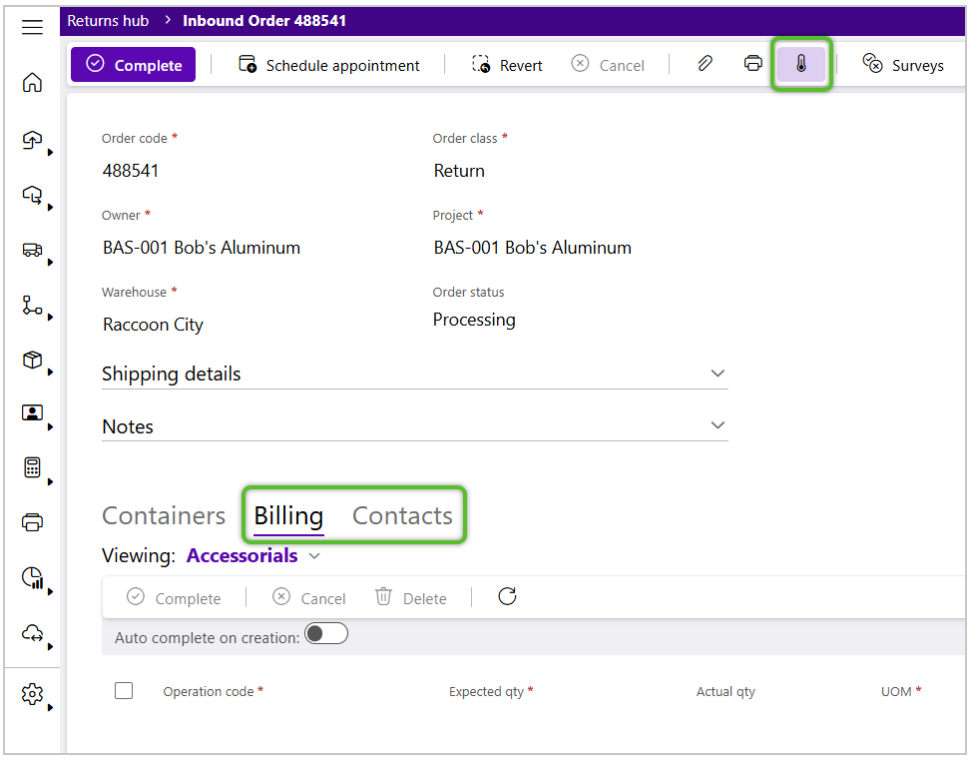


5. As Containers for this Return are confirmed on a mobile device, review and manage their details from the **Containers** tab.

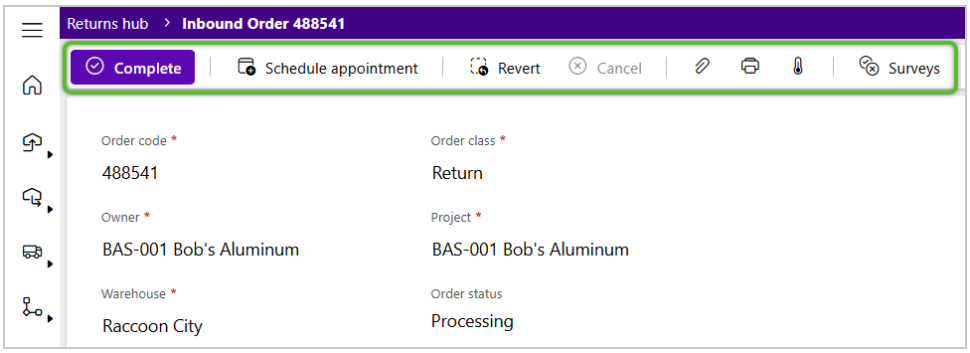


Billing Charges, Contacts, and Temperatures from equipment will be listed in their respective tabs.

6. When needed, add **Billing Charges**, **Contacts**, and **Temperatures** using the tabs along the bottom of the Blind Return at bottom in the toolbar.



7. Use the icons in the Blind Return's top toolbar to **Add a Dock Appointment**, **Add Attachments**, **Complete the Blind Return**, and so on.



The Blind Return will be listed in the **Returns Hub** with the Processing status, and is ready for Receiving.

Process a Return Order

Return Orders can be processed from the Returns Hub, or directly from the Return Order itself.

Note

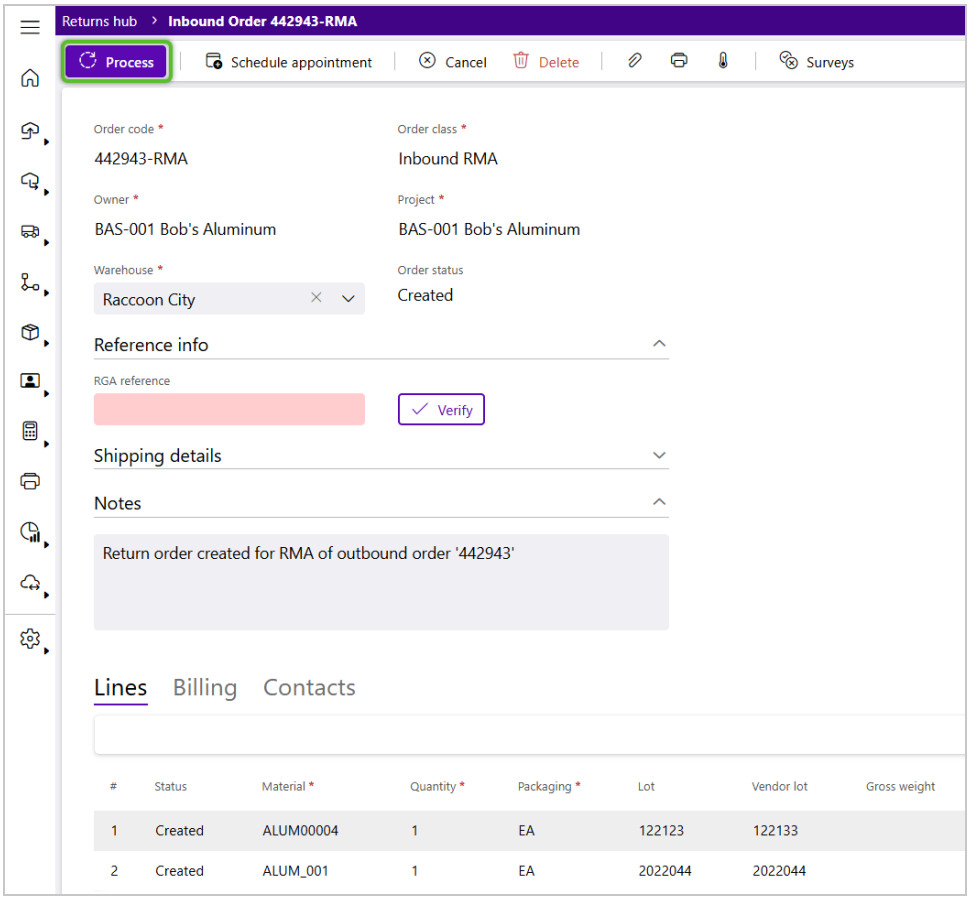
Return Orders can only be processed when they have the **Created** status.

From the Return Order

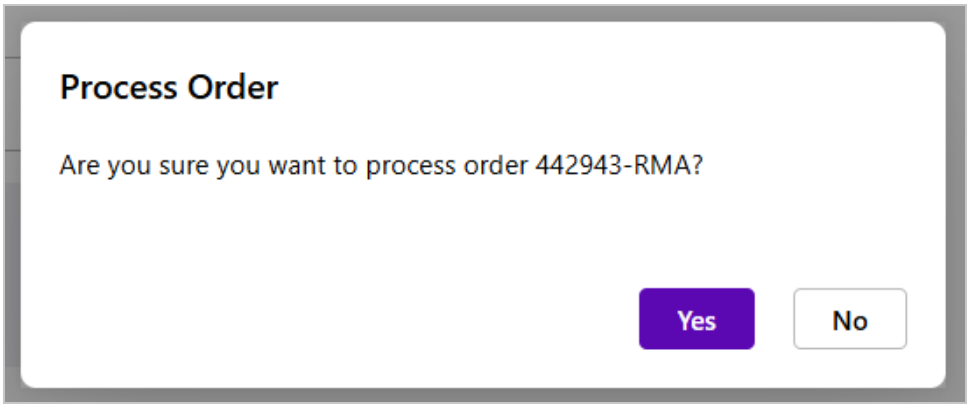
1. Locate the Return Order in the Returns Hub, then click the blue **Order** number.

The Return will open for review.

2. Click the **Process** button in the **Orders** toolbar.



3. Click **Yes** in the **Process Order** window to begin processing the Return Order.



4. Click **OK** to close the **Process Order** confirmation window after processing has completed.

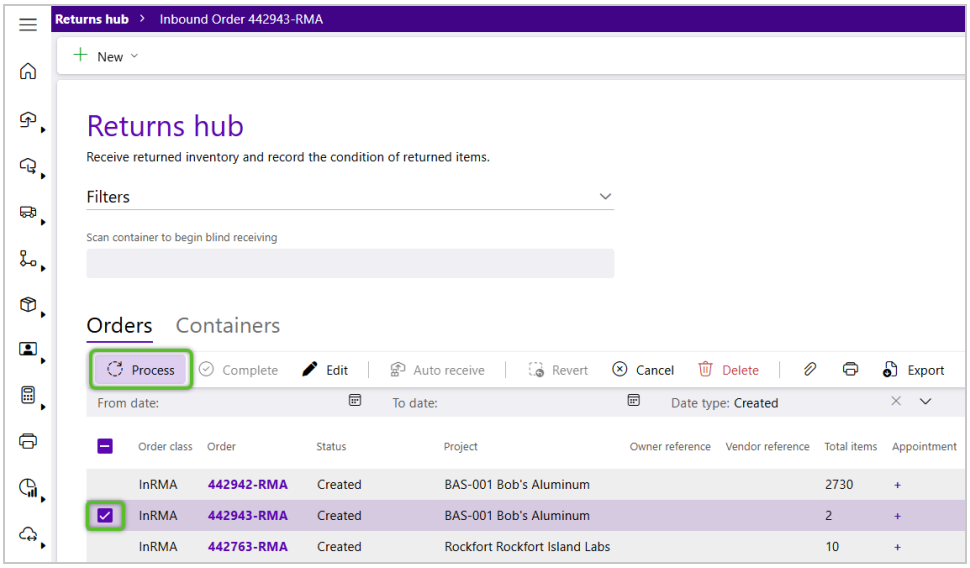
When processing has completed, the Return Order status updates to **Ready to Receive** and **Auto Receive** becomes available.

From the Returns Hub

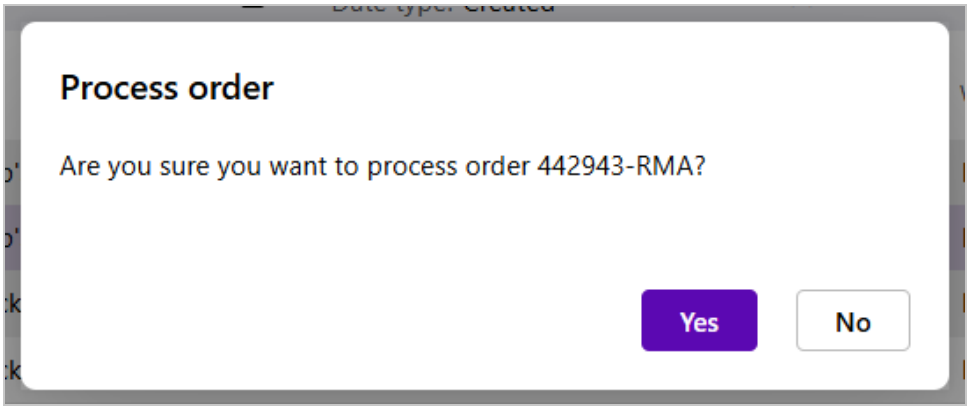
1. Check the box for the Return Order, then click **Process** in the Orders tab toolbar.

Note

When selecting multiple Return Orders for processing, the **Process** button will only process orders with the **Created** status.



2. Click the **Yes** button in the **Process Order?** window to complete processing.



3. Click the **OK** button to close the **Process Order** confirmation window after processing has completed.

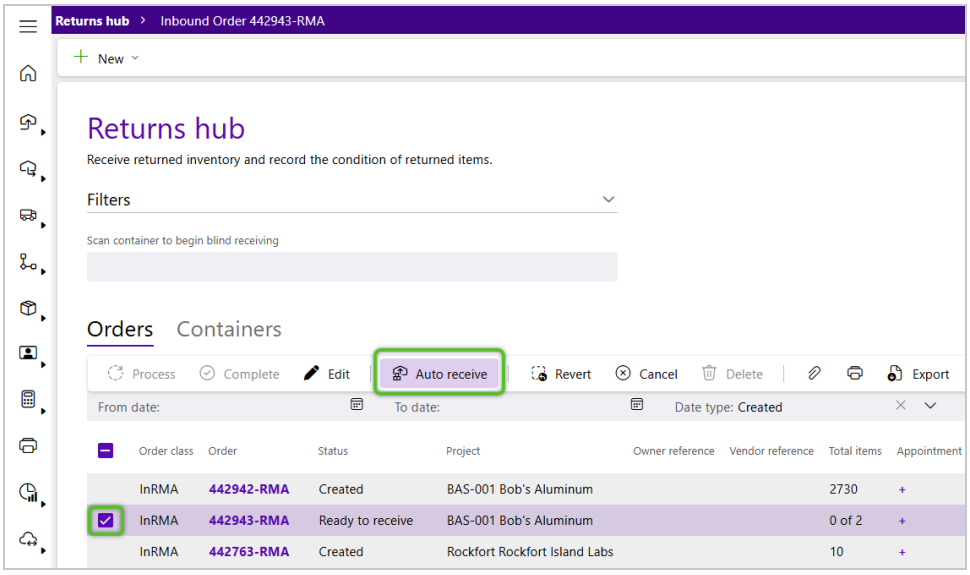
When processing has completed, the Return Order status updates to **Ready to Receive** and **Auto Receive** becomes available.

Auto-Receive a Return Order

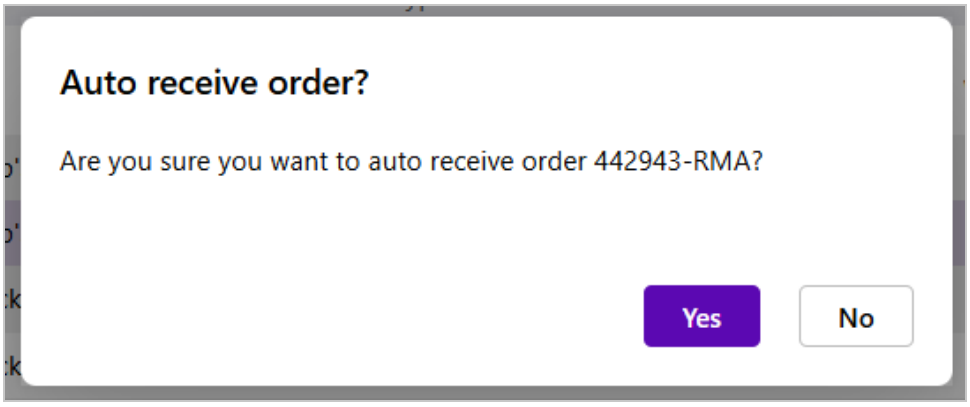
This article explains how to Auto Receive the known License Plates of inventory for a Return Order. One or multiple Return Orders with a Ready to Receive status can be selected and auto received.

1. From the **Returns Hub**, check the box to the left of the Return Order(s) to be received.

2. Click the **Auto Receive** option in the **Orders** tab toolbar.



3. Click the **Yes** button to Auto Receive the order.



4. Click the **OK** button to close the receipt confirmation window.

The status of the auto-received Return order will now be **Ready to Complete**.

Complete a Return Order

Completed Return Orders will still be available for review and management in Footprint, but only when specifically filtering for orders with the status of Completed.

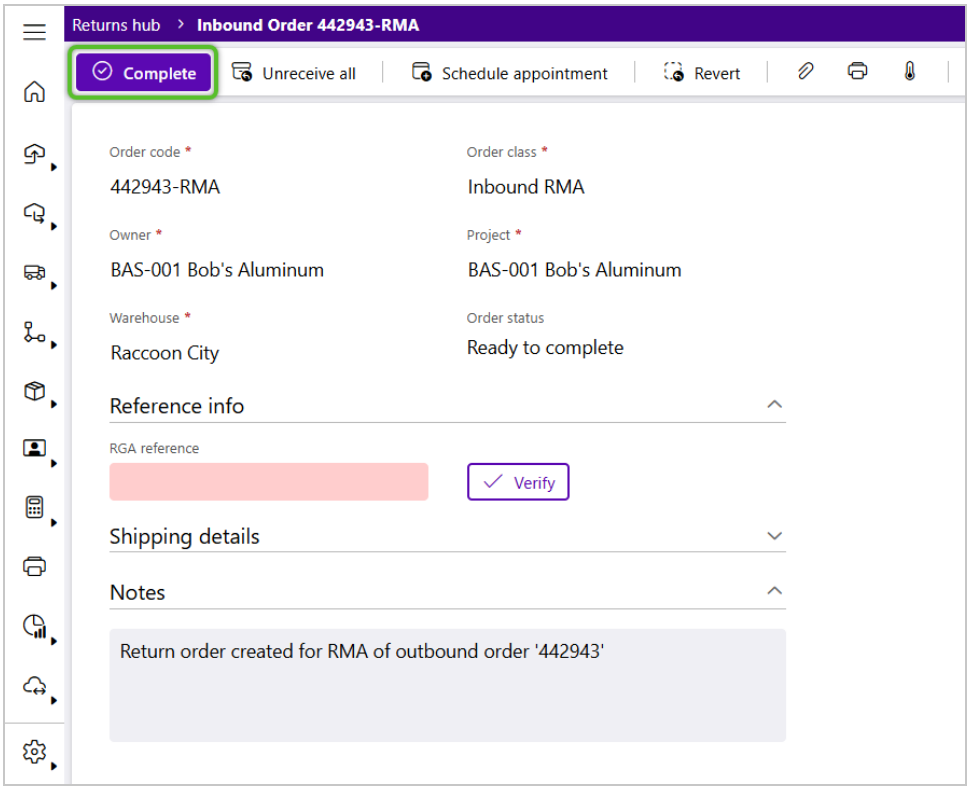
Note

Return Orders can only be completed when they have the **Ready to Complete** status.

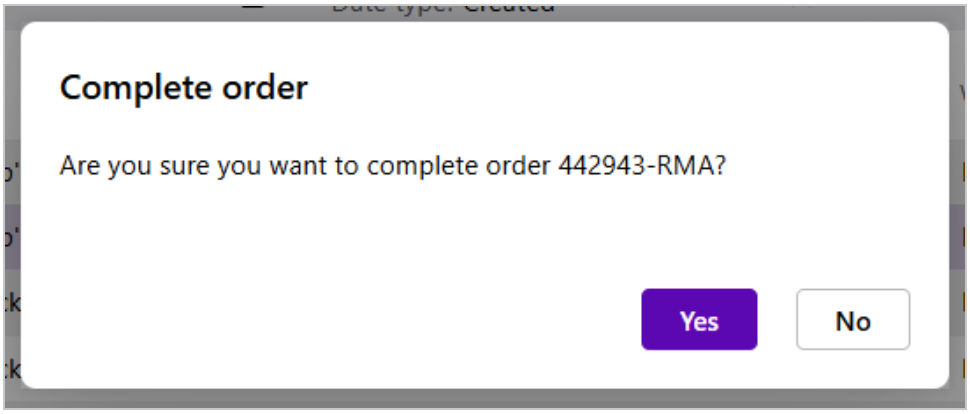
From The Return Order

1. Locate the Return Order in the Returns Hub, then click the **Order** number.

2. Click **Complete** in the Order toolbar when the Return opens.



3. Review the details are correct in the **Complete Order** window, then click the **Yes** button to complete the Return.

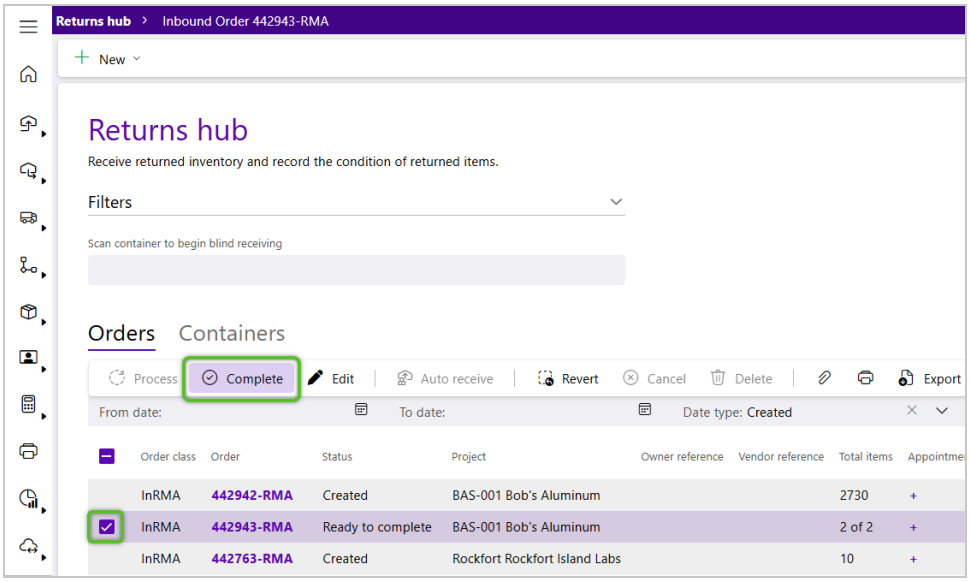


4. Click the **OK** button to close the completed Return Order confirmation window.

The completed Return will now only appear in the list when filtering for orders with the **Completed** status.

From The Returns Hub

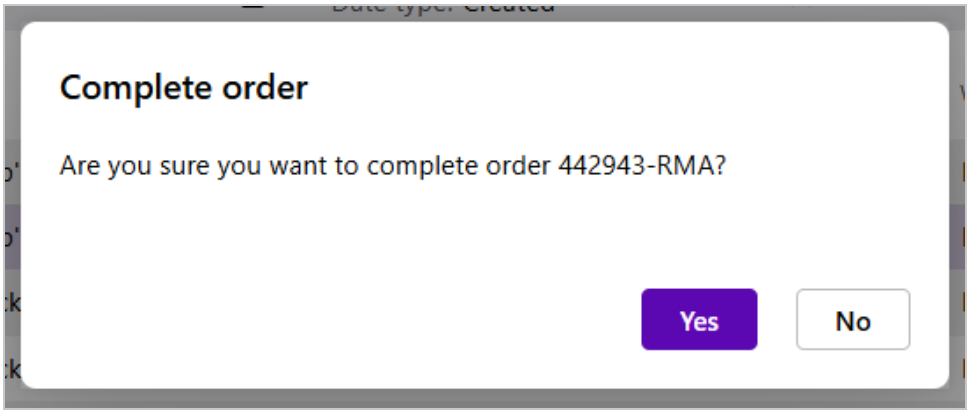
1. Check the box for the Return Order, then click **Complete** in the Orders tab toolbar.



Note

When selecting multiple Return Orders for processing, the **Process** button will only process orders with the **Created** status.

2. Review the details are correct in the **Complete Order** window, then click the **Yes** button to complete the Return.



3. Click the **OK** button to close the completed Return Order confirmation window.

The completed Return will now only appear in the list when filtering for orders with the **Completed** status.

Transportation Guide

Sections

- Overview
- Dock Appointments
- Dock Doors
- Driver Check Out
- Load Containers
- Shipping Containers
- Transload Orders

Overview

From the **Transportation** menu, users can review and manage all Transportation-related operations from the following Hubs (submenus): Dock Appointments, Dock Doors, Driver Check Out, Load Containers, Shipping Containers, and Transloads.

Dock Appointments Hub

Dock Appointments allow for the planning of Dock usage by reserving times for trucks to be in Dock spaces. Dock Appointments can be created for Inbound, Outbound, and Return Orders, and include options for Dock Door assignment, Check-in, progress updates, and completion.

The **Dock Appointments Hub** contains details about all Dock Appointments. For convenience, the Inbound Hub will only display Inbound Dock Appointments and the Outbound Hub will only display Outbound Dock Appointments.

Dock Doors can be managed from the top toolbar, as well as the **Dock Doors Hub**. In the top, right corner are two tiles indicating the number of Appointments **Checked In Today** and the number **In Transit Today**. Dock Appointments can be filtered by Owner, Project, Warehouse, Carrier, Appointment Type, and Appointment Status.

There are three Dock Appointments Hub Tabs: **Calendar**, **Appointment List**, and **Orders Dashboard**. The **Calendar** tab displays appointments in a timeline format, and provides options to navigate Appointments by day, filter for specific Appointments, and Create Appointments. The blue box along the right of the Calendar displays Appointments that have not been assigned a Dock Door. Simply drag and drop Appointments to the Dock Door on the Calendar when ready.

The **Appointments List** tab displays Appointments in standard list format and provides options to Create Appointments, navigate by day, filter for specific Appointments, Print files, Add Attachments, and Export details. The **Orders Dashboard** tab displays all Orders with upcoming Dock Appointments and provides options to refresh, navigate by day, and filter by date.

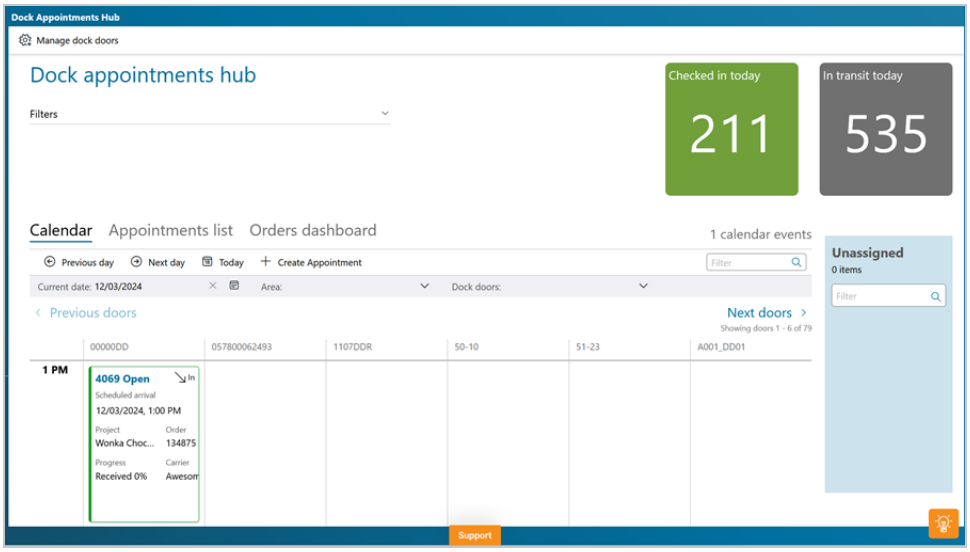
Related Tutorials

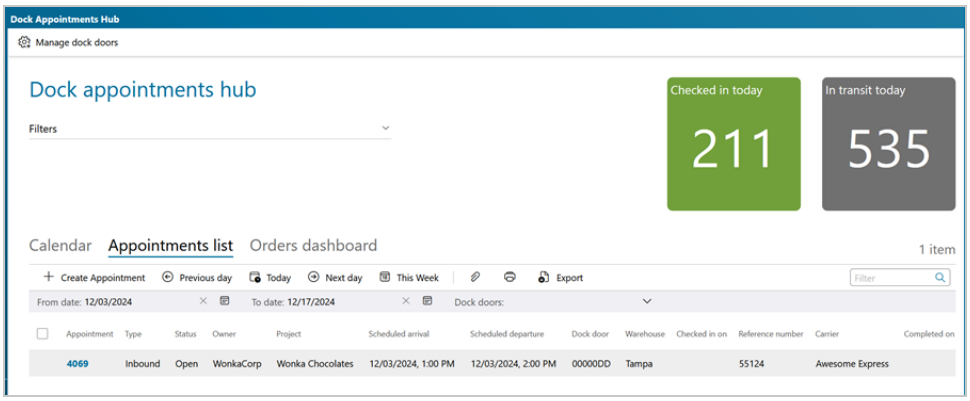
- Create an Inbound Dock Appointment
- Create an Outbound Dock Appointment
- Create a Return Dock Appointment
- Check In a Dock Appointment
- Mark a Dock Appointment In Process
- Complete a Dock Appointment
- Manage Appointment Types

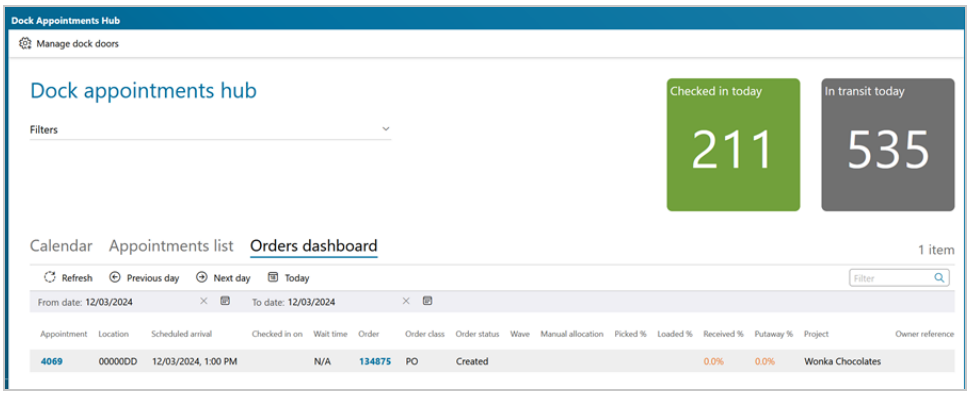
Dock Appointment Details

Appointment Code:	The Appointment's system-generated ID number.
Type:	The Order Type associated with the Appointment.
Status:	The Status of the Appointment.
Scheduled Dock Door:	The Dock Door at which the Appointment is expected to take place.
Scheduled	The scheduled Arrival date and time for the Appointment.

Arrival:	
Scheduled Departure:	The scheduled Departure date and time for the Appointment.
Owner:	The Owner associated with the Appointment.
Project:	The Project associated with the Appointment.
Order:	The Order associated with the appointment.
Carrier:	The Carrier associated with the appointment.
Reference Number:	The Reference Number for the Appointment.
Notes:	An open field for any notes about the Appointment.
Progress:	The completed percentage of the Dock Appointment's current Status. For example, 'Received 40%' or 'Loading 90%.'





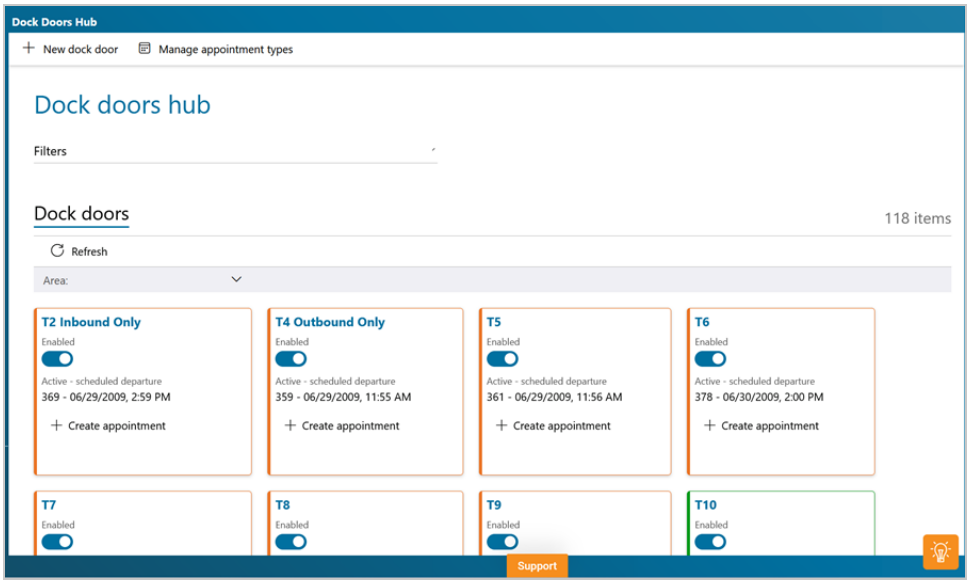


Dock Doors Hub

Dock Doors function as another type of **Zone** or **Area**, and are designed to represent the loading docks in your warehouse. Dock Doors allow the scheduling of Dock Appointments to them.

The **Dock Doors Hub** displays all Dock Doors and provides options to **Manage Dock Doors** and **Manage Appointment Types** in the top toolbar.

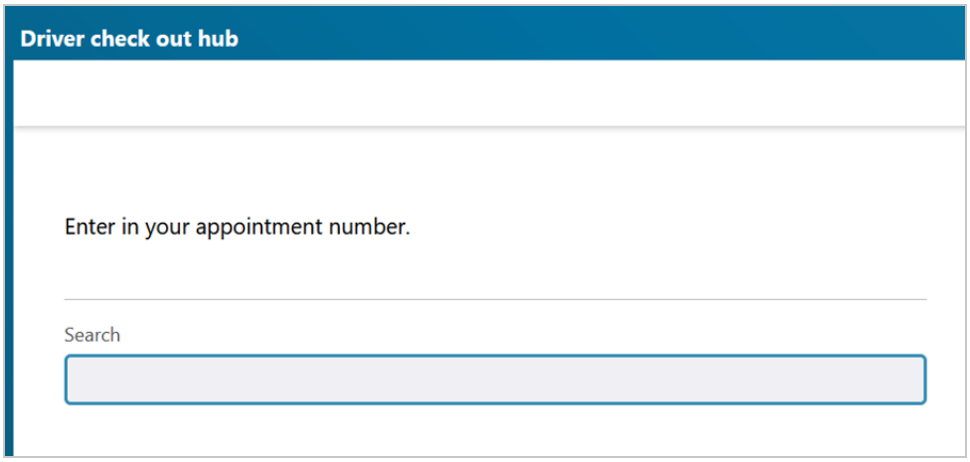
Users can filter Dock Doors, view recent activity, and provide the ability to create an Appointment directly from the Dock Door itself.



Driver Check Out Hub

When completing an Outbound Order, **Driver Check Out** allows the driver's signature to be captured and the signed Bill of Lading to be printed. Driver Check Out can be done from here, in the Transportation Hub, as well as from an Outbound Order.

The **Driver Check Out Hub** provides the option to enter or scan an Appointment number to pull up the Driver Check Out form.



Load Containers Hub

In Footprint, Containers are used to hold Inventory. They have specified physical measurements, weights, weight capacities, and fill capacities, allowing them to be used for Cartonization purposes to determine what can fit inside. **Load Containers** are designed to help you prioritize Shipments and set a Loading order for the Materials involved based on the specifications of the Containers.

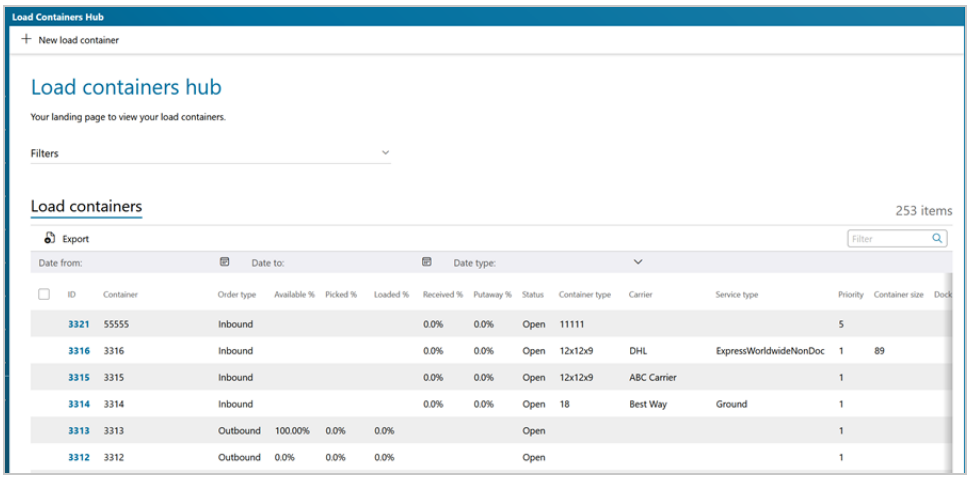
When the Warehouse has a complex series of Load Containers being worked at once, it can often be a headache to keep track of the status of each load process while they are in progress.

The **Load Containers Hub** allows users to view and manage Load Containers, for both Inbound and Outbound Orders. Users can also drill down to a shipment-by-shipment level for tracking.

Load Container Details

ID:	The Load Container's LookUp Code.
Container:	The Name of the Load Container.
Order Type:	The Type of Order associated with the Container.
Available %:	The percentage of the Load Container that is Available.
Picked %:	The percentage of the Load Container that is Picked.
Loaded %:	The percentage of the Load Container that is Loaded.
Received %:	The percentage of the Load Container that is Received.
Putaway %:	The percentage of the Load Container that is Putaway.
Status:	The Status of the Load Container.
Container Type:	The Type of Load Container (Inbound or Outbound).
Carrier:	The Carrier who will be delivering the Load Container.
Service Type:	The delivery method used by the Carrier.
Priority:	The Priority of this Load Container, displayed highlighted in that Priority's color. Should be used to help guide the order in which different Load Containers are attended to when In-Yard.
Container Size:	The Load Container's physical dimensions.
Dock Appointment:	The Date on which the Load Container will be made Available.
Scheduled Location:	The scheduled Location of the Load Container.
Seal ID:	If a Seal is being used for the Load Container, this is that Seal's ID number.
Trailer Number:	The Trailer Number for the Load Container.
Yard Location:	The Yard Location of the Load Container.
Notes:	Any Notes for the Load Container.
Available Date:	The Date on which the Load Container will be made Available.
Call Out Date:	The Date on which the Load Container was Called Out for pickup.
Check Out Date:	The Date on which the Load Container was Checked Out of the Warehouse.
In Yard Date:	The Date on which the Load Container was checked into the

	Warehouse.
Last Onsite Date	The last day the Container can be on your property before being charged.
Last Pier Date:	The last day the Container can be on the pier before being charged.
Created Date:	The date and time the Container was created.
Created by:	The user who created the Container.
Modified Date:	The last date and time the Container was modified.
Modified by:	The last user who modified the Container.



Shipping Containers Hub

In Footprint, Containers are used to hold Inventory. They have specified physical measurements, weights, weight capacities, and fill capacities, allowing them to be used for Cartonization purposes to determine what can fit inside. **Shipping Containers** are automatically created for Shipping License Plates when Picking. A Shipping Container can either hold **one** License Plate, or any number of Shipping Containers within itself.

The **Shipping Containers Hub** allows users to view and manage all Shipping Containers in the Warehouse.

Shipping Container Details

ID:	The Shipping Container's LookUp Code.
Container:	The Name of the Shipping Container.
Order Type:	The Type of Order associated with the Container.
Warehouse:	The Warehouse from which the Order is Shipping.
Owner:	The Owner associated with the Shipping Container
Project:	The Project associated with the Shipping Container.
Status:	The Status of the Shipping Container.
Order:	The Order Lookup associated with the Container.
Load Container:	The Name of the Load Container associated with the Shipping Container.
Pack Verification Date:	The date the Shipping Container was Pack Verified.
Bill of Lading:	The Bill of Lading number for this Shipment.
Tracking Number:	The Tracking ID or Pro Number for the Shipping Container.
Seal ID:	The Seal ID for the Shipping Container.
Container Number:	The number of this particular Container.
Attachments:	A checkbox indicating whether or not there are Attachments associated with the Shipping Container.
Release Number:	The Shipping Container's Customs Release Number, if applicable.
Declared Value:	The Shipping Container's value declared at Customs, if applicable.
Deleted:	A checkbox indicating whether or not the Shipping Container has been deleted.
Estimated Delivery:	The estimated date the Shipping Container will be delivered.
Height:	The Shipping Container's height.
Length:	The Shipping Container's length.
Width:	The Shipping Container's width.
Volume:	The Shipping Container's volume.
Weight:	The Shipping Container's weight.
Nmfc Number:	The Shipping Container's Nmfc Number.
Nmfc Sub	The Shipping Container's Nmfc Sub Number.

Number:

Notes: Any Notes for the Shipping Container.

Packaged Item Count: The number of Packages of Inventory in the Shipping Container.

Sail on Board: The Sailed on Board Date for the Shipping Container.

Shipping Cost: The Shipping cost for the Shipping Container.

Shipping Date: The Date on which the Shipping Container was Shipped.

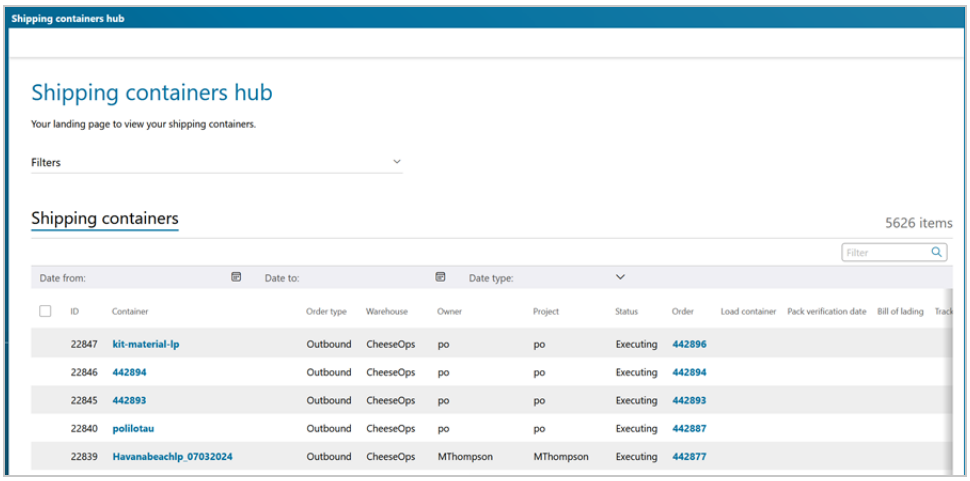
Trailer Number: The Trailer Number for the Shipping Container.

Created Date: The date and time the Container was created.

Created by: The user who created the Container.

Modified Date: The last date and time the Container was modified.

Modified by: The last user who modified the Container.



Transload Orders Hub

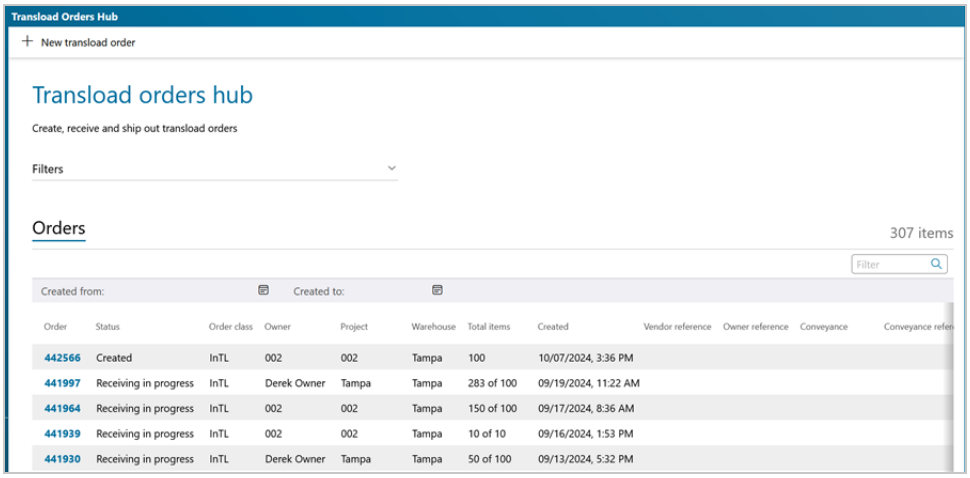
Transload Orders, also known as **Cross Docking**, involve both an Inbound and an Outbound Order, bringing Inventory to the Warehouse, then sending it back out, all without being stored. These Orders take Inbound Shipments and Outbound Shipments and put them together under one single Order.

The process completely eliminates Putaway and Picking, and adds a couple extra steps during Receiving (assigning the Received License Plates to their Outbound Shipments) and the Outbound process (releasing the Composite License Plates for Loading), but the process is largely the same as standard Inbound and Outbound Operations.

The **Transload Orders Hub** displays all Transload Orders and provides options to **Create a Transload Order** and manage existing Orders.

Transload Order Details

Order:	The LookUp for the Transload Order.
Status:	The current Status of the Transload Order.
Order Class:	The Order Class of the Transload Order.
Owner:	The Name of the Owner for whom the Order was created.
Project:	The Project the Order is associated with.
Warehouse:	The Warehouse in which the Transload is taking place.
Total Items:	The total number of items included in the Transload Order.
Created:	The Date the Transload Order was Created.
Vendor Reference:	The Vendor Reference number associated with the Transload Order.
Owner Reference:	The Owner Reference number associated with the Transload Order.
Conveyance:	The Conveyance method, or anticipated means of delivery, for this Transload Order.
Conveyance Reference:	The Conveyance Reference number associated with the Transload Order.
Notes:	Any Notes for the Transload Order.

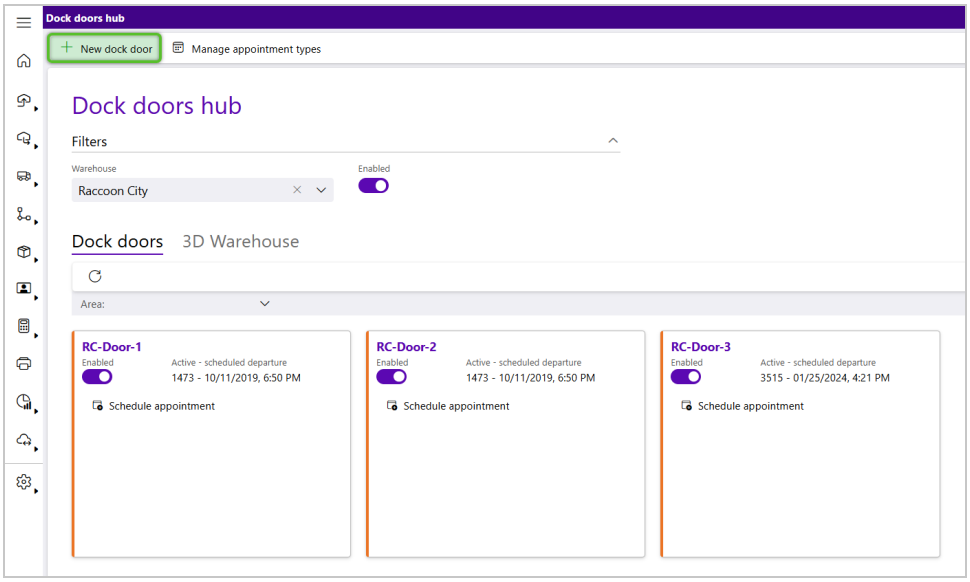


Manage Dock Doors

Dock Doors can be managed by clicking **Transportation** in the left navigation menu, then selecting Dock Appointments or Dock Doors.

Create a Dock Door

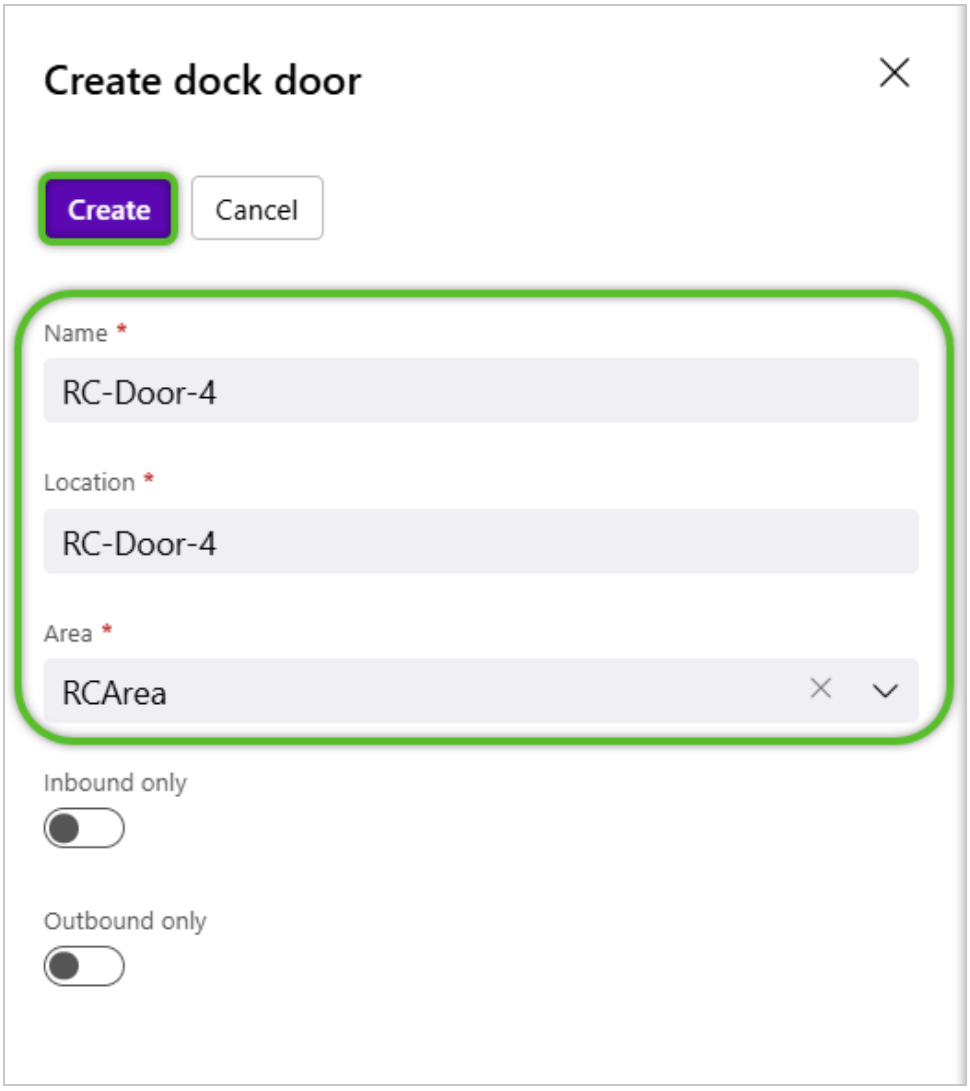
1. From the Dock Doors Hub, click **+ New Dock Door** in the top toolbar.



2. In the **Create Dock Door** window, enter the required **Name**, **Location**, and **Area** for the new Dock Door.

3. If the Dock Door will only be for Inbound or Outbound, click the respective **Inbound Only** / **Outbound Only** toggle.

4. Once all fields have been set, click the **Create** button in the top left corner.



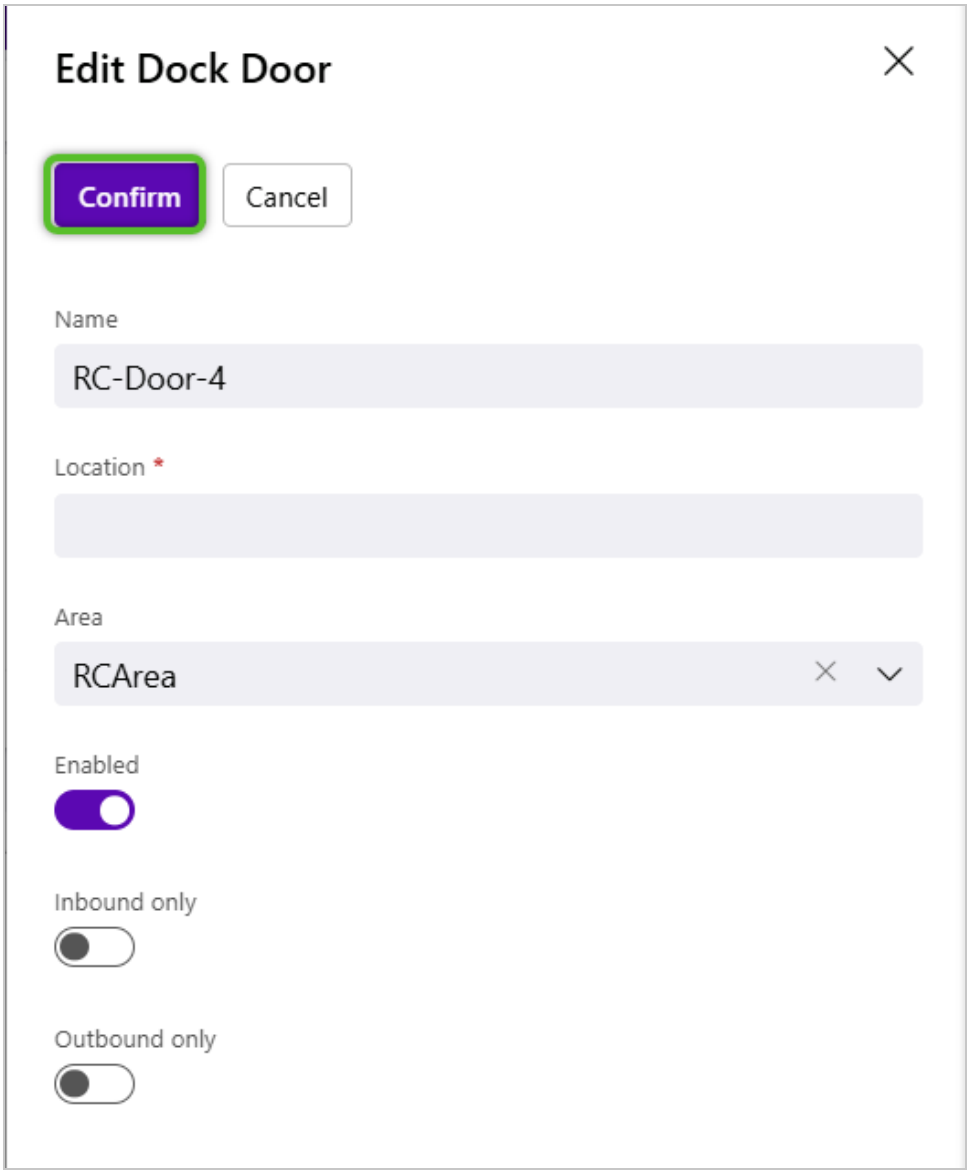
The new Dock Door will be available for use and will display on the Dock Appointment Calendar.

Edit a Dock Door

1. Locate the Dock Door to be updated, then click the **Dock Door** name.

The Dock Door will open for editing.

2. In the **Edit Dock Door** window, make any necessary updates, then click the **Confirm** button in the top left corner.



Check In a Dock Appointment

Dock Appointment Check-In occurs when the truck first arrives at the warehouse and allows users to capture driver and truck details, as well as assign a Dock Door.

The Dock Door assigned does not have to be the one the Appointment was originally scheduled for, nor does a Dock Door have to be assigned at this step. While this step does have to be completed to process a Dock Appointment, all information requested is optional.

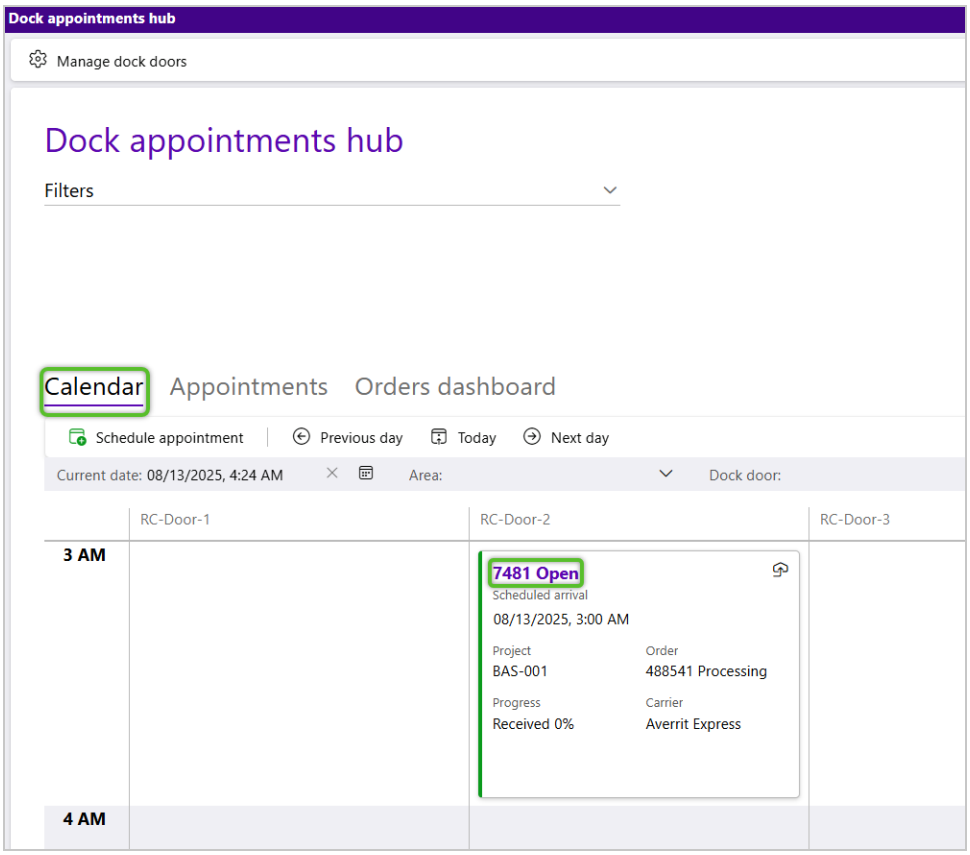
Prerequisites

- Dock Doors

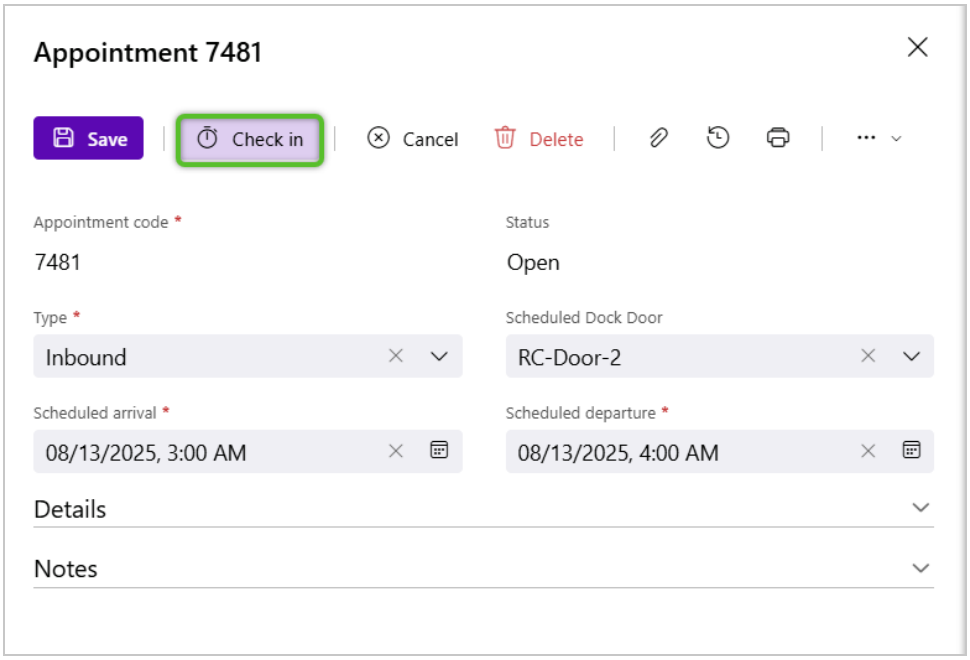
1. Click the **Dock Appointment** to be checked in on the **Calendar** tab.

Note

Dock Appointments can only be checked in when they have the **Open** status.



2. In the **Dock Appointment Editor** window, click **Check In** at the top.



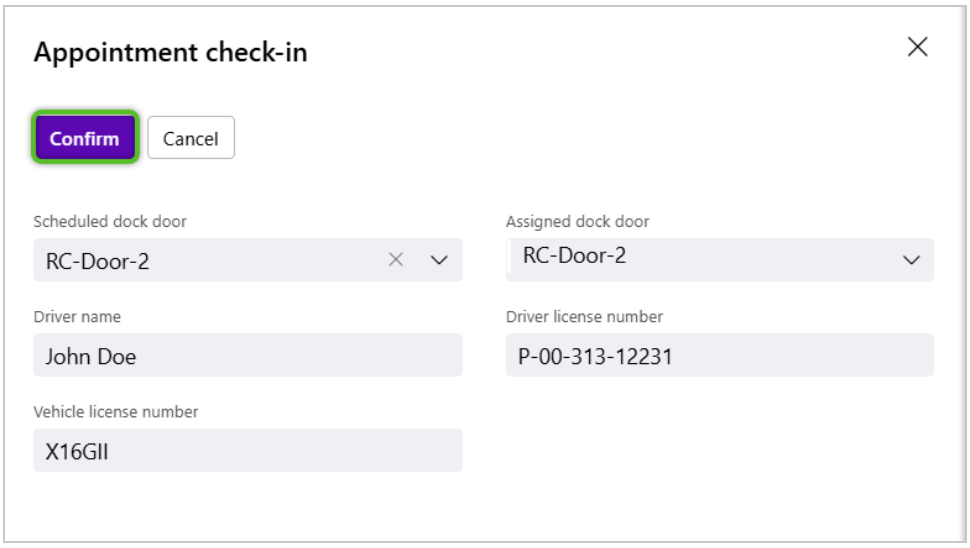
3. In the **Check In Appointment?** window, enter the optional **Driver Name**, **Driver License Number**, and **Vehicle License Number**.

Note

In the **Check in Appointment?** window, all fields are optional, including the Assigned Dock Door field. However, if the Assigned Dock Door is left empty, the Appointment's Status will not update to **Door Assigned**, but instead to **In Yard**.

4. Finally, click the **Confirm** button to check in the Dock Appointment.

On the **Calendar** tab, the Dock Appointment's card will show as **Door Assigned** when a door is set in the Assigned Dock Door field, otherwise it will show as **In Yard**. On the **Orders** tab, the **Appointments** field will show as **[Dock Appointment Lookup]** for **[Assigned Dock Door]**.



The checked in Dock Appointment will appear on the Calendar with the Door Assigned or In Yard status.

Process a Dock Appointment

Marking a Dock Appointment In Process is an optional step that occurs when the truck is at the Dock Door and actively unloading.

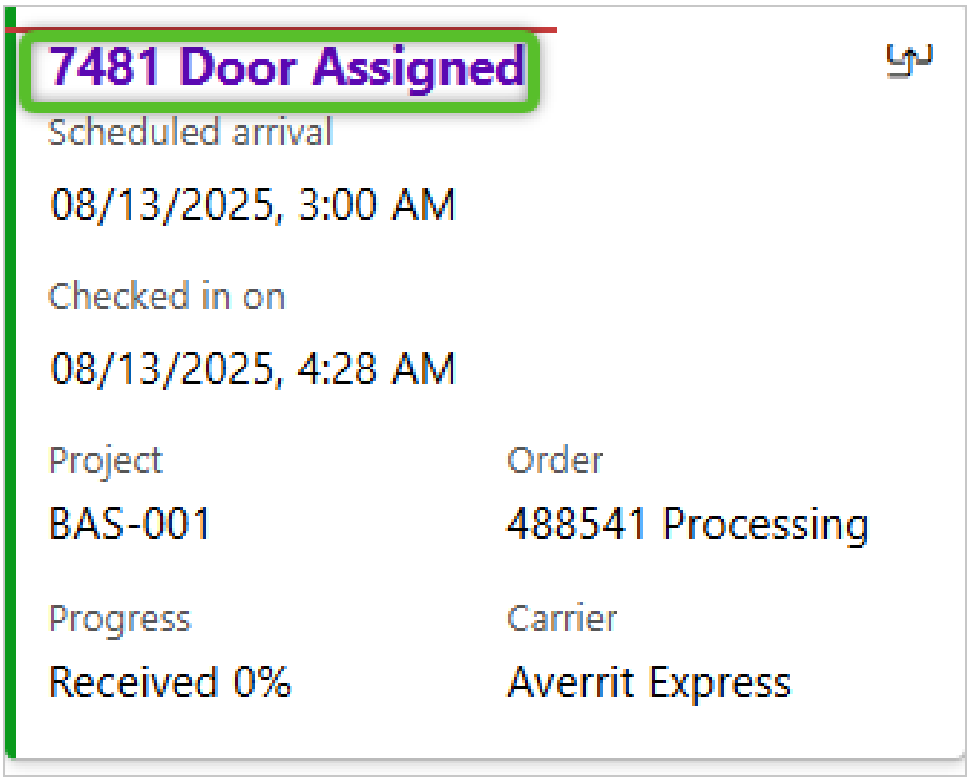
Prerequisites

- Dock Doors

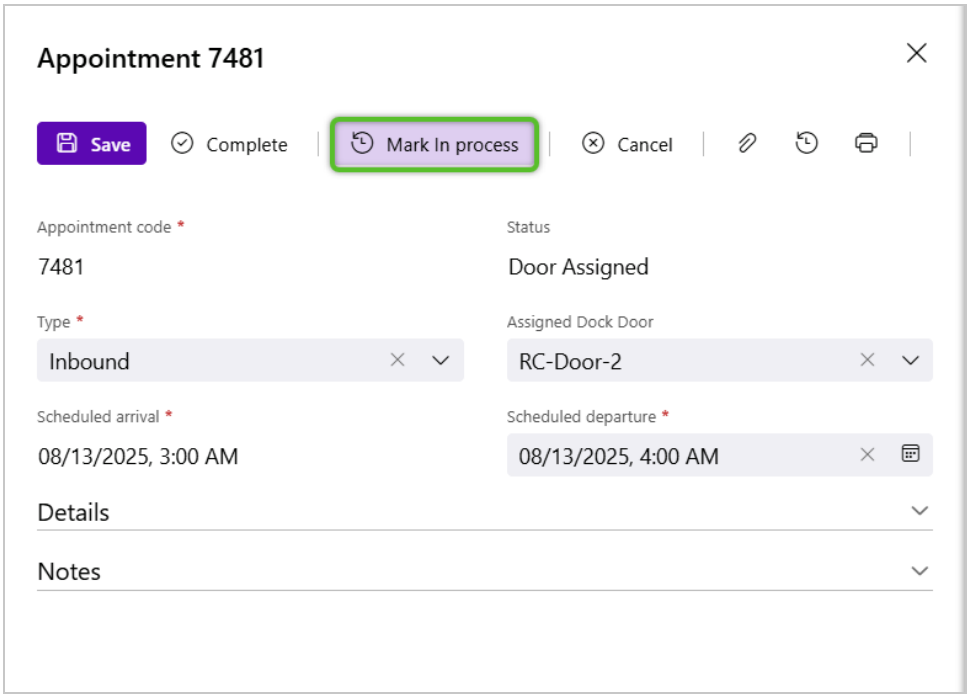
1. Click the Dock Appointment to be processed.

Note

Dock Appointments can only be processed after they have been checked in.

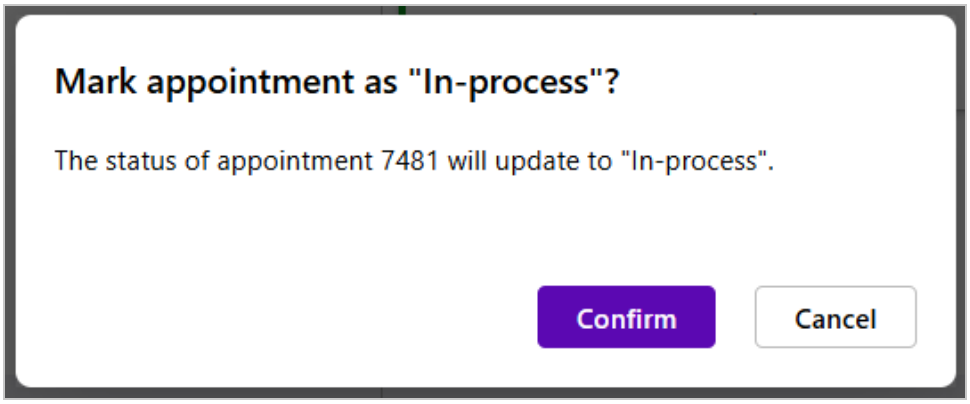


2. In the **Dock Appointment Editor** window, click **Mark In Process** at the top.



3. In the **Mark In Process Appointment** window, click the **Confirm** button to confirm that the Dock Appointment is now in process.

On the **Calendar** tab, the Dock Appointment's card will show as **In Process**. On the **Orders** tab, the Appointment field will show as **[Dock Appointment Lookup]** for **[Assigned Dock Door]**.



The In Process Dock Appointment will appear on the Calendar with the updated status.

Complete a Dock Appointment

A Dock Appointment can be completed when the truck is leaving/has left the Dock Door, freeing it up for another truck.

Completed Dock Appointments are only visible in Footprint for review and management purposes when the Status filter includes Completed Dock Appointments.

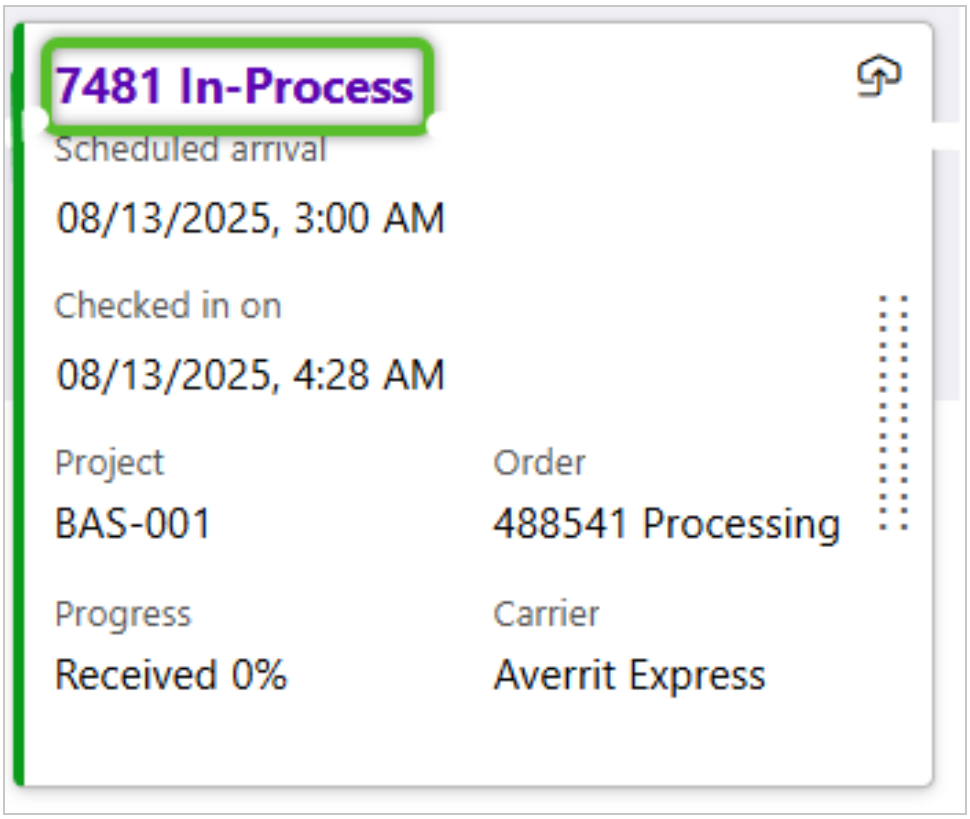
Prerequisites

- Dock Doors

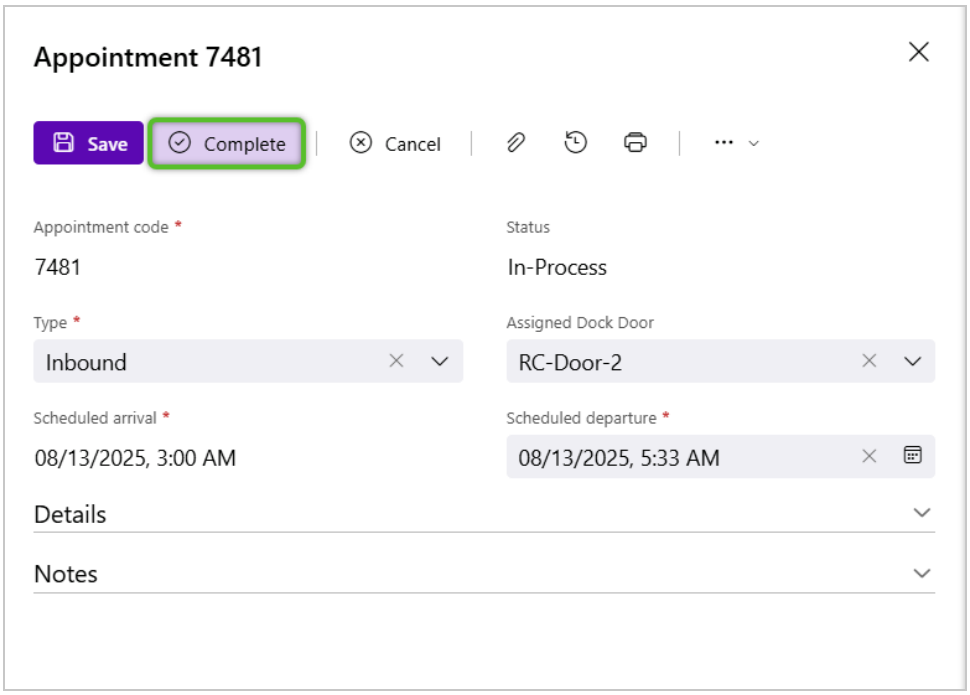
1. From the **Dock Appointments Hub** or a **Calendar** tab, click the Dock Appointment to be completed.

Note

Dock Appointments can only be completed after they have been checked in and have the **In Yard**, **In Process**, or **Door Assigned** status.

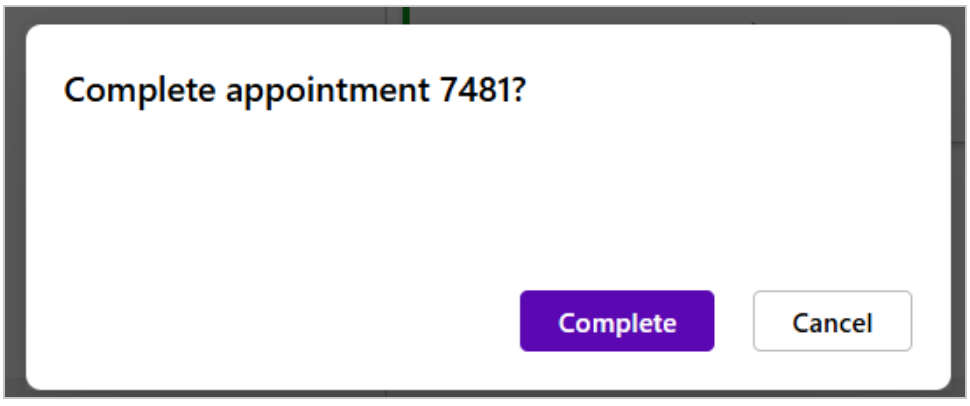


2. In the **Dock Appointment Editor** window, click **Complete** at the top.



3. In the **Complete Appointment?** window, click the **Yes** button to complete the Dock Appointment.

On the **Calendar** tab, the Dock Appointment's card will show as **Completed**. On the **Orders** tab, the Appointment field will show as **[Dock Appointment Lookup]** for **[Assigned Dock Door]**.



The completed Dock Appointment will no longer appear on the Calendar unless the Status filter includes Completed appointments.

Create an Inbound Load Container

Load Containers group Orders of incoming or outgoing Materials together, specify Containers for the Inventory, and create a Loading Sequence for the containers.

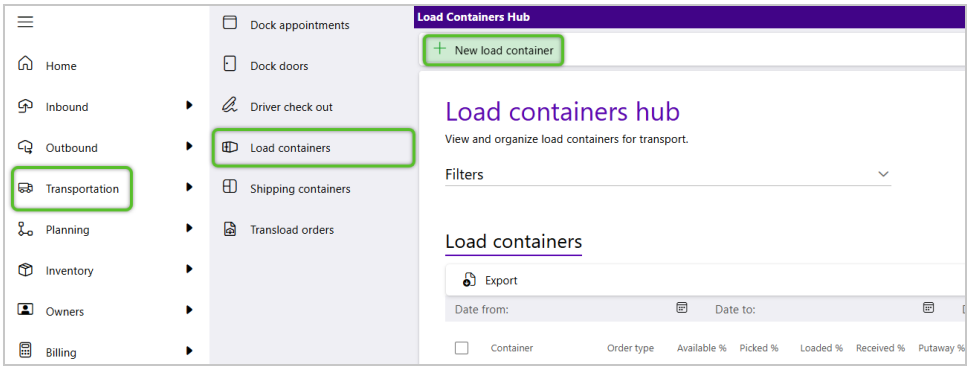
Prerequisites

- Warehouse
- Locations
- Materials
- Container Types
- Inbound or Outbound Shipment

1. Click **Transportation** in the left navigation menu, then select **Load Containers**.

The **Load Containers Hub** will display both Inbound and Outbound Load Containers.

2. Click the **+ New Load Container** option in the top toolbar.



In the **Create a Load Container** window, the **Lookup Code** is populated and can be updated.

3. Select a **Warehouse** if one is not already set.

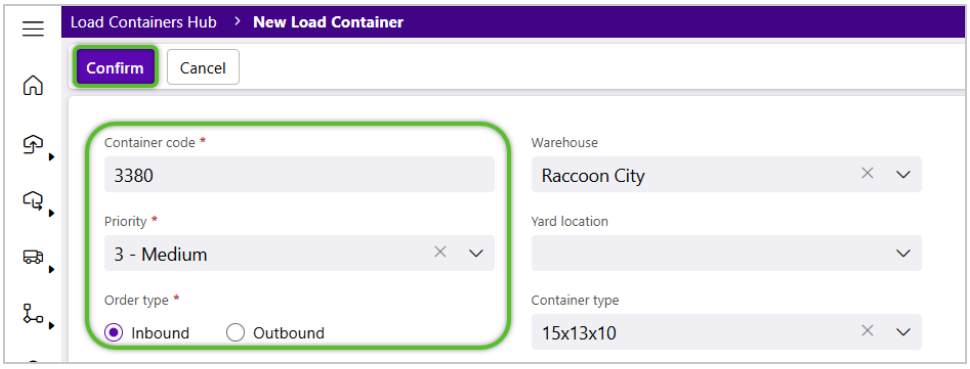
4. Set the required **Priority** for the Inbound Load Container.

5. Enter the optional **Yard Location**.

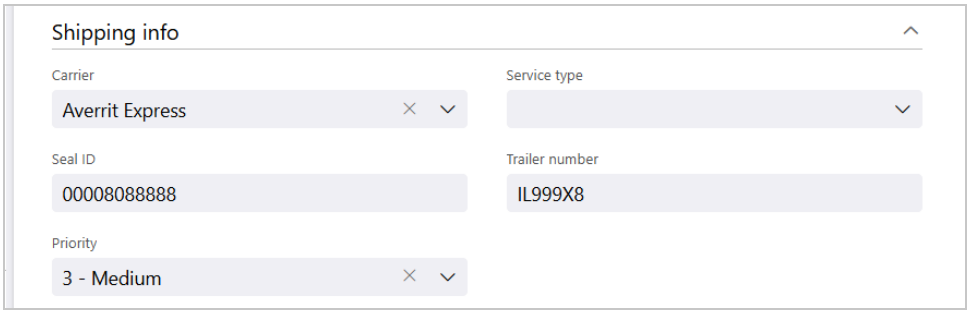
6. Select the required **Order Type**, indicating it's an Inbound Load Container.

7. Select the optional **Container Type**.

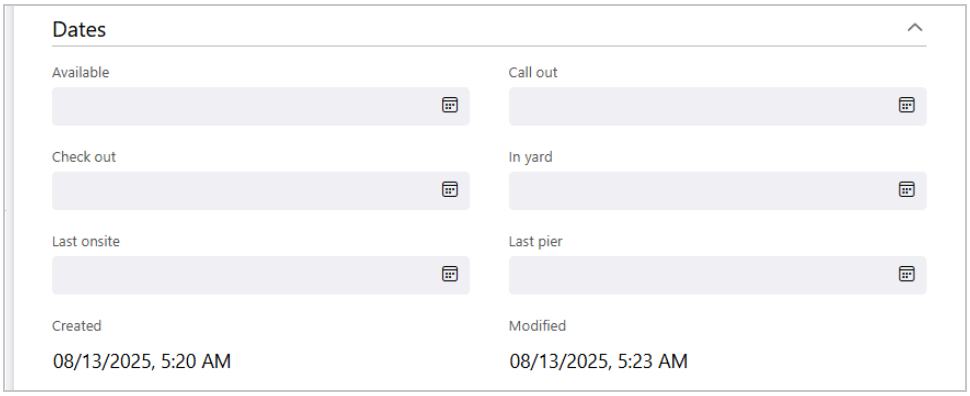
8. Click the **Confirm** button to create the new Inbound Load Container and continue adding details and Orders.



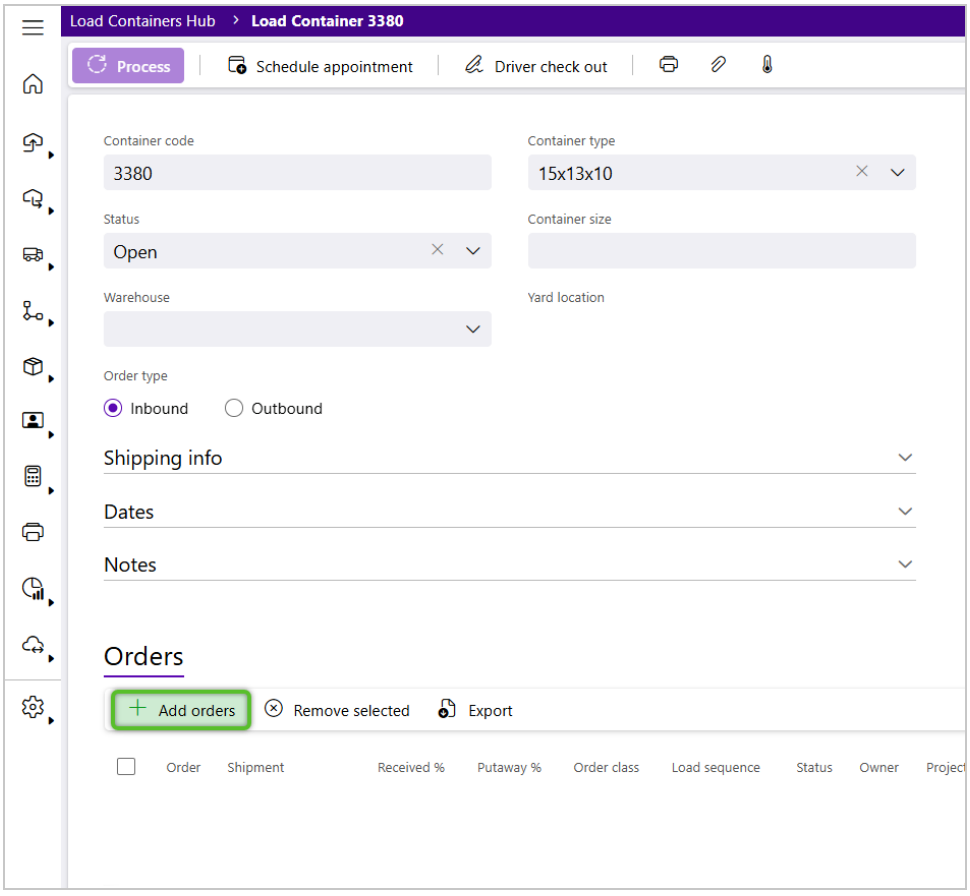
9. Add optional **Shipping Info**, such as the **Carrier**, **Trailer Number**, and **Notes**.



10. Set optional **Dates** related to the Inbound Load Container, such as **Available**, **Call Out**, **Check Out**, and **Last Onsite**.



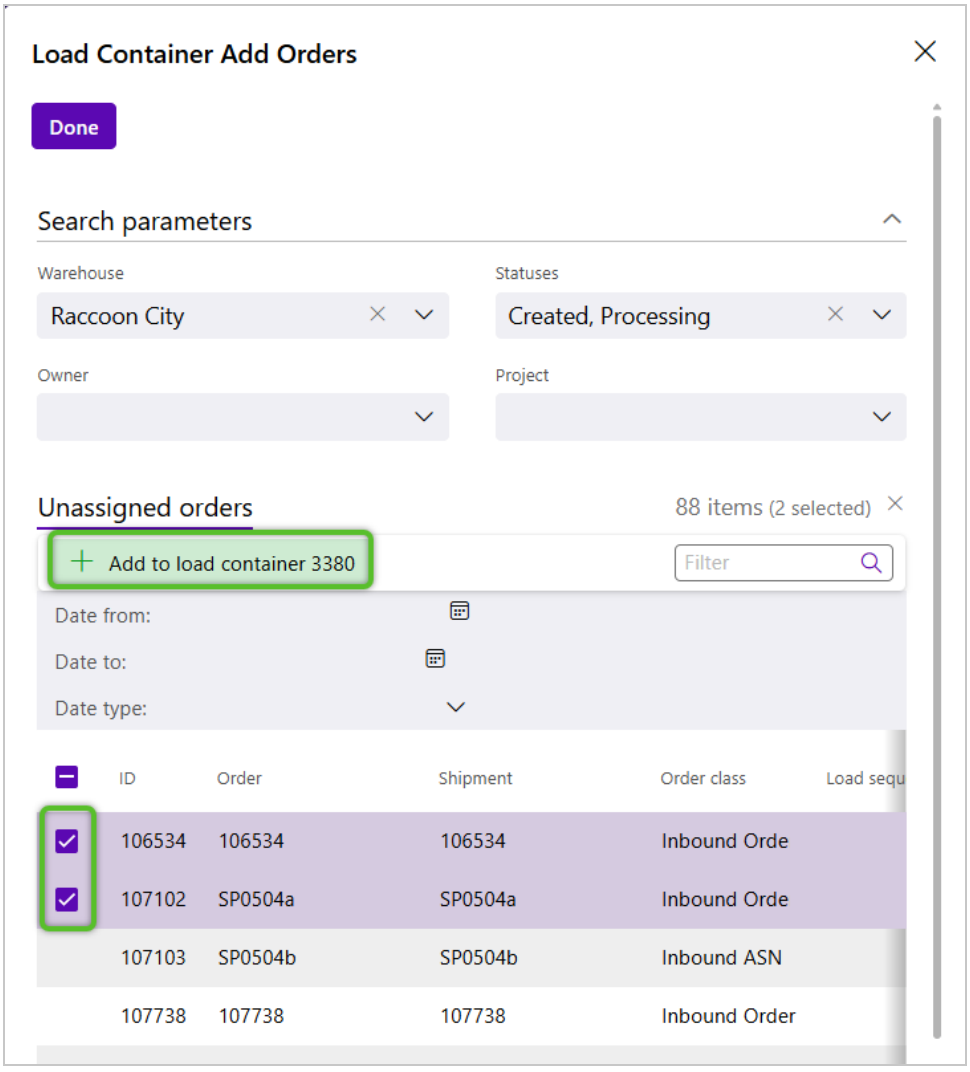
11. Add Orders to the Load Container by clicking the **+ Add Orders** option in the **Orders** tab at the bottom.



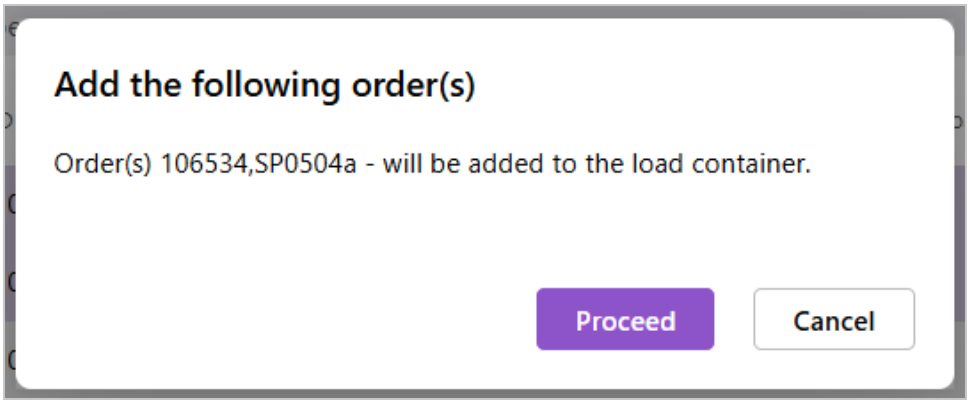
Tip

If creating a Load Container during the creation of an Order, the Order will automatically be added to the Container, so it is not necessary to add it here.

12. In the **Load Container Add Orders** window, locate and select the **Unassigned Orders** for the Load Container, then click the **+ Add to Load Container #** option.

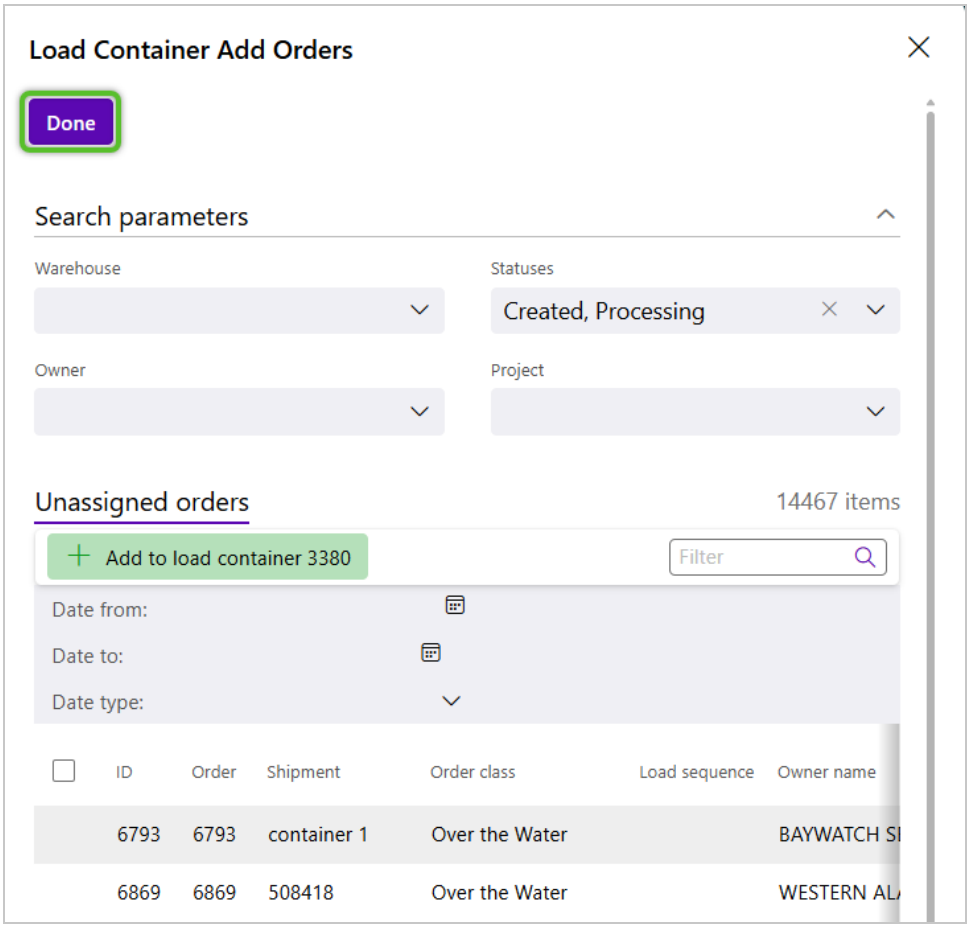


13. Review the Orders to be Added to the Load Container, then click the **Proceed** button.



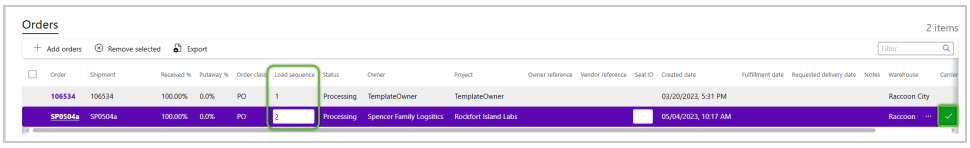
14. Click the **OK** button in the confirmation window.

15. Continue adding Orders to the Load Container and when ready, click the **Done** option at the top.



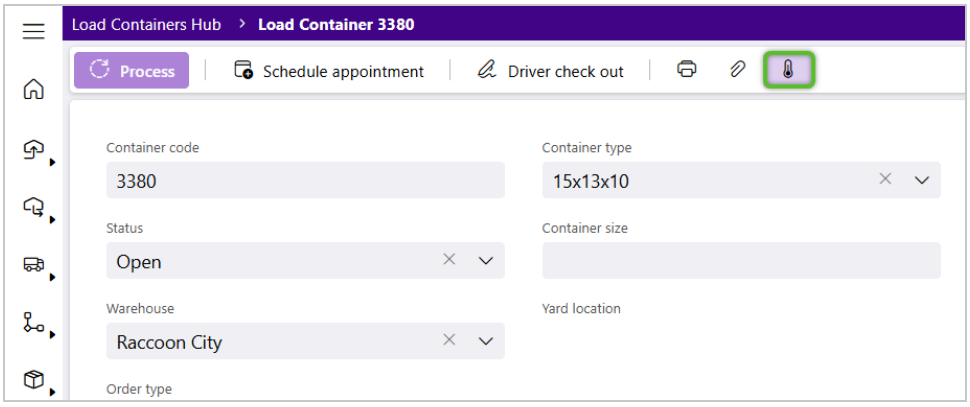
The Orders assigned to the Load Container will be listed in the **Orders** tab.

16. To specify the sequence in which to Load or Receive the Orders listed in the Orders tab, click into their **Load Sequence** column, enter the appropriate number, then click the green check mark at the end of the row. Do this for each Order.

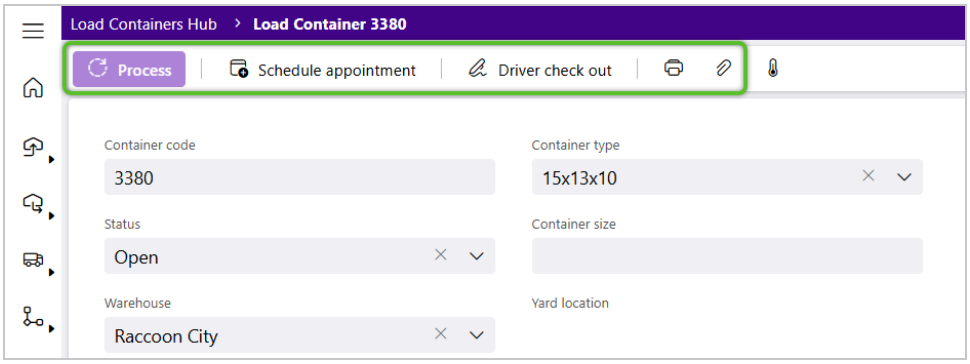


Each number in the sequence corresponds with a stop in the delivery. For example, for Inbound Orders, the first in the sequence will have been the last stop of the delivery.

17. To add a **Temperature Reading** for the Load Container, click the temperature icon on the Load container toolbar and record the reading on the flyout.



18. To **Create a Dock Appointment** for the Load Container, **Process** the Load Container, add **Attachments**, and **Print** related files, use the icons in the top toolbar.



The new Inbound Load Container will appear in the **Load Containers Hub** and be available for use.

Create an Outbound Load Container

Load Containers group Orders of incoming or outgoing Materials together, specify Containers for the Inventory, and create a Loading Sequence for the containers.

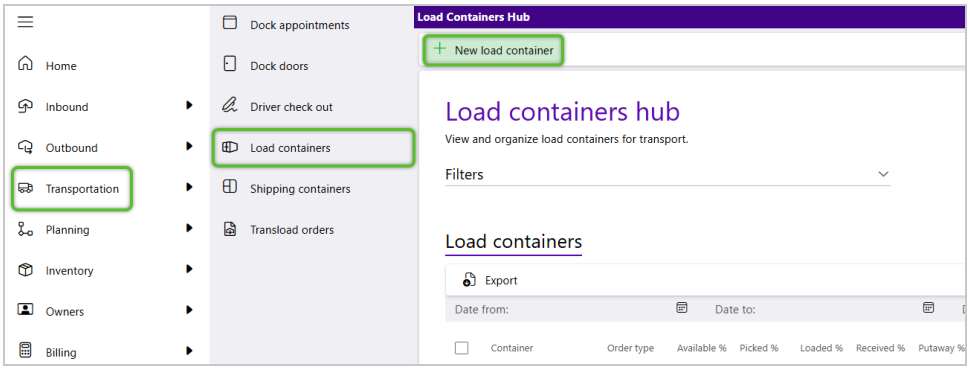
Prerequisites

- Warehouse
- Locations
- Materials
- Container Types
- Inbound or Outbound Shipment

1. Click **Transportation** in the left navigation menu, then select **Load Containers**.

The **Load Containers Hub** will display both Inbound and Outbound Load Containers.

2. Click the **+ New Load Container** option in the top toolbar.



In the **Create a Load Container** window, the **Lookup Code** is populated and can be updated.

3. Select a **Warehouse** if one is not already set.

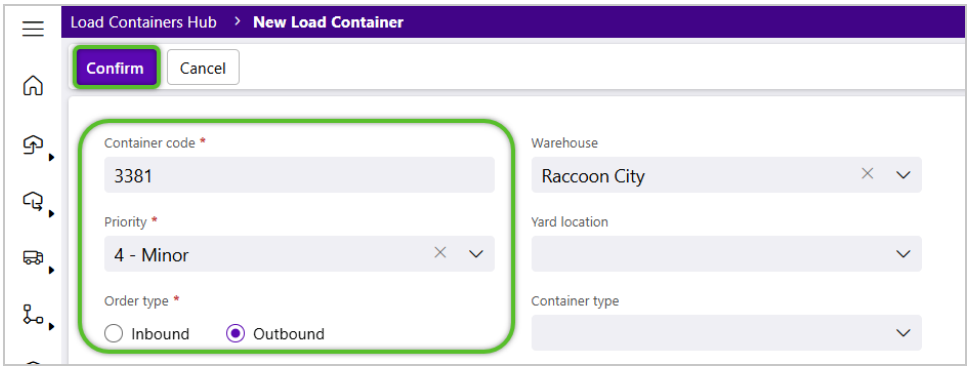
4. Set the required **Priority** for the Load Container.

5. Enter the optional **Yard Location**.

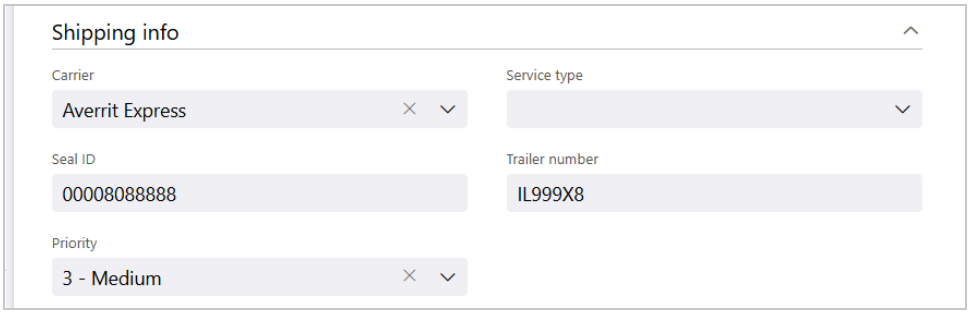
6. Select the required **Order Type**, indicating it's an Outbound Load Container.

7. Select the optional **Container Type**.

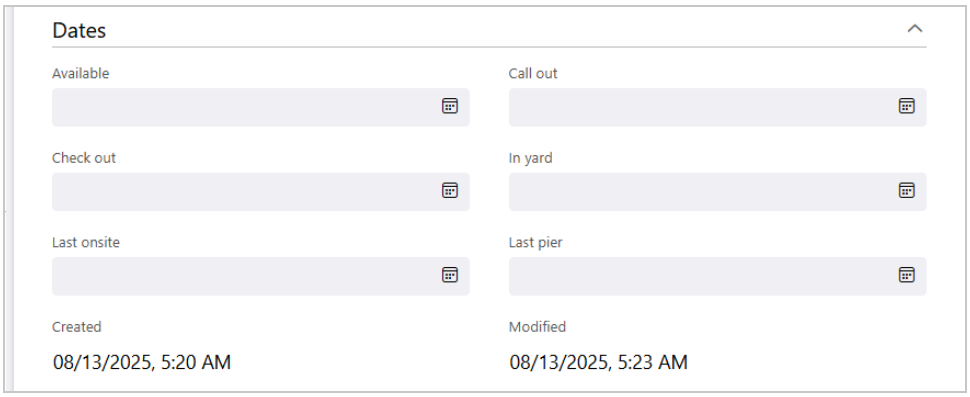
8. Click the blue **Confirm** button to create the new Outbound Load Container and continue adding details and Orders.



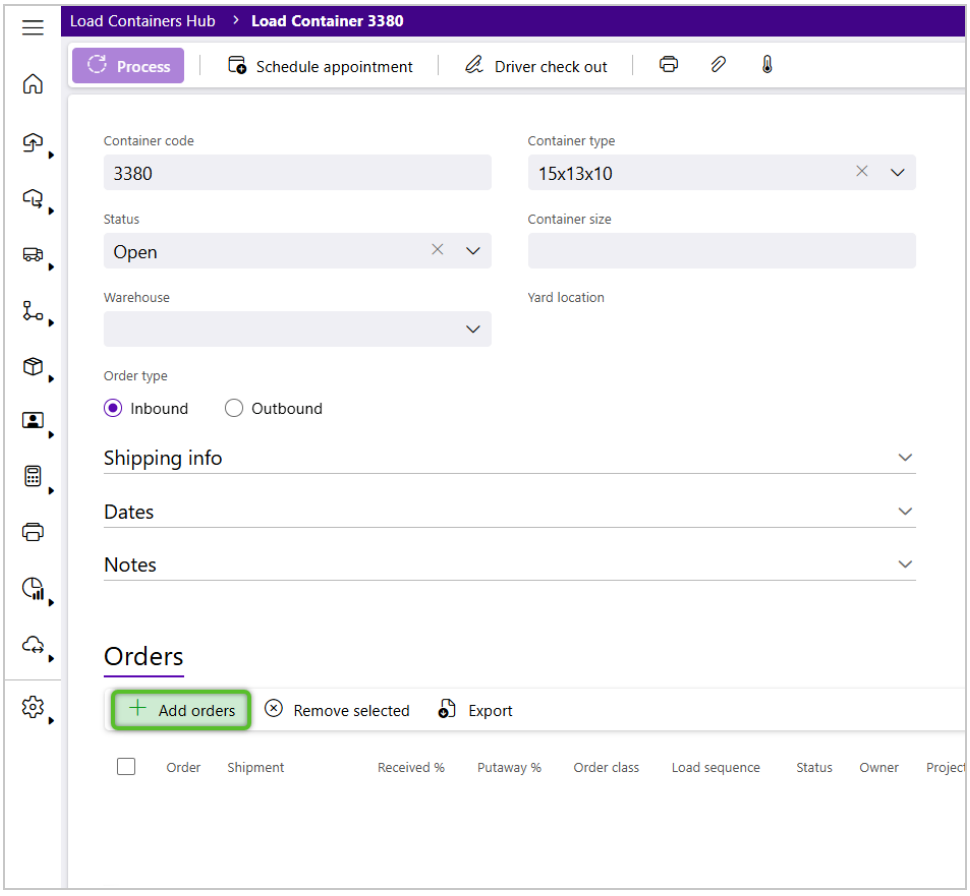
9. Add optional **Shipping Info**, such as the **Carrier**, **Trailer Number**, and **Notes**.



10. Set optional **Dates** related to the Load Container, such as **Available**, **Call Out**, **Check Out**, and **Last Onsite**.



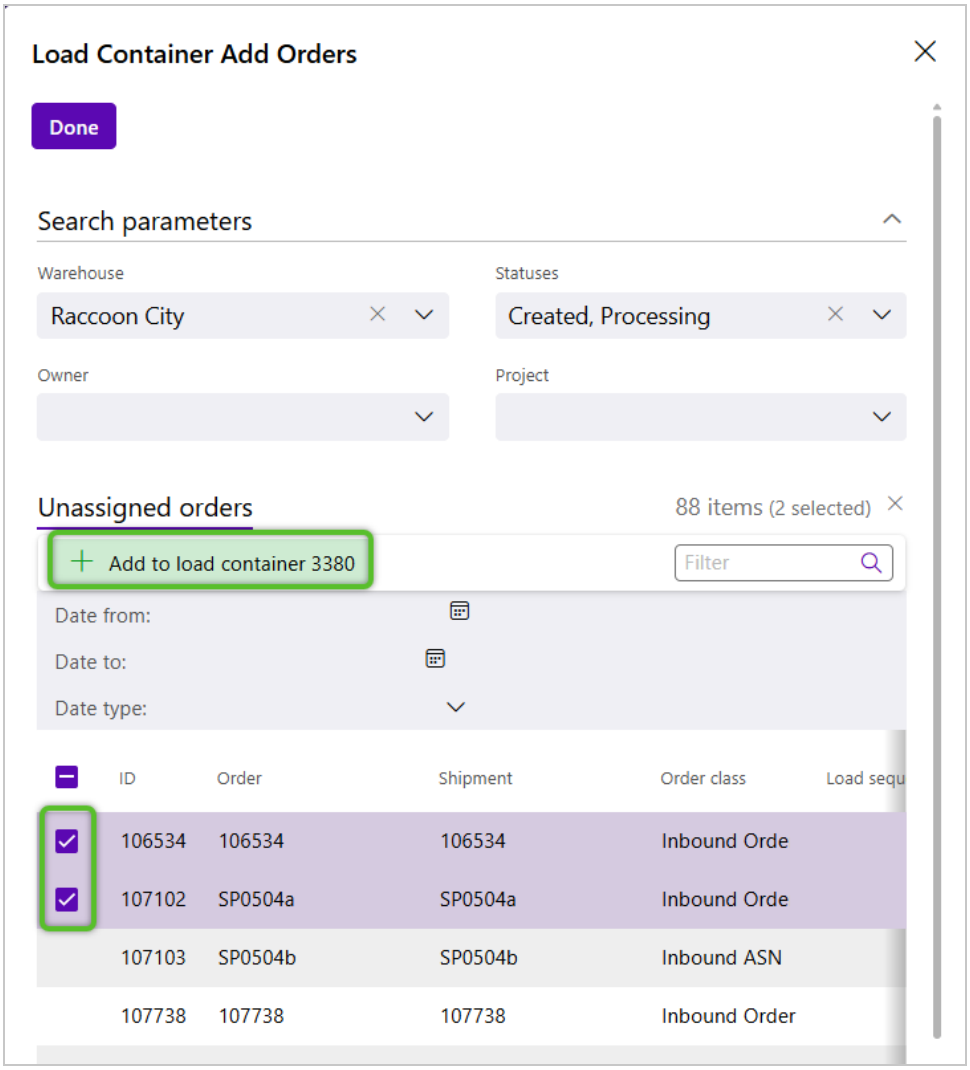
11. Add Orders to the Load Container by clicking the **+ Add Orders** option in the **Orders** tab at the bottom.



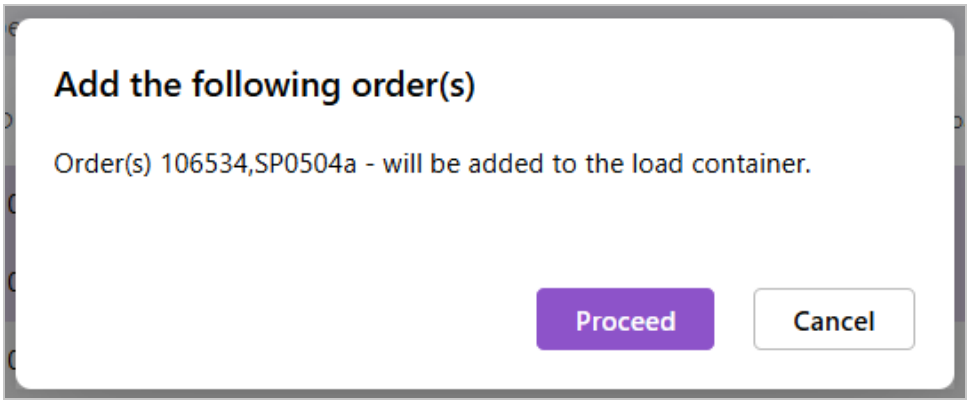
Tip

If creating a Load Container during the creation of an Order, the Order will automatically be added to the Container, so it is not necessary to add it here.

12. In the **Load Container Add Orders** window, locate and select the **Unassigned Orders** for the Load Container, then click the **+ Add to Load Container #** option.

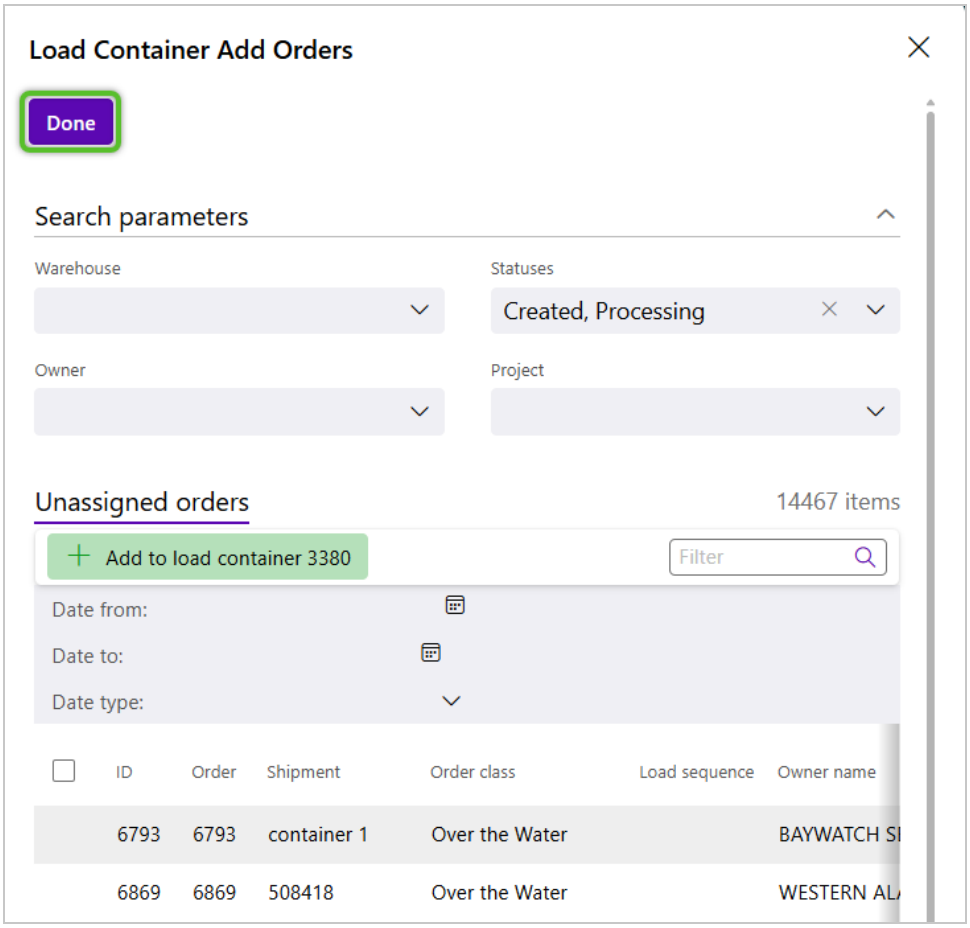


13. Review the Orders to be Added to the Load Container, then click the blue **Proceed** button.



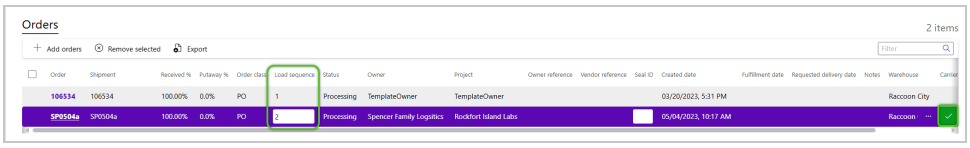
14. Click the blue **OK** button in the confirmation window.

15. Continue adding Orders to the Load Container and when ready, click the **Done** option at the top.



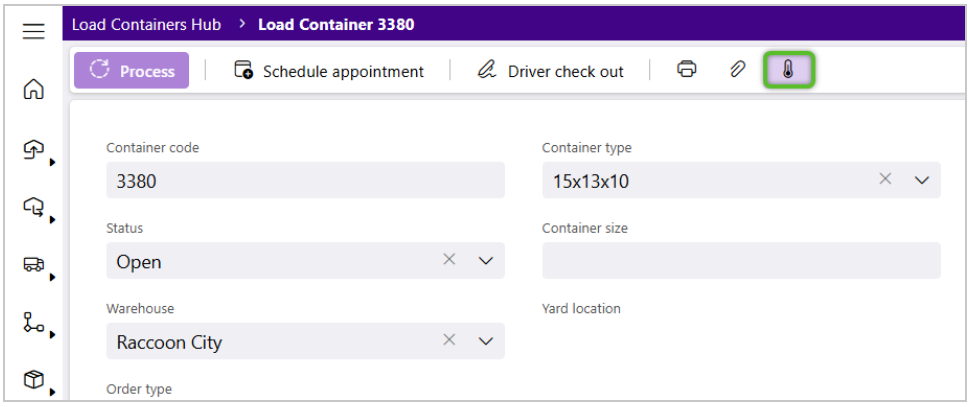
The Orders assigned to the Load Container will be listed in the **Orders** tab.

16. To specify the sequence in which to Load or Receive the Orders listed in the Orders tab, click into their **Load Sequence** column, enter the appropriate number, then click the green check mark at the end of the row. Do this for each Order.

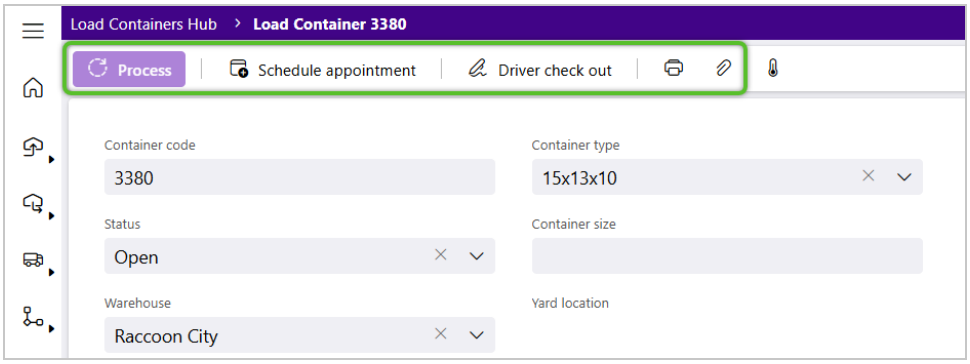


Each number in the sequence corresponds with a stop in the delivery. For example, for Inbound Orders, the first in the sequence will have been the last stop of the delivery.

17. To add a **Temperature Reading** for the Load Container, click the temperature icon on the Load container toolbar and record the reading on the flyout.



18. To **Create a Dock Appointment** for the Load Container, **Process** the Load Container, add **Attachments**, and **Print** related files, use the icons in the top toolbar.



The new Outbound Load Container will appear in the **Load Containers Hub** and be available for use.

Perform Driver Check Out

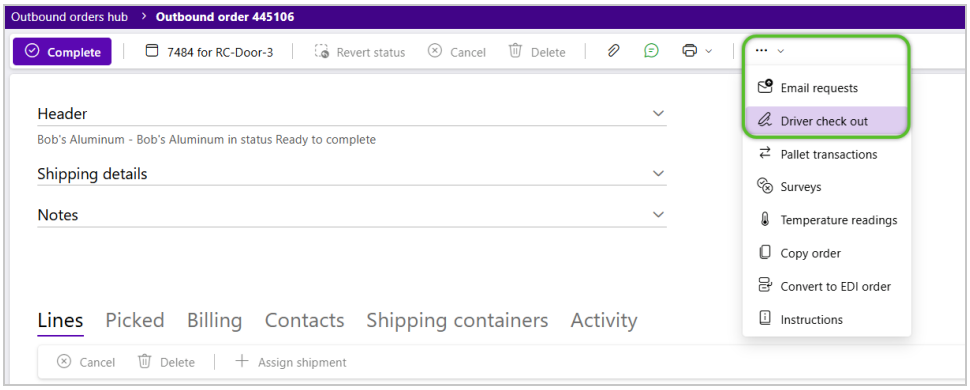
When completing an Outbound Order, **Driver Check Out** allows the driver's signature to be captured and the signed Bill of Lading to be printed. Driver Check Out can be done from the Transportation Hub, as well as from an Outbound Order.

Tip

You may have to select **Completed** in the Status filter to locate the Outbound Order.

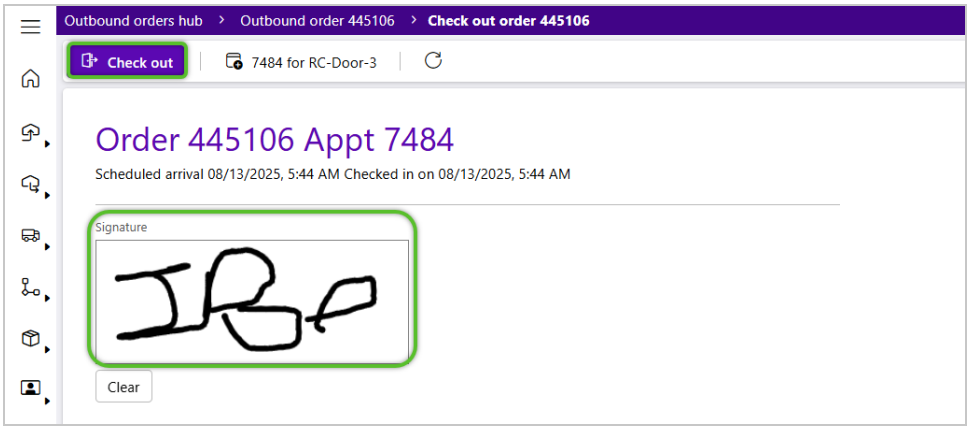
1. From the Outbound Order, click the **Options** dropdown, then select **Driver Check Out**.

Alternatively, click **Transportation** in the left navigation menu and select **Driver Check Out**. Enter the Appointment number for the Order, then click the **Driver Check Out**.

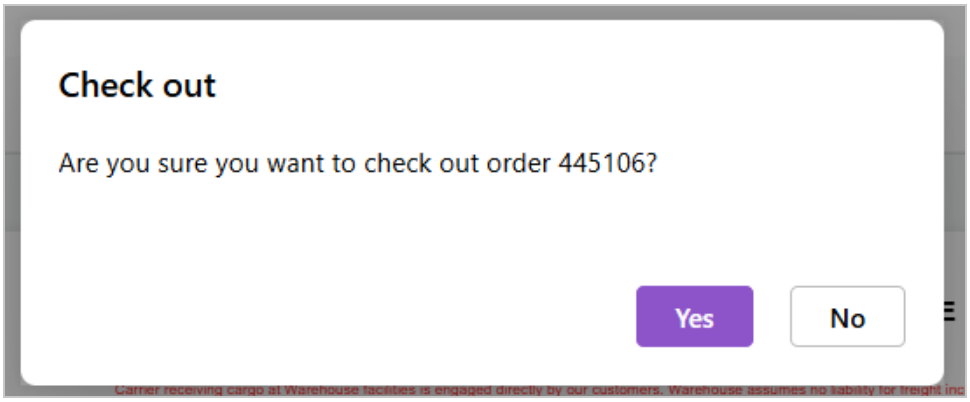


2. Capture the driver's signature using a handheld signature capture device.

3. Click the blue **Check Out** button in the top left.

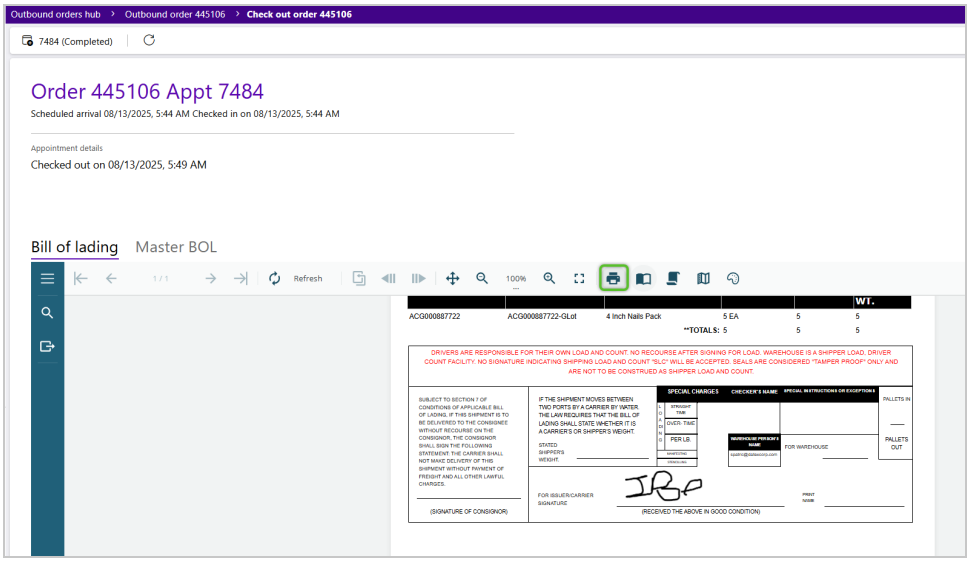


4. Click the **Yes** button in the confirmation window.



5. In the **Bill of Lading** window at the bottom of the screen, click the **Printer** icon to print the signed Bill of Lading.

The Bill of Lading can also be accessed from the **Reports** tab of the order.



Outbound Orders Guide

Sections

- Overview
- Outbound Hub
- Outbound Order
- Outbound Process

Overview

From the Outbound Hub, users can create and Outbound Orders and their Waves, Warehouse Transfers, Carriers, and Carrier Service Types. Outbound Orders specify which Materials are being sent out, their Owners, where they're being sent, and how they're getting to their destination.

The Outbound process consists of creating the Outbound Order, creating a Wave to get the Allocation and Picking processes under way, Packing and Loading the Inventory on the truck to send it out into the world, and finally, completing the order so necessary Billing information can be processed.

Outbound Hub

The Outbound Hub allows you to create and manage all Outbound Orders created in your system. All active Outbound Orders are listed, defaulting to the most recent Outbound Orders at the top. In the top, right corner are three tiles indicating the number of **Picked Orders Today**, **Completed Today**, and **Picked Units Today**.

Icons along the top of the Outbound Hub allows users to create new Outbound Orders. For more details, please jump to our **Create an Outbound Order** section below. Users can also **Manage Carriers** and the **Carrier Service Types** from the Outbound Hub.

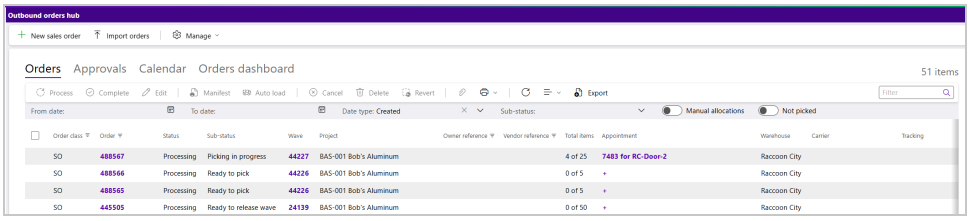
Search and filter options are available to quickly locate Outbound Orders for review and management. Users can filter by Owner, Project, Material, Warehouse, Status, Reference, Carrier, Service, and Date ranges for all Date Types (Created, Requested Delivery, Cancel Threshold, Modified, and so on).

Outbound Hub Tabs

The Outbound Orders display in the **Orders** tab, but can also be viewed on the **Calendar** and **Orders Dashboard** tabs. Each tab on the Outbound Hub displays it's own set of information and options for managing that information. Expand the sections below for more details about each tab.

Orders

The **Orders** tab lists all Outbound Orders, with the most recent at the top.



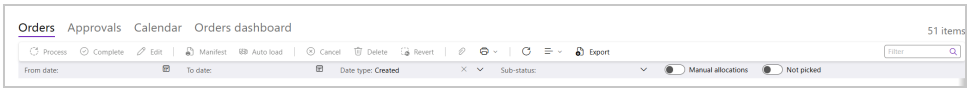
Order Information

Order:	The Lookup number for the Order.
Status:	The current Status of the Order.
State:	The current State of the Order.
Wave:	The ID for the Wave associated with 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.
Appointment:	The unique ID number for the Appointment. This link opens the Dock Appointment Editor. The plus icon can be clicked to create a Dock Appointment for the Inbound Order.
Created by:	The email address of the user logged in when the Order was created.
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.
Cancel Threshold:	The Cancel Threshold for the Order.
Shipped Date:	The date the Order was Shipped.
Cartonized:	A checkbox indicating whether or not the Order is Cartonized.
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.
Warehouse:	The Warehouse where the Order was Created.
Carrier:	The Carrier for the Order's Dock Appointment.
Tracking:	The Tracking ID for the Order.
Ship To:	The Ship To Address for the Order.
Delivery Country:	The Country to which the Outbound Order will be delivered.
Notes:	Any Notes for the Order.
Pickup Date:	The date and time the Order should be picked up.

Orders Tab Toolbar

The **Orders** tab toolbar provides options to manage selected Outbound Orders, such as **Process**, **Manifest**, **Auto-Pick**, **Auto-Load**, **Complete**, and more.



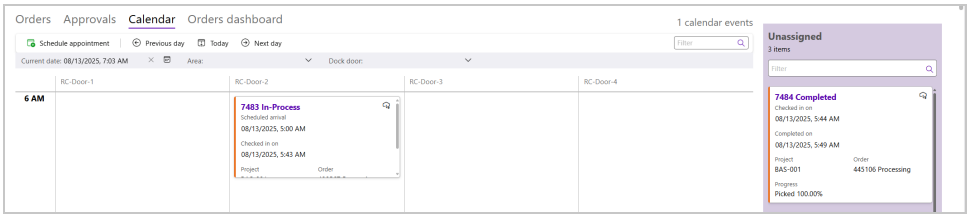
Process:	The **Process** option processes the selected Order.
Complete:	The **Complete** option completes the selected Order.
Update:	The **Update** option opens the selected Order for further review and updates.
Manifest:	The **Manifest** option opens the Order's Manifest for management and printing.
Auto Pick:	The **Auto-Pick** option auto-picks all Inventory for the selected Outbound Order.
Auto Load:	The **Auto-Load** option auto-loads the selected Outbound Order.
Cancel:	The **Cancel** option stops selected Order once it's been started.
Delete:	The **Delete** icon deletes selected Order.
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.
Select	The **Select Fields** option allows users to select which fields are visible

Fields:	for Orders listed in the Outbound Hub.
Attachments:	The **Attachments** paperclip icon opens the Attachments window for the selected Order.
Refresh:	The **Refresh** option refreshes the list of Outbound Orders.
Export List:	The **Export** option exports the details of the Order in an Excel file (where available).

Calendar

The **Calendar** tab displays Dock Appointments for Outbound Orders, along with options to create and edit Dock Appointments, and navigate them by day, time, Area, and Dock Doors.

Appointments with no dock Door assigned will be listed in the blue Unassigned section along the right.

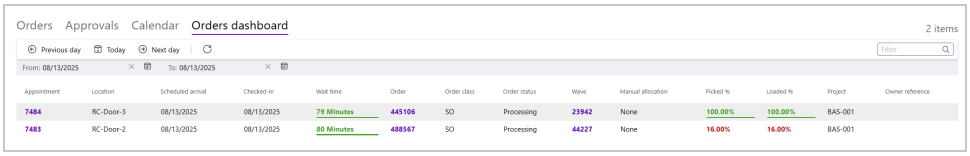


Dock Appointment Information

Dock Door:	The Dock Door for the Appointment is displayed as the column header.
Appointment ID and Status:	The unique ID number for the Appointment and the Status of the Appointment. For example, Open. This link opens the Dock Appointment Editor.
Order Type:	An Icon in the top right that indicates the Dock Appointment is for an Outbound Order.
Scheduled Arrival:	The Order's Scheduled Arrival date and time.
Checked In On:	The date and time of the Order's Check In, when applicable.
Project:	The name of the Order's Project.
Order:	The Order number and the Order's Status.
Progress:	The Progress of the Order's Dock Appointment.
Carrier:	The Carrier for the Order's Dock Appointment.

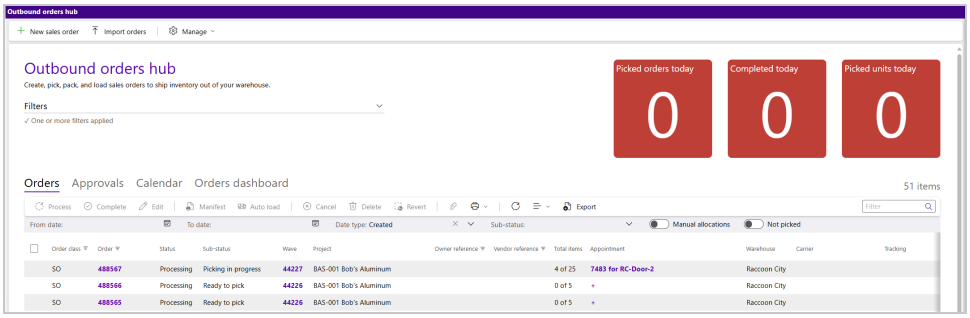
Orders Dashboard

The **Orders Dashboard** tab displays Outbound Orders sorted by upcoming Scheduled Arrival times by default. The Outbound Orders Dashboard offers options to view and update both the Outbound Order's Dock Appointment and the Outbound Order itself.



Orders Dashboard Information

Appointment ID:	The unique ID number for the Appointment. This link opens the Dock Appointment Editor.
Location:	The Order's Appointment Dock Door.
Scheduled Arrival:	The Order's Scheduled Arrival date and time.
Checked In On:	The date and time of the Order's Check In, when applicable.
Wait Time:	The number of minutes since the Order was Checked In.
Order:	The Lookup number for the Order.
Order Class:	The Order Class the Order has been assigned to.
Order Status:	The Order's Status.
Wave:	The ID of the Wave associated with the Order.
Manual Allocation:	A check box indicating whether or not the Order requires Manual Allocation.
Picked %:	The percentage of the Order that has been Picked.
Loaded %:	The percentage of the Order that has been Loaded.
Project:	The Name of the Project associated with the Order.
Owner Reference:	The Reference Number given to the Order for the Owner's Reference.



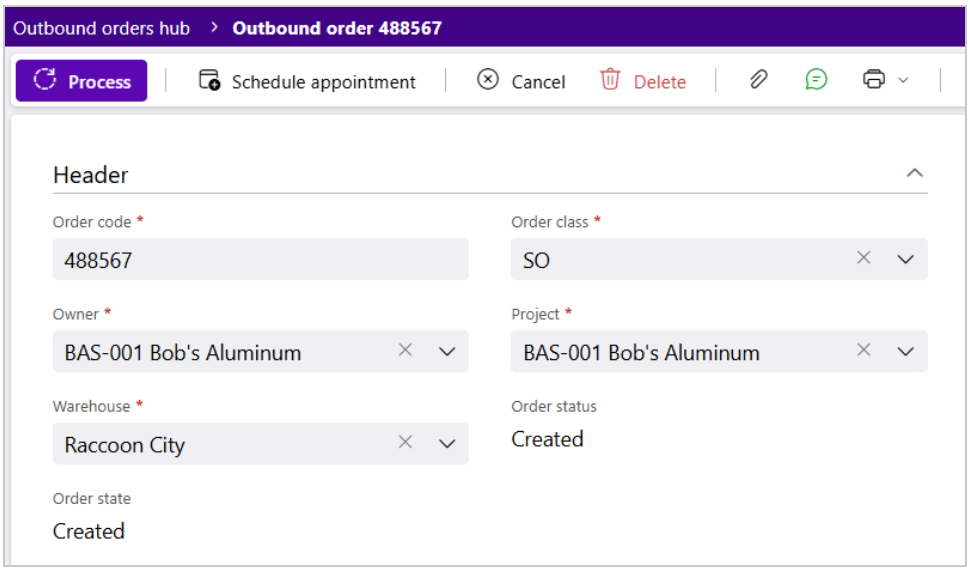
Outbound Order

The Outbound Order can be opened for further review and management by clicking the blue Outbound **Order** number. In the top right corner are three tiles indicating the **Total Amount**, **Total Picked**, and **Total Gross Picked** for the Outbound Order.

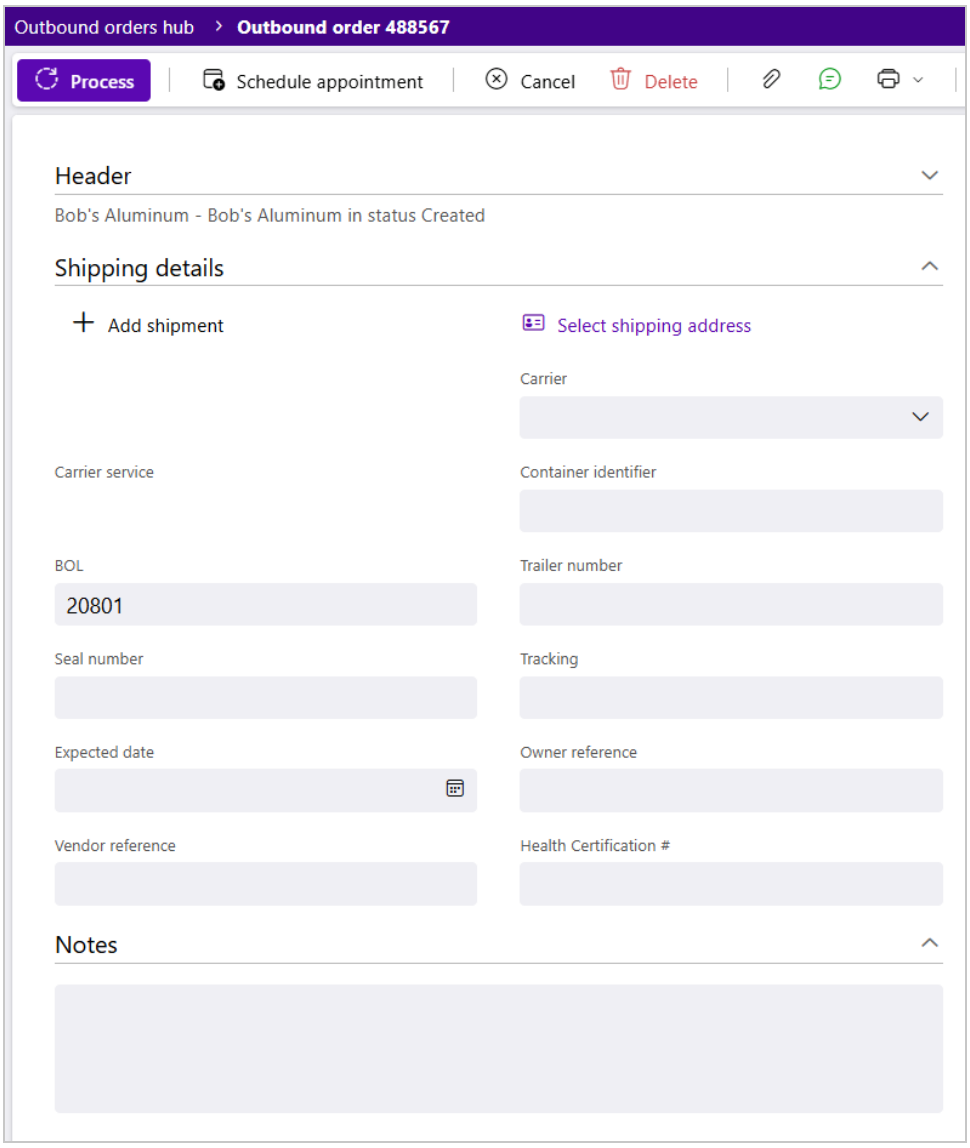
The Outbound Order's basic information will be displayed, including the **Order**number, **Order Class**, **Owner**, **Project**, **Warehouse**, **Order Status**, and **Order State**. The **Details** section can be opened for more information about the Order.

Icons along the top of the Outbound Order provide options to manage the order. For more details, please visit the **Outbound Order Toolbar** section below.

Outbound Order Details



Order: The ID number for the Order.
Order Class: The Order Class the Order has been assigned to.
Owner: The Name of the Owner for whom the Order was created.
Project: The Name of the Project associated with the Order.
Warehouse: The Warehouse where the Order was Created.
Order Status: The current Status of the Order.
Order State: The current State of the Order.


Outbound orders hub
Outbound order 488567
Process
Schedule appointment
Cancel
Delete
Header
Bob's Aluminum - Bob's Aluminum in status Created
Shipping details
Add shipment
Select shipping address
Carrier
Carrier service
Container identifier
BOL
20801
Trailer number
Seal number
Tracking
Expected date
Owner reference
Vendor reference
Health Certification #
Notes

Ship To:	The Ship To Address for the Outbound Order.
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.
Service:	The Service specified for the Order.
Owner Reference:	The Reference Number given to the Order for the Owner's Reference.
Container Identifier:	The Container ID specified for the Order.
BOL:	The Bill of Lading for the Order.
Trailer Number:	The Trailer Number for the Order.
Seal Number:	The Seal Number for the Order.
Tracking:	The Tracking ID specified for the Order.
Pickup Date:	The Pickup date and time specified for the Order.
Custom Fields:	Specific to your organization.
Notes:	Any Notes for the Order.

Outbound Order Toolbar

The Outbound Order toolbar provides everything needed to manage an Outbound Order. Icons in the toolbar vary depending upon the Status of the order.



Process:	The **Process** option processes the Outbound Order.
Auto Pick:	The **Auto Pick** option auto-picks all Inventory for the order.
Auto Load:	The **Auto Load** option auto-loads all Inventory for the order.
Complete:	The **Complete** option completes the Order.
Appointment:	The **Appointment** option opens the Dock Appointment window for creation or management.
Revert:	The **Revert** icon reverts an Outbound Order from the status of Picked or Canceled back to the Created status.
Cancel:	The **Cancel** option stops the Order once it's been started.
Delete:	The **Delete** icon deletes the Order.

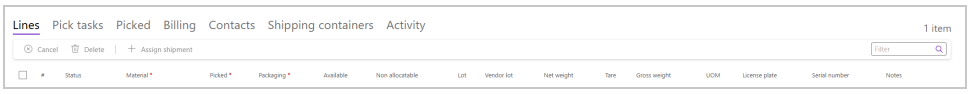
Attachments:	The **Attachments** paperclip icon opens the Attachments window for the selected Order.
Print:	The **Print** icon opens a drop-down list of all files available for the Order that can be opened and printed. If only one relevant printable exists, it will open automatically when clicking the icon.
Options... Dropdown:	The Outbound Order **Options...** dropdown icon provides the ability to **Add Comments**, **Driver Checkout**, **View & Send Auto-Emails**, **Perform Pallet Transactions**, **View Submitted Surveys**, **Add Temperature Readings**, and **Copy Order**.

Outbound Order Tabs

The Outbound Order's Order **Lines**, **Pick Tasks**, **Picked**, **Reports**, **Billing**, **Contacts**, **Instructions**, and **Activity** are listed in the tabs along the bottom. Each tab on the Outbound Order displays it's own set of information and options for managing that information. Expand the sections below for more details about each tab.

Order Lines

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



Order Line Information

#:	The Order Line Number.
Status:	The Status of the Order Line.
Material:	The Material in the Order Line.
Packaging:	The Packaging UOM of the Material in the Order Line.
Picked:	The quantity Picked out of the total quantity for the Order Line.
Available:	The quantity of Material Available for the Order Line.
Non Allocatable:	A check box indicating whether or not the Material in the Order Line is Allocatable.
Lot:	The Lot assigned to the Material in the Order Line.
Vendor Lot:	The Vendor Lot assigned to the Material in the Order Line.
Net Weight:	The Net Weight of the Material in the Order Line.
Tare:	The weight of the items in the Package, combined with the weight of the Package itself.

Gross Weight:	The Gross Weight of the Material in the Order Line.
UOM:	The Packaging UOM for the Material in the Order Line.
License Plate:	The License Plate ID for the Order Line.
Serial Number:	The Serial Number of the Material in the Order Line.
Notes:	Any Notes for the Order Line.

Pick Tasks

The **Pick Tasks** tab displays the Outbound Order's Pick Tasks, along with options to **Reallocate**, **Group by LP**, and **Cancel**.



Pick Tasks Information

Operation:	The Operation Type for the Task.
Line #:	The Order Line Number for the Pick Task.
Material:	The Material in the Pick Task.
Packaging:	The Packaging UOM of the Material in the Task.
Lot:	The Lot assigned to the Material in the Task.
Vendor Lot:	The Vendor Lot assigned to the Material in the Task.
Picked:	The quantity of Material Base UOM Picked for the Task.
Remaining:	The quantity of Material Base UOM Remaining to be Picked for the Task.
Pick Quantity:	The expected quantity of the Material for the Pick Task.
Source:	The Location from which the Materials are Picked.
Source LP:	The License Plate from which the Materials are Picked.
Target:	The Location to which the Materials are moved.
Target LP:	The License Plate to which the Materials are moved.
Target Container:	The Container ID of the shipping container for the Materials in the Pick Task.

Picked

The **Picked** tab displays the Outbound Order's Picked Inventory, along with options to **Unpick**, **Unload**, and **Transfer** selected inventory.

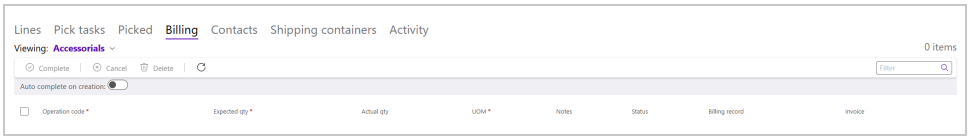


Picked Inventory Information

Line #:	The Order Line Number for the Picked Inventory.
Material:	The Material already Picked for the Order.
Total Expected:	The Total Expected Quantity of the Picked Inventory.
Actual:	The Actual Quantity of Picked Inventory.
License Plate:	The License Plate of the Picked Inventory.
Current Location:	The Current Location of the Picked Inventory.
Lot:	The Lot assigned to the Picked Inventory.
Vendor Lot:	The Vendor Lot assigned to the Picked Inventory.
Container:	The Container ID of the shipping container for the Picked Materials.

Billing

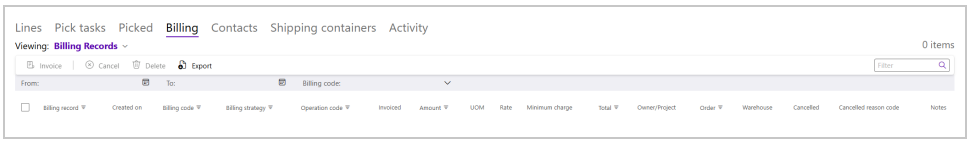
The **Billing** tab displays the Outbound Order's Accessorials and Billing Records, along with options to manage them. The Accessorials are listed by default, and Billing Records can be viewed by selecting that option from the dropdown.



Billing Information for Accessorials

Options for the **Accessorials** listed here include the ability to **Complete**, **Add**, **Delete**, and **Cancel** Accessorials, as well as the toggle to determine whether or not to **Auto Complete on Creation**.

Operation Code:	The Accessorial's Operation Code.
Expected Qty:	The Expected Quantity for the Accessorial.
Actual Qty:	The Actual Quantity for the Accessorial.
UOM:	The Base UOM for the Accessorial.
Notes:	Any Notes for the Accessorial.
Status:	The Status of the Order Line.
Billing Record:	The LookUp Code of the Billing Record for the Order.
Invoice:	The LookUp Code of the Billing Invoice for the Order.



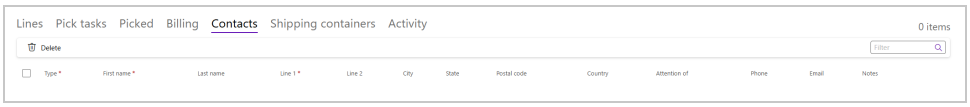
Billing Information for Billing Records

Options for the Billing Records listed here include the ability to **Create New** or **Add to Existing Invoice**, **Cancel**, **Delete**, **Export**, and **Filter** Billing Records by Date Range and/or Billing Code.

ID:	A system-generated field containing the system's unique ID for this particular Billing Record.
Created:	The date the Billing Record was created.
Billing Code:	The Billing Record's Billing Code.
Operation Code:	The Accessorial's Operation Code.
Billing Strategy:	The Billing Record's Billing Strategy.
Amount:	The Billing Record's Quantity.
UOM:	The Base UOM for the Billing Record.
Rate:	The Rate for the Billing Record.
Minimum Charge:	The Minimum Charge for the Billing Record.
Total:	The Total of the Billing Record.
Invoiced:	The Invoiced part of the Billing Record.
Owner:	The Owner for the Billing Record.
Project:	The Project for the Billing Record.
Material:	The Material for the Billing Record.
Packaging:	The Packaging UOM of the Material in the Billing Record.
Lot:	The Lot number for the Billing Record.
Order:	The Order number for the Billing Record.
Warehouse:	The Project for the Billing Record.
Location:	The Location of the Material in the Billing Record.
License Plate:	The License Plate of the Material in the Billing Record.
Work Order:	The Work Order number for the Billing Record.
Notes:	Any Notes for the Billing Record.
Cancelled:	An indication of whether or not the Billing Record has been cancelled.
Cancelled Reason Code:	For cancelled Billing Records, the Reason Code selected when the Billing Record was cancelled.

Contacts

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

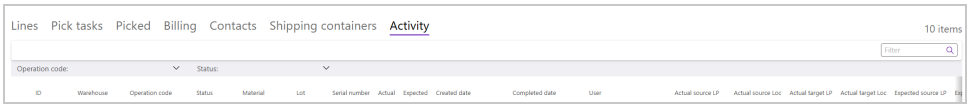


Contacts Information

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.
State:	The State of the Contact.
Postal Code:	The Postal Code of the Contact.
Country:	The Country of the Contact.
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.

Activity

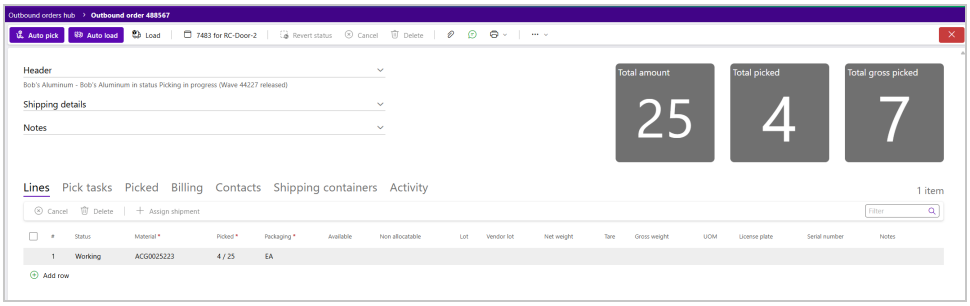
The **Activity** tab displays the Order's Activity in the Warehouse, including the Material, User, Completed Date and more.



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 Outbound Order took place.
Operation Code:	The Activity's Operation Code.
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 Base UOM for the Activity.
Expected:	The Expected Base UOM for the Activity.
Created Date:	The date the Activity was created.
Completed Date:	The date the Activity was completed.
User:	The logged in User who performed the Activity.
Actual Source LP:	The Actual Source License Plate in the Activity.
Actual Source Loc:	The Actual Source Location in the Activity.
Actual Target LP:	The Actual Target License Plate in the Activity.
Actual Target Loc:	The Actual Target Location in the Activity.
Expected Source LP:	The Expected Source License Plate in the Activity.
Expected Source Loc:	The Expected Source Location in the Activity.
Expected Target LP:	The Expected Target License Plate in the Activity.
Expected Target Loc:	The Expected Target Location in the Activity.
Notes:	Any Notes added to the Activity.



Outbound Process

The Outbound process consists of creating the Outbound Order, creating a Wave to get the Allocation and Picking processes under way, Packing and Loading the Inventory on

the truck to send it out into the world, and finally, completing the order so necessary Billing information can be processed.

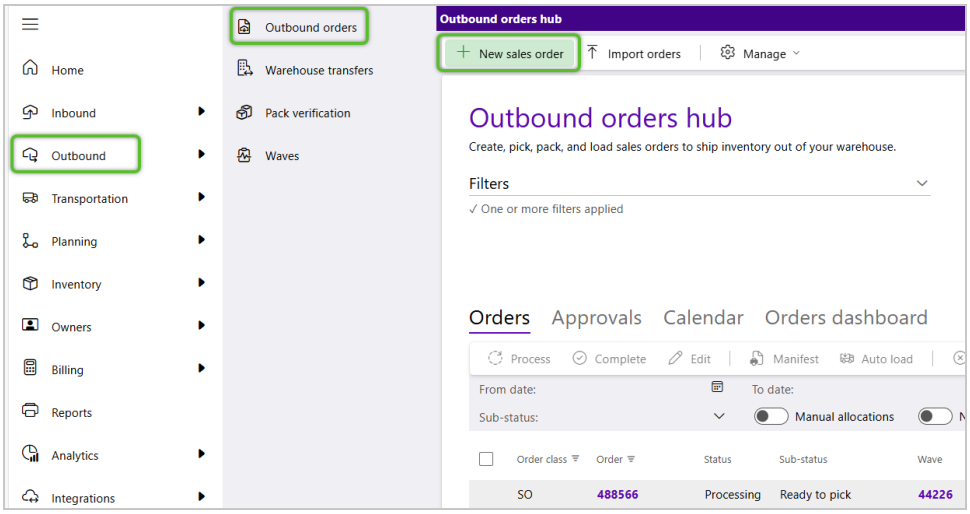
Step 1. Create an Outbound Order

The Outbound Order specifies which Materials are being sent out, their Owners, where they're being sent, how they're getting to their destination, and so on. In addition to being able to **Create an Outbound Order**, the Outbound Hub also allows you to **Import Outbound Orders**. You can also Copy an Order when you have it open for management.

Once created, the Outbound Order information can be managed from the Outbound Hub.

Related Tutorials

- How to Create an Outbound Order
- How to Import Outbound Orders
- How to Create an Outbound Load Container
- How to Process an Outbound Order

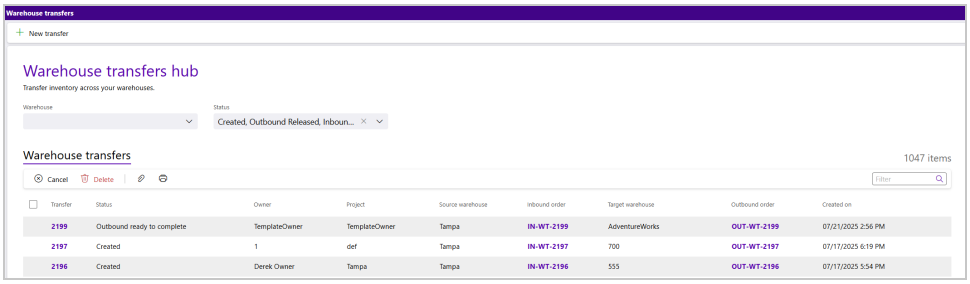


Warehouse Transfers

Warehouse Transfers move Inventory from one Warehouse in Footprint to another, requiring an Outbound Order. The Location of the Inventory will change to the new Warehouse's Location, while remaining under the same Owner and Project. The process begins with creating the Warehouse Transfer Order from the Outbound Warehouse and ends with completing the Warehouse Transfer Order from the Inbound Warehouse.

Related Tutorials

- How to Create and Release a Warehouse Transfer
- How to Auto Pick a Warehouse Transfer
- How to Complete an Outbound Warehouse Transfer
- How to Release an Inbound Warehouse Transfer
- How to Auto Receive an Inbound Warehouse Transfer
- How to Complete an Inbound Warehouse Transfer

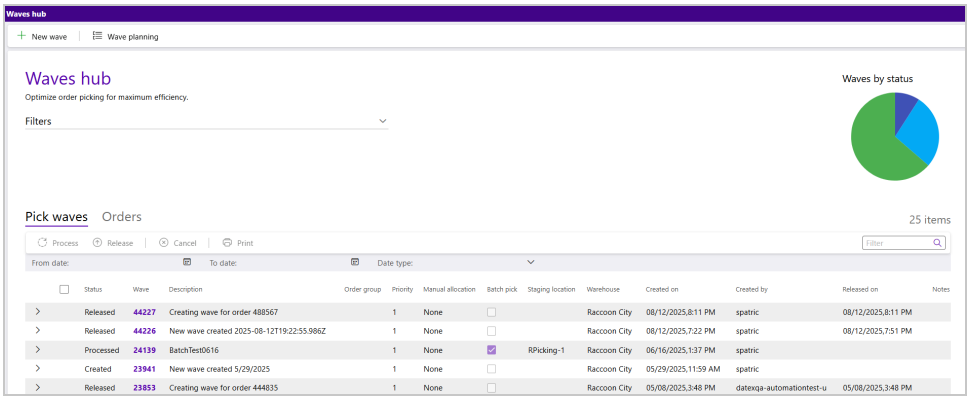


Step 2. Create a Wave

Waves are created from processed Outbound Orders and allow Allocation of the inventory (locating where it will be pulled from inside the Warehouse), readying Picking so workers can actually begin physically moving the inventory to the Loading Dock.

The Waves Hub displays basic Wave Details and provides options to **Create**, **Edit**, **Process**, **Release**, and **Cancel** a Wave. Each Wave in the Waves Hub contains the Inbound Pick Tasks for the Wave, with options to **Auto Pick**, **Auto Load**, **Manifest**, **Reallocate**, **Group by LPs**, and more.

Several different Orders can be combined into one Wave, so the process only needs to take place once, or you can create Waves for separate Orders. Either way, each Wave created will need to be processed, then released, so that the Material will be Allocated and the inventory can begin its journey.



Step 3. Pick an Outbound Order

With the Order and Wave creation behind us, we've finished the hard part. Now we're ready to begin the actual move process, starting with Picking the Materials. Picking entails going to the Location the system (or you) selected, confirming the Materials are present in the Quantity asked for, and sending the Materials to their new License Plate and Location. This should be accompanied by physically relocating the Materials in the Warehouse.

Related Tutorials

Picking can be done from either from a desktop or a mobile device.

- How to Auto Pick Inventory
- How to Unpick Inventory



Step 4. (Optional) Pack an Outbound Order

Packing takes the Shipping Materials or License Plates from the License Plate or Container they are currently assigned to, and repackages them into a new or existing License Plate or Container for Shipment. There may be no need to Pack if you are able to ship the License Plates or Containers the Materials are already stored on, or if you created new License Plates or Containers for the Shipment during the Picking process.

Packing can be completed using a mobile device.

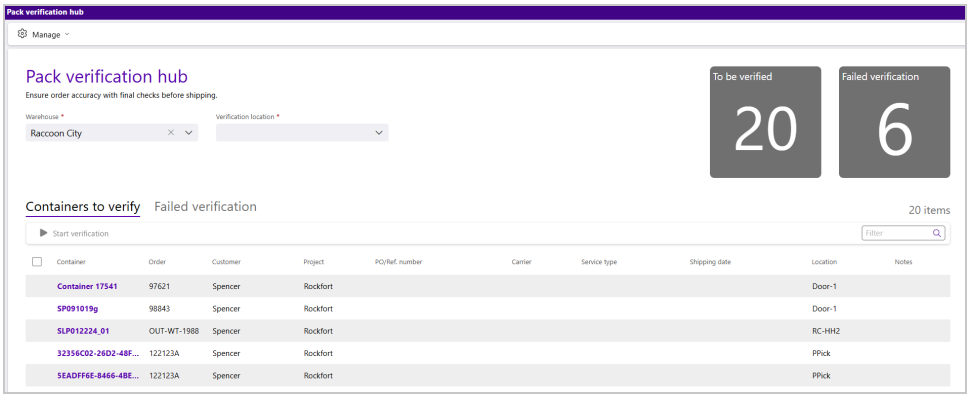
Pack Verification

Pack Verification allows users to verify the contents of a shipping container, review relevant instructions, set the container type and dimensions, print manifest, labels, attachments, and/or reports, and add accessorial charges. Steps for Pack Verification vary based on the needs of your organization.

Initial Pack Verification is done blind, meaning the user will not see the details to be verified. When Pack Verification fails, the details to be verified will be revealed to users for reverification and management.

Related Tutorials

- How to Complete Pack Verification
- How to Fail a Verification



Step 5. Load an Outbound Order

Loading is the last step in the Outbound process, where an Order's License Plates, and the Materials on them, are Loaded onto the truck, moving that Inventory out of the Warehouse.

Related Tutorials

Loading can be performed from either from a desktop or a mobile device.

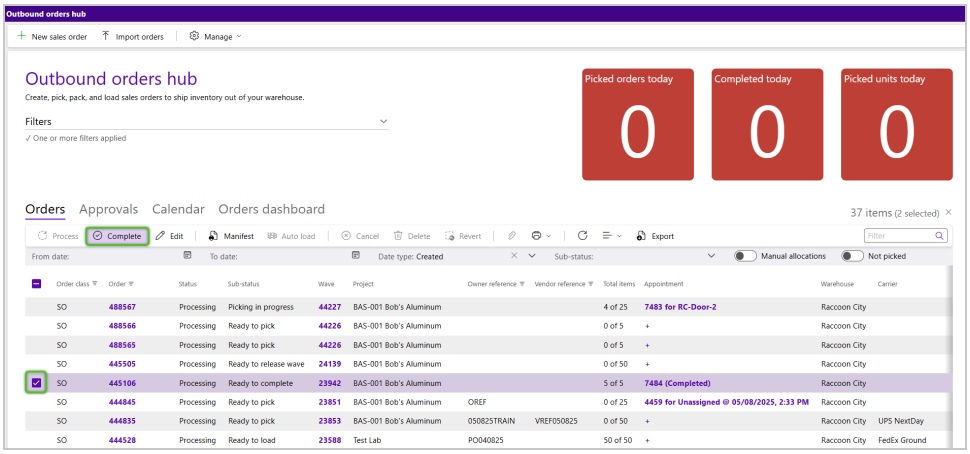
- How to Auto Load Inventory

Step 6. Complete an Outbound Order

And, finally, by completing the Outbound Order, we are able to close out the Order and send the necessary information to any related Billing that is set up. It is here where we review and verify what has taken place for each shipment in the order, and put an end to the Outbound process.

Related Tutorials

- How to Complete an Outbound Order
- How to Perform a Driver Check Out



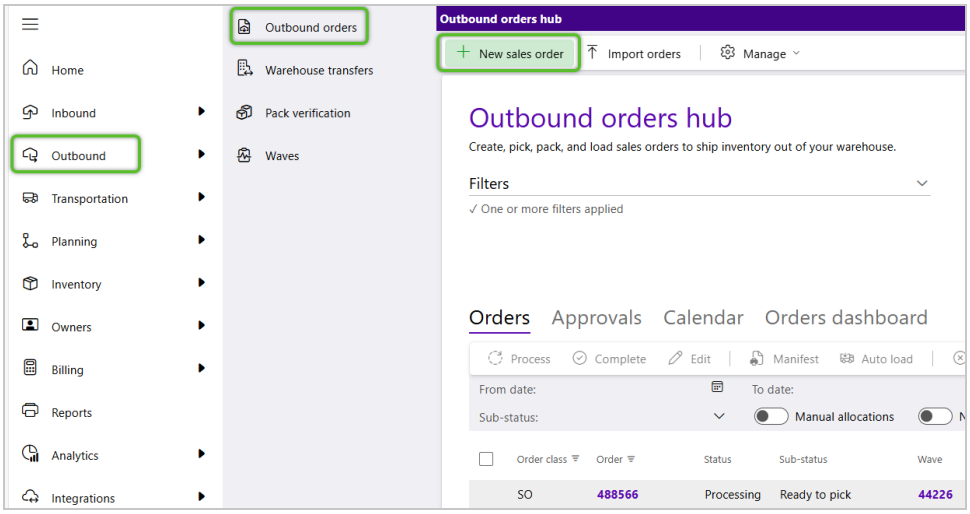
Create an Outbound Order

Outbound Orders identify the specific inventory to be moved out of the warehouse. All Outbound Order Class Types share the same goal: to identify inventory to be shipped or moved out of the warehouse. Once created, the Order can be managed from the Outbound Hub. Outbound Orders can also be imported or copied.

1. From the **Outbound Hub**, click the option to **+ Create Sales Order**.

Tip

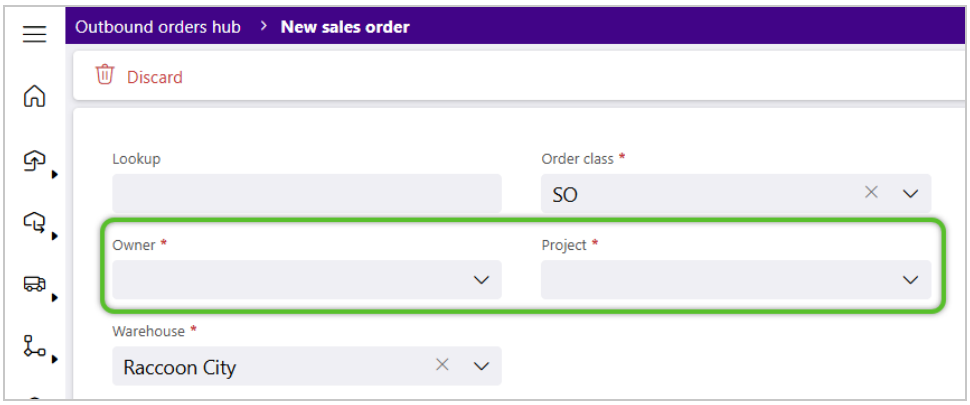
Values already selected in the Outbound Hub Filters, such as Owner, Project, or Warehouse will auto-populate. Otherwise, the Warehouse field populates based on the user's Default Warehouse.



The **Lookup** will populate an Order number upon creation, unless otherwise specified, and the **Order Class** defaults to SO.

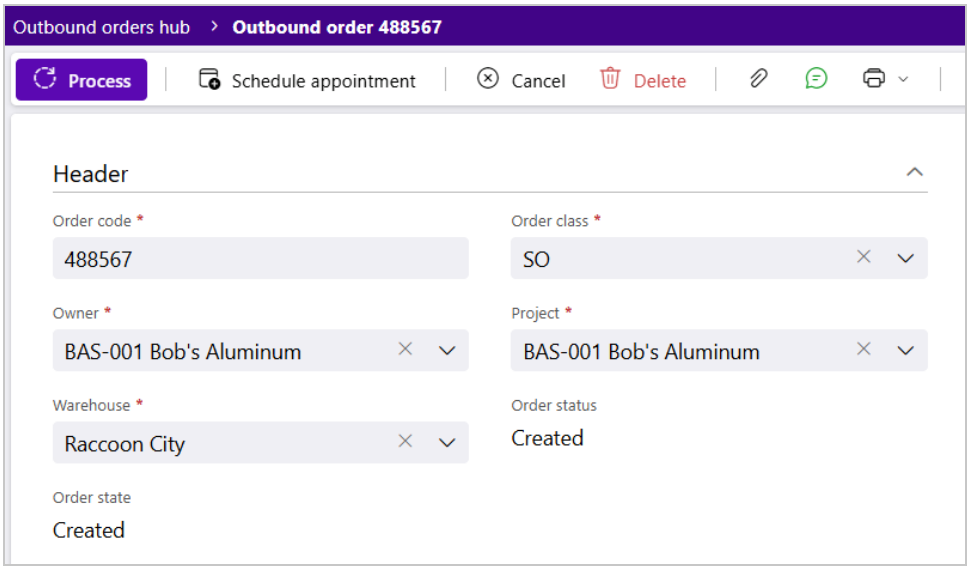
2. Select the required **Owner** of the Materials that will be leaving.

3. Select the required **Project** for the Materials and tab out of the field to create the new Outbound Order.

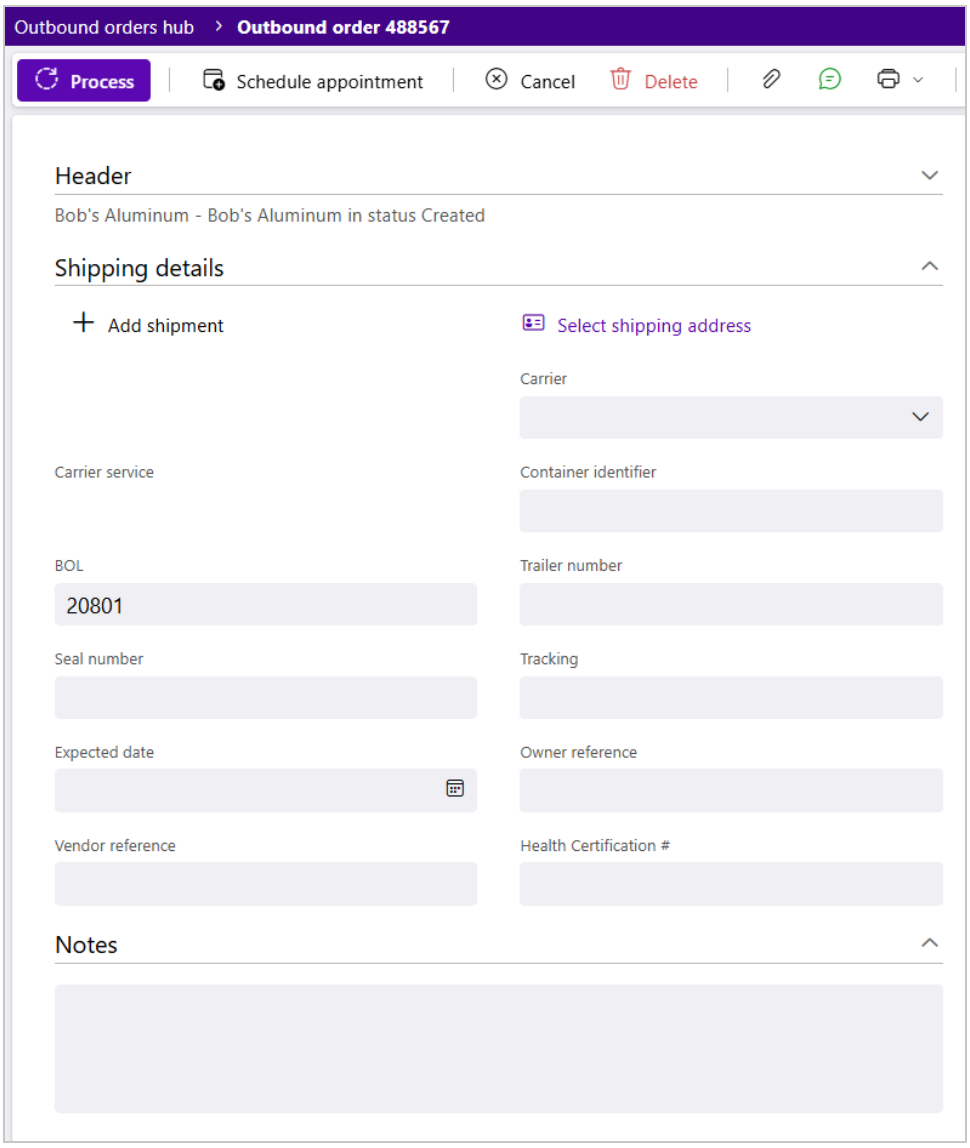


4. To enter optional information about the vendor to whom you are sending the order, click to open the **Details** dropdown.

Outbound Order Details



Order: The ID number for the Order.
Order Class: The Order Class the Order has been assigned to.
Owner: The Name of the Owner for whom the Order was created.
Project: The Name of the Project associated with the Order.
Warehouse: The Warehouse where the Order was Created.
Order Status: The current Status of the Order.
Order State: The current State of the Order.


Outbound orders hub
Outbound order 488567
Process
Schedule appointment
Cancel
Delete
Header
Bob's Aluminum - Bob's Aluminum in status Created
Shipping details
Add shipment
Select shipping address
Carrier
Carrier service
Container identifier
BOL
20801
Trailer number
Seal number
Tracking
Expected date
Owner reference
Vendor reference
Health Certification #
Notes

Ship To:	The Ship To Address for the Outbound Order.
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.
Service:	The Service specified for the Order.
Owner Reference:	The Reference Number given to the Order for the Owner's Reference.
Container Identifier:	The Container ID specified for the Order.
BOL:	The Bill of Lading for the Order.
Trailer Number:	The Trailer Number for the Order.
Seal Number:	The Seal Number for the Order.
Tracking:	The Tracking ID specified for the Order.
Pickup Date:	The Pickup date and time specified for the Order.
Custom Fields:	Specific to your organization.
Notes:	Any Notes for the Order.

5. Click the **+ Add Row** option at the bottom of the **Lines** tab to begin specifying the Inventory to Pick.

Specific Lots, License Plates, or Serials can be added using the **+ Add Lines by Inventory** option.

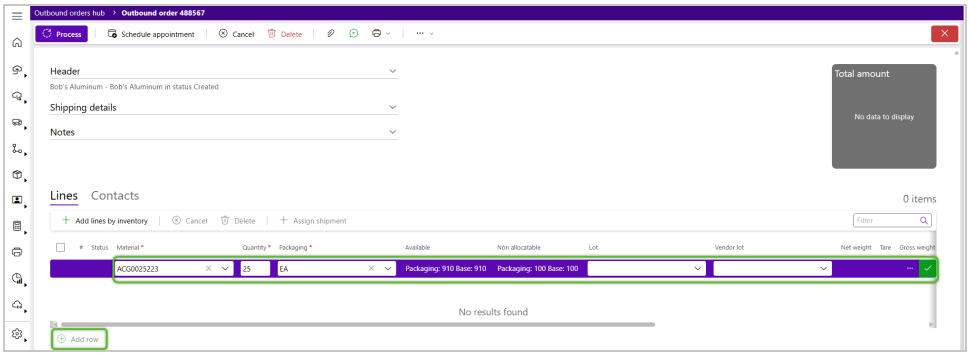
6. Select a **Material** from the list available to the Project.

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

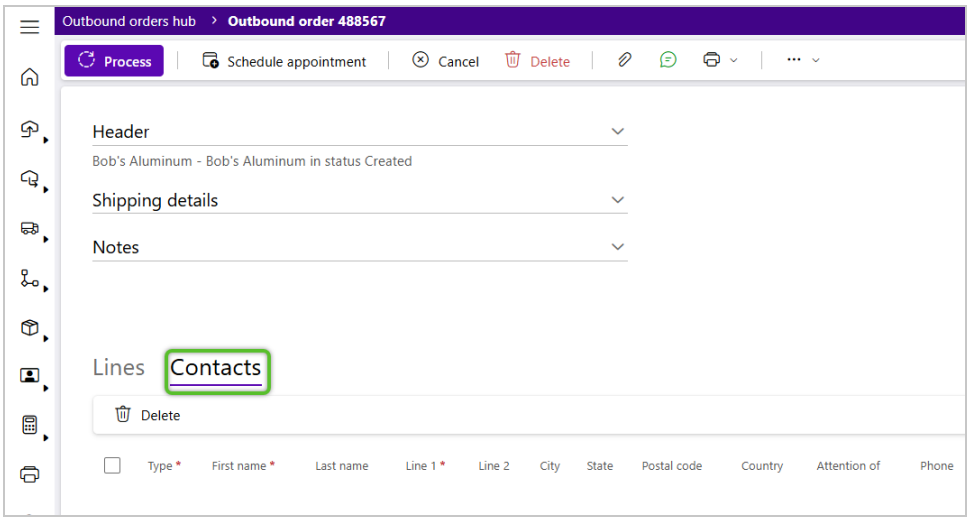
> **Note**
>
> If a Lot is not selected for a Line, the default is the Material 's Allocation Strategy.

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

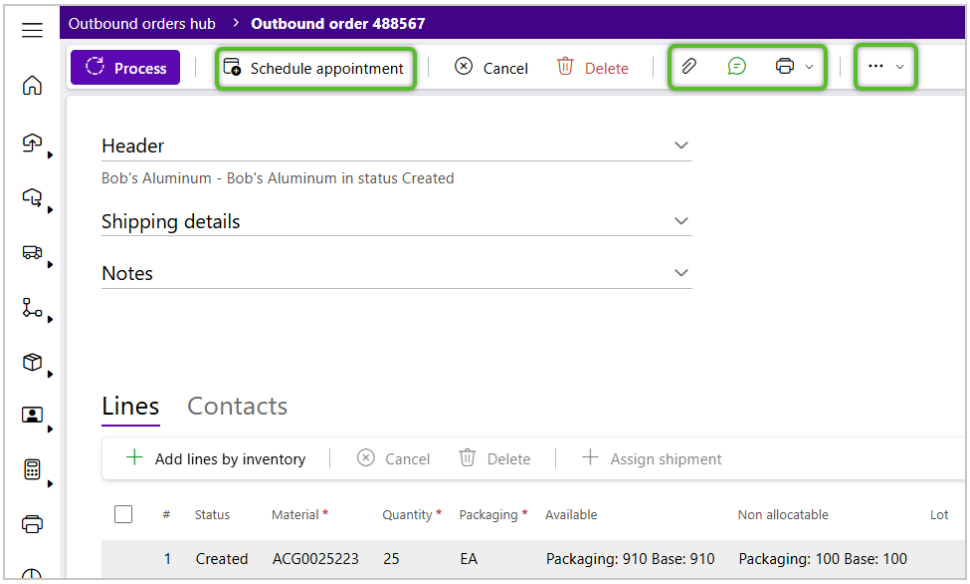
Repeat steps 5-8 to add more order Lines.



9. Click the **Contacts** tab to add contacts.



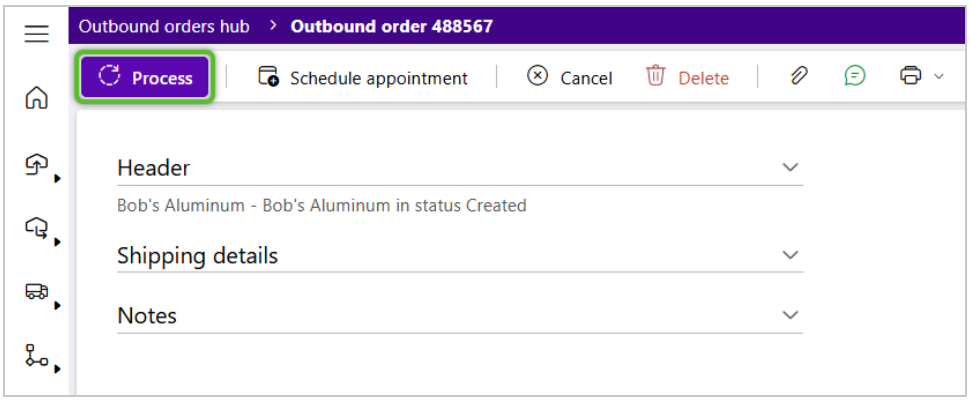
10. Use the Order Toolbar options to **Add a Dock Appointment**, **Add Attachments**, **Add Comments**, **Copy the Order**, and so on.



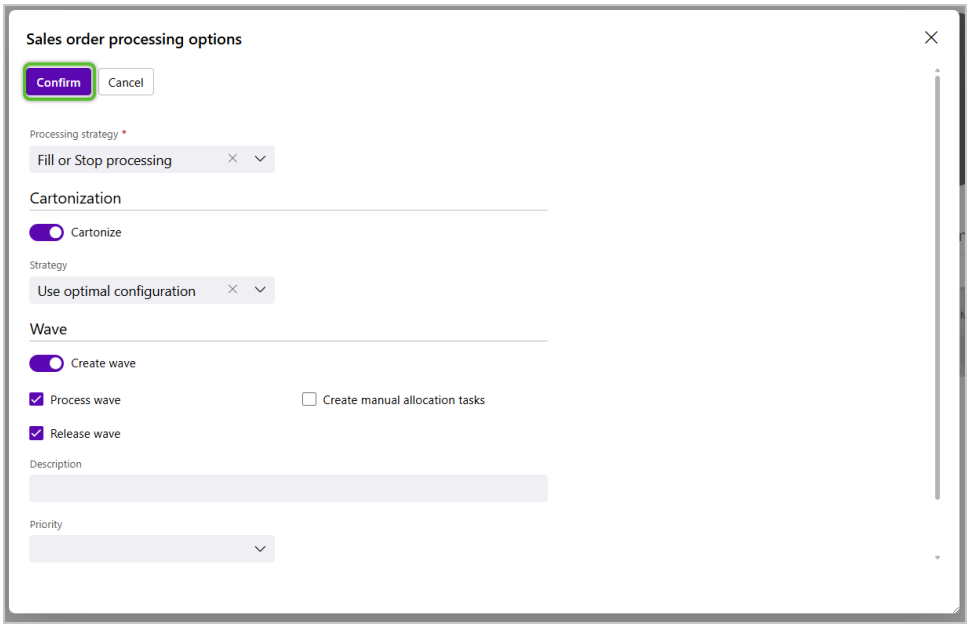
11. Finally, when Picking for the order may begin, click the **Process** option in the Order Toolbar.

Note

To Process and Outbound Order, a Default Picking Location must be set.



12. Set the details in the **Order Processing Options** window, then click the **Confirm** button.



Now that you've created and processed the new Outbound Order, **Picking** can begin and the order can be managed as needed from the Outbound Hub.

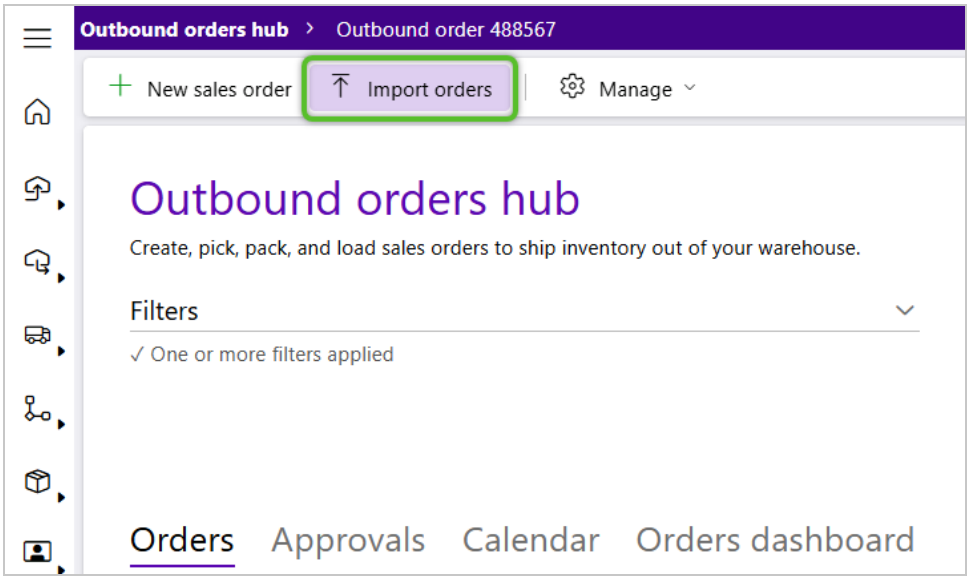
Import Outbound Orders

Imported Outbound Orders will appear alongside other outbound orders in Footprint for review and management purposes.

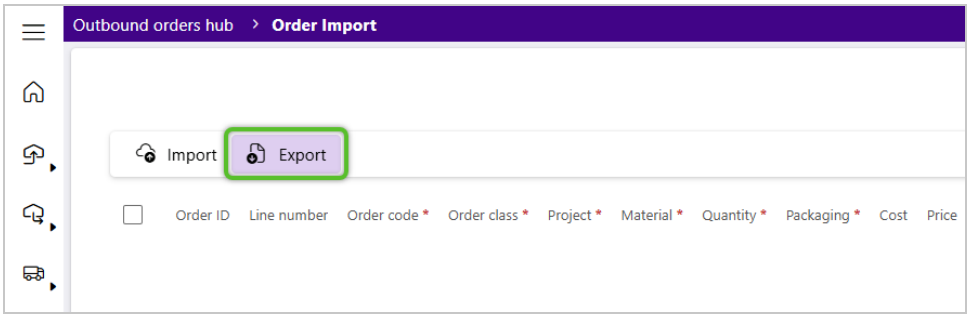
Please Note

- For the most comprehensive import, we recommend downloading the latest export 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.

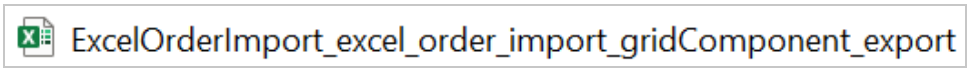
1. From the **Outbound Hub**, click the option to **Import Orders**.



2. Click the **Export** option at the top of the **Inbound Order Import** page to download the template.



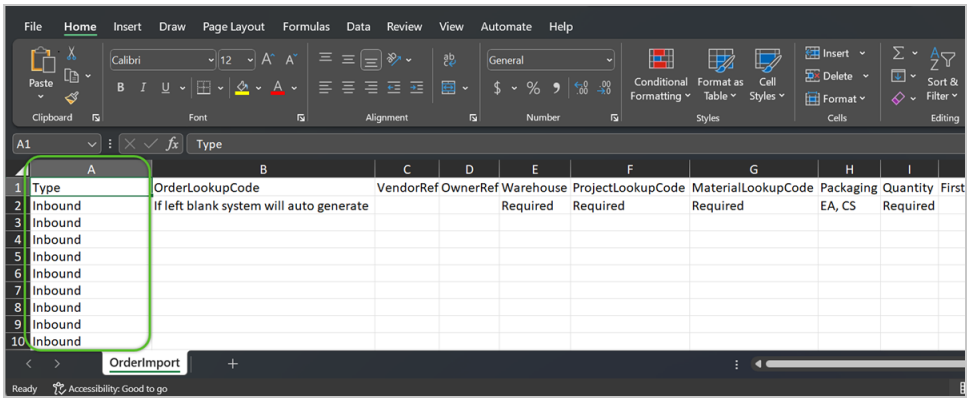
3. Locate the file named '**ExcelOrderImport_excel_order_import_gridComponent_export**' and double click on it to open it.



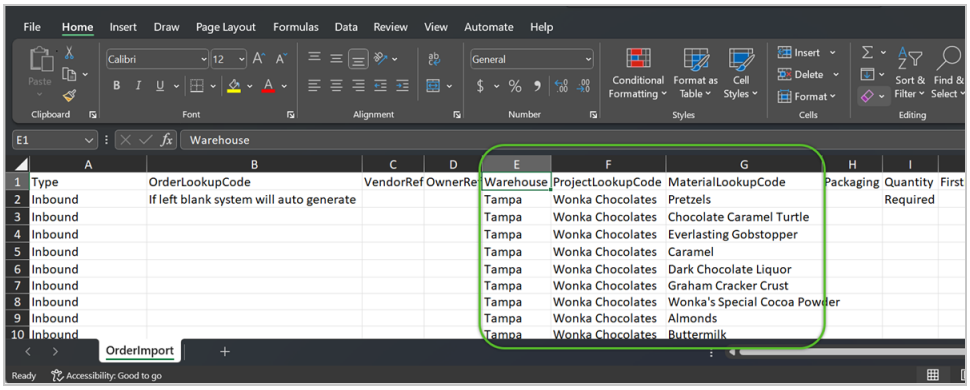
Important

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. In required column A, indicate that the order is **Outbound**.



5. In required columns E, F, and G, indicate the **Warehouse**, **ProjectLookupCode**, and **MaterialLookupCode**(s).

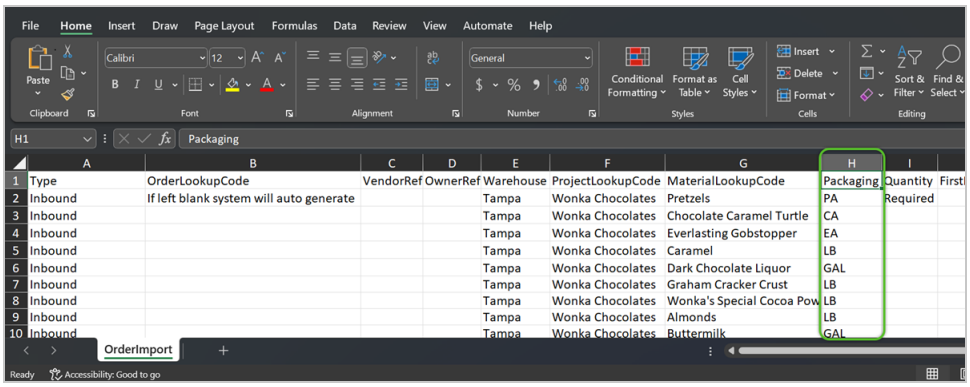


	A	B	C	D	E	F	G	H	I
1	Type	OrderLookupCode	VendorRef	OwnerRef	Warehouse	ProjectLookupCode	MaterialLookupCode	Packaging	Quantity
2	Inbound	If left blank system will auto generate			Tampa	Wonka Chocolates	Pretzels		Required
3	Inbound				Tampa	Wonka Chocolates	Chocolate Caramel Turtle		
4	Inbound				Tampa	Wonka Chocolates	Everlasting Gobstopper		
5	Inbound				Tampa	Wonka Chocolates	Caramel		
6	Inbound				Tampa	Wonka Chocolates	Dark Chocolate Liquor		
7	Inbound				Tampa	Wonka Chocolates	Graham Cracker Crust		
8	Inbound				Tampa	Wonka Chocolates	Wonka's Special Cocoa Powder		
9	Inbound				Tampa	Wonka Chocolates	Almonds		
10	Inbound				Tampa	Wonka Chocolates	Buttermilk		

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** fields in Footprintor an error will occur when importing.

6. In required column H, select the specific type of **Packaging** for each material.

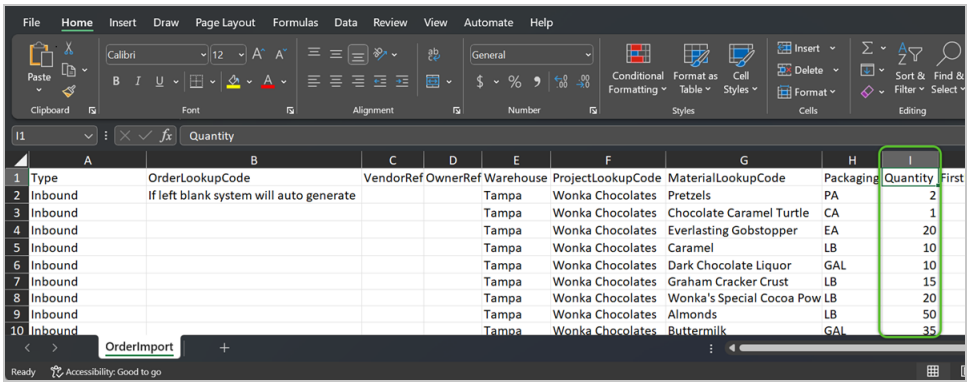


	A	B	C	D	E	F	G	H	I
1	Type	OrderLookupCode	VendorRef	OwnerRef	Warehouse	ProjectLookupCode	MaterialLookupCode	Packaging	Quantity
2	Inbound	If left blank system will auto generate			Tampa	Wonka Chocolates	Pretzels	PA	Required
3	Inbound				Tampa	Wonka Chocolates	Chocolate Caramel Turtle	CA	
4	Inbound				Tampa	Wonka Chocolates	Everlasting Gobstopper	EA	
5	Inbound				Tampa	Wonka Chocolates	Caramel	LB	
6	Inbound				Tampa	Wonka Chocolates	Dark Chocolate Liquor	GAL	
7	Inbound				Tampa	Wonka Chocolates	Graham Cracker Crust	LB	
8	Inbound				Tampa	Wonka Chocolates	Wonka's Special Cocoa Pow	LB	
9	Inbound				Tampa	Wonka Chocolates	Almonds	LB	
10	Inbound				Tampa	Wonka Chocolates	Buttermilk	GAL	

Important

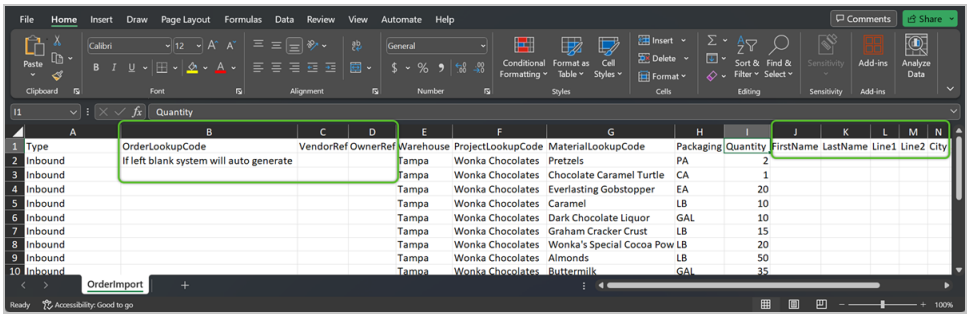
To avoid errors when importing, the **Packaging** data added in column H of the import file must be an available packaging type in Footprint for the material (**MaterialLookupCode**) listed in column G.

7. In required column I, enter the **Quantity** of each material listed.



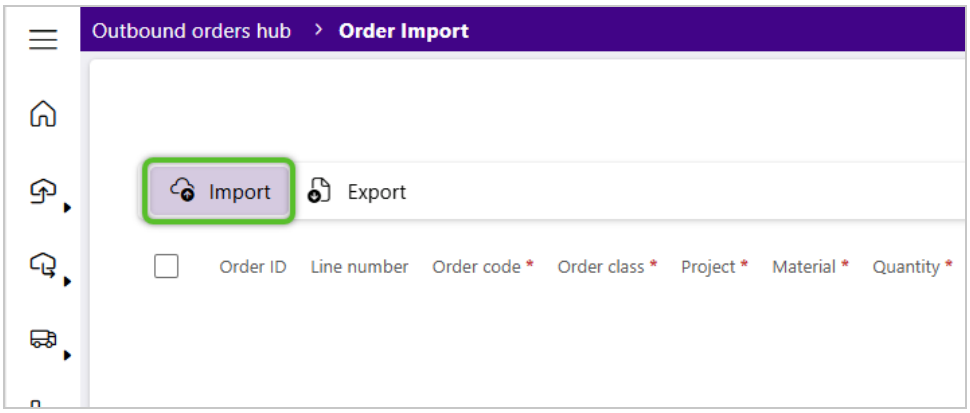
	A	B	C	D	E	F	G	H	I	
1	Type	OrderLookupCode	VendorRef	OwnerRef	Warehouse	ProjectLookupCode	MaterialLookupCode	Packaging	Quantity	First
2	Inbound	If left blank system will auto generate			Tampa	Wonka Chocolates	Pretzels	PA	2	
3	Inbound				Tampa	Wonka Chocolates	Chocolate Caramel Turtle	CA	1	
4	Inbound				Tampa	Wonka Chocolates	Everlasting Gobstopper	EA	20	
5	Inbound				Tampa	Wonka Chocolates	Caramel	LB	10	
6	Inbound				Tampa	Wonka Chocolates	Dark Chocolate Liquor	GAL	10	
7	Inbound				Tampa	Wonka Chocolates	Graham Cracker Crust	LB	15	
8	Inbound				Tampa	Wonka Chocolates	Wonka's Special Cocoa Pow	LB	20	
9	Inbound				Tampa	Wonka Chocolates	Almonds	LB	50	
10	Inbound				Tampa	Wonka Chocolates	Buttermilk	GAL	35	

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



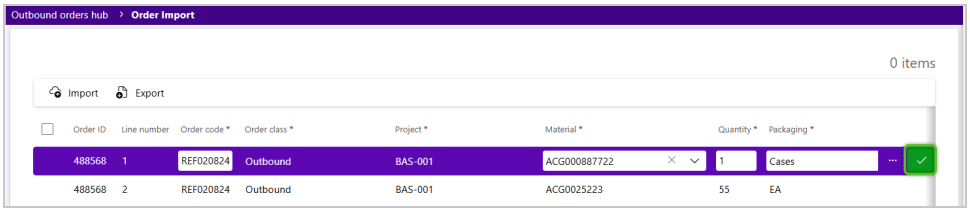
	A	B	C	D	E	F	G	H	I	J	K	L	M	N
1	Type	OrderLookupCode	VendorRef	OwnerRef	Warehouse	ProjectLookupCode	MaterialLookupCode	Packaging	Quantity	FirstName	LastName	Line1	Line2	City
2	Inbound	If left blank system will auto generate			Tampa	Wonka Chocolates	Pretzels	PA	2					
3	Inbound				Tampa	Wonka Chocolates	Chocolate Caramel Turtle	CA	1					
4	Inbound				Tampa	Wonka Chocolates	Everlasting Gobstopper	EA	20					
5	Inbound				Tampa	Wonka Chocolates	Caramel	LB	10					
6	Inbound				Tampa	Wonka Chocolates	Dark Chocolate Liquor	GAL	10					
7	Inbound				Tampa	Wonka Chocolates	Graham Cracker Crust	LB	15					
8	Inbound				Tampa	Wonka Chocolates	Wonka's Special Cocoa Pow	LB	20					
9	Inbound				Tampa	Wonka Chocolates	Almonds	LB	50					
10	Inbound				Tampa	Wonka Chocolates	Buttermilk	GAL	35					

9. Save and close the spreadsheet, then click **Import** in the toolbar to select the file for upload.

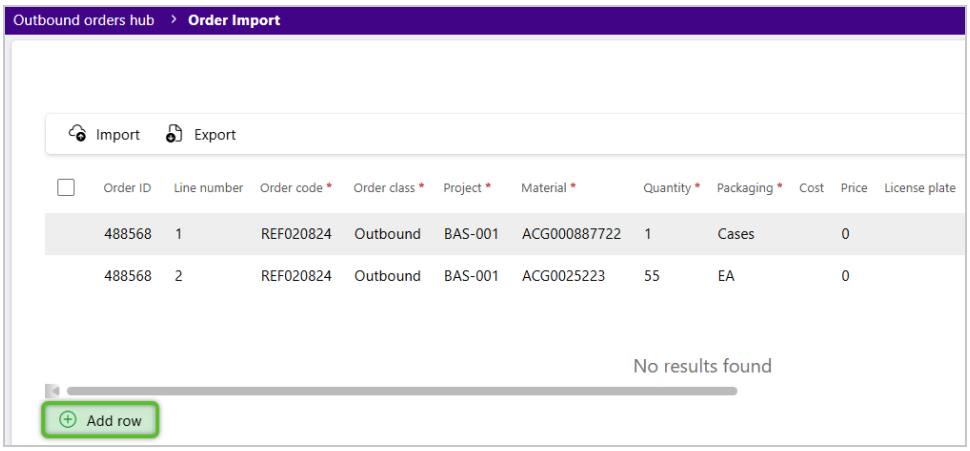


The order details will display for review and edits.

Click into a row to make changes to an order, then click the 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 outbound orders will display alongside other orders in the Outbound Hub.

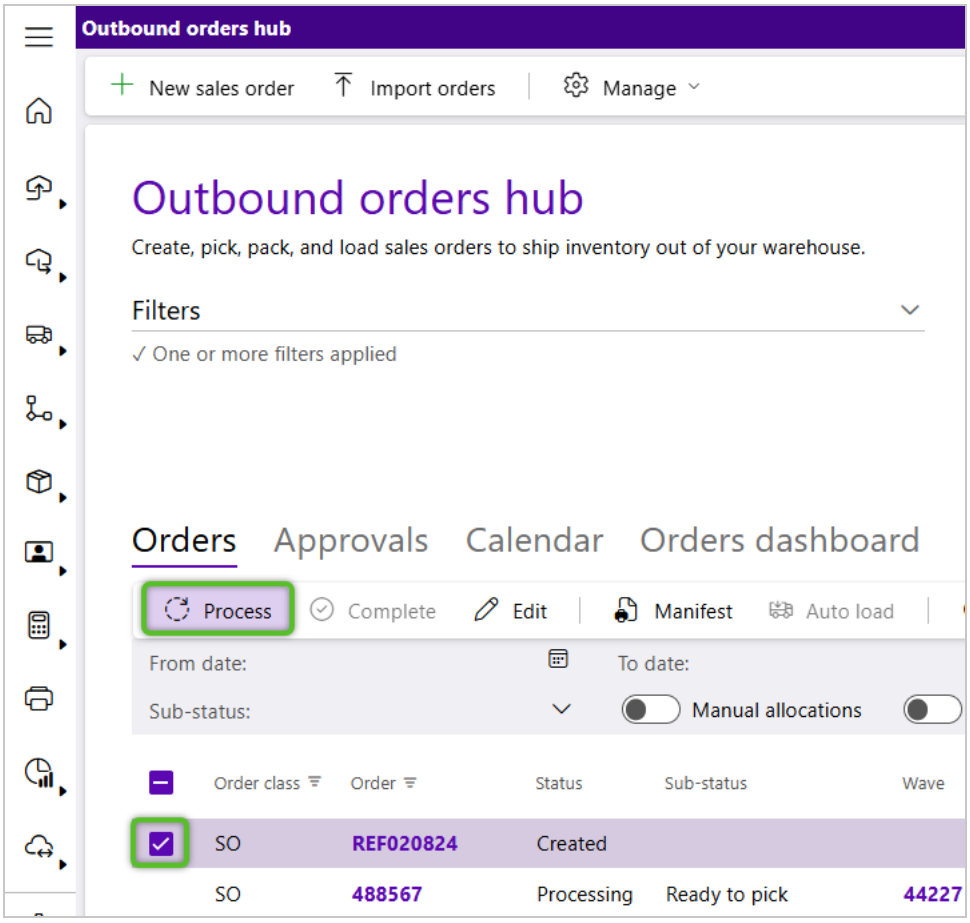
Process an Outbound Order

Processing an Outbound Order creates and releases the **Wave** that will allocate Inventory to be Picked. Outbound Orders can be Processed from the Outbound Hub, as well as from the Outbound Order itself.

Note

Only those Outbound Orders with **Created** status can be Processed.

1. From the **Outbound Hub**, locate the Order to be Processed, check the box to the left of it, then click **Process** in the **Orders** tab toolbar.



2. In the Processing Options window, the required **Processing Strategy** and **Cartonization Strategy** are populated by default, and can be updated as needed.

3. Click the **Create Wave** toggle when needed to open more Wave options.

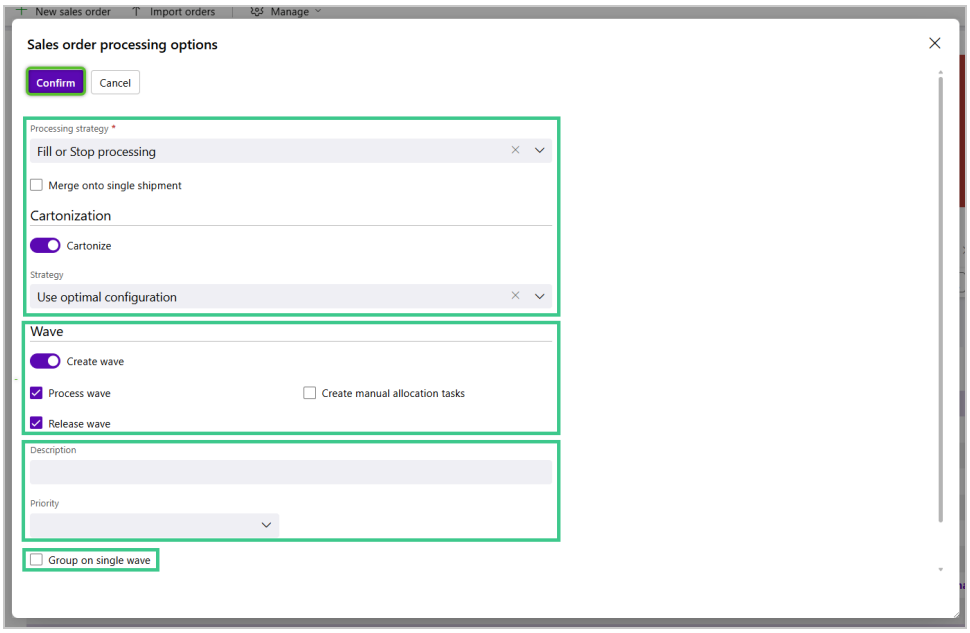
4. The **Process Wave** and **Release Wave** check boxes are selected by default and can be updated as needed.

5. If needed, click the **Create Manual Allocation Tasks** check box.

6. Enter an optional Wave **Description** and select an optional **Priority**.

7. When multiple orders are selected, the check box to **Group on Single Wave** will be available.

8. Click the **Confirm** button to begin processing the Outbound Order.



9. Click the **OK** button to close the **All Order(s) Processed** confirmation window.

When processing has completed, the Outbound Order status updates to **Ready to Pick** and the Wave is **Released**.

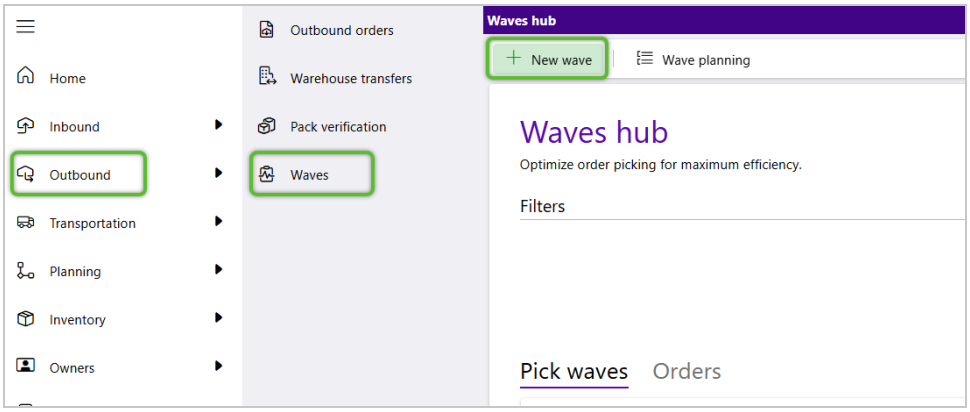
Create a Wave

Waves allocate the Inventory for one or multiple Shipments, assign the Pick Location, and enable Picking once Released.

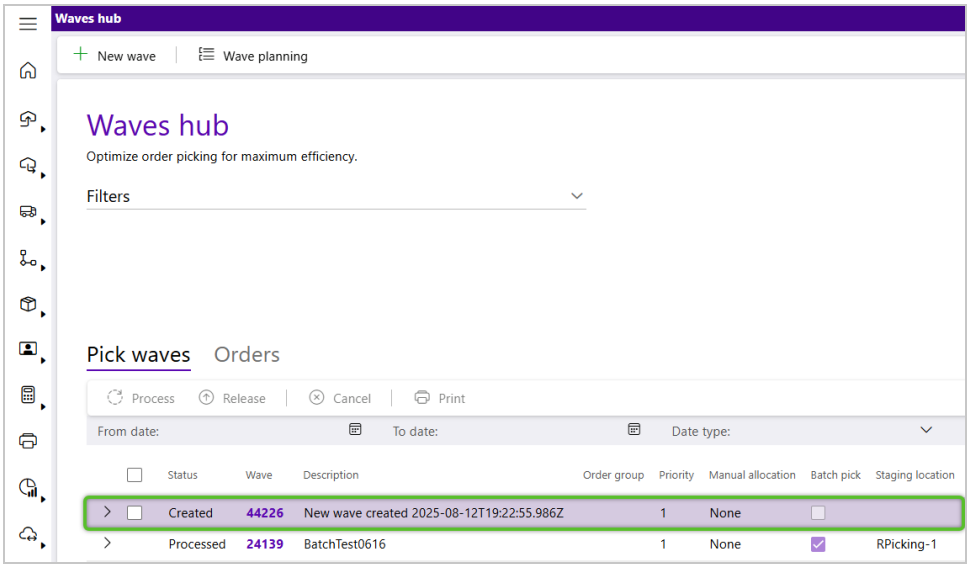
1. Click **Outbound** in the left navigation menu, then click **Waves**.

The **Waves Hub** will display.

2. Click **+ New Wave** in the top Waves Hub toolbar.

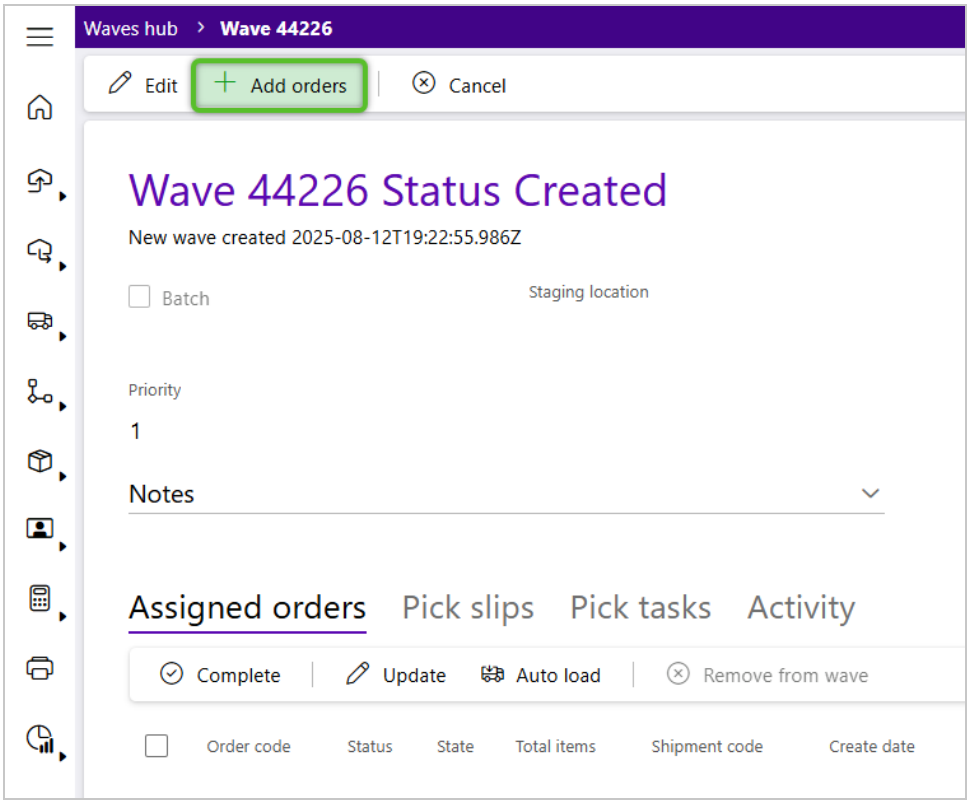


3. The new wave will populate in the first row of the Pick Waves

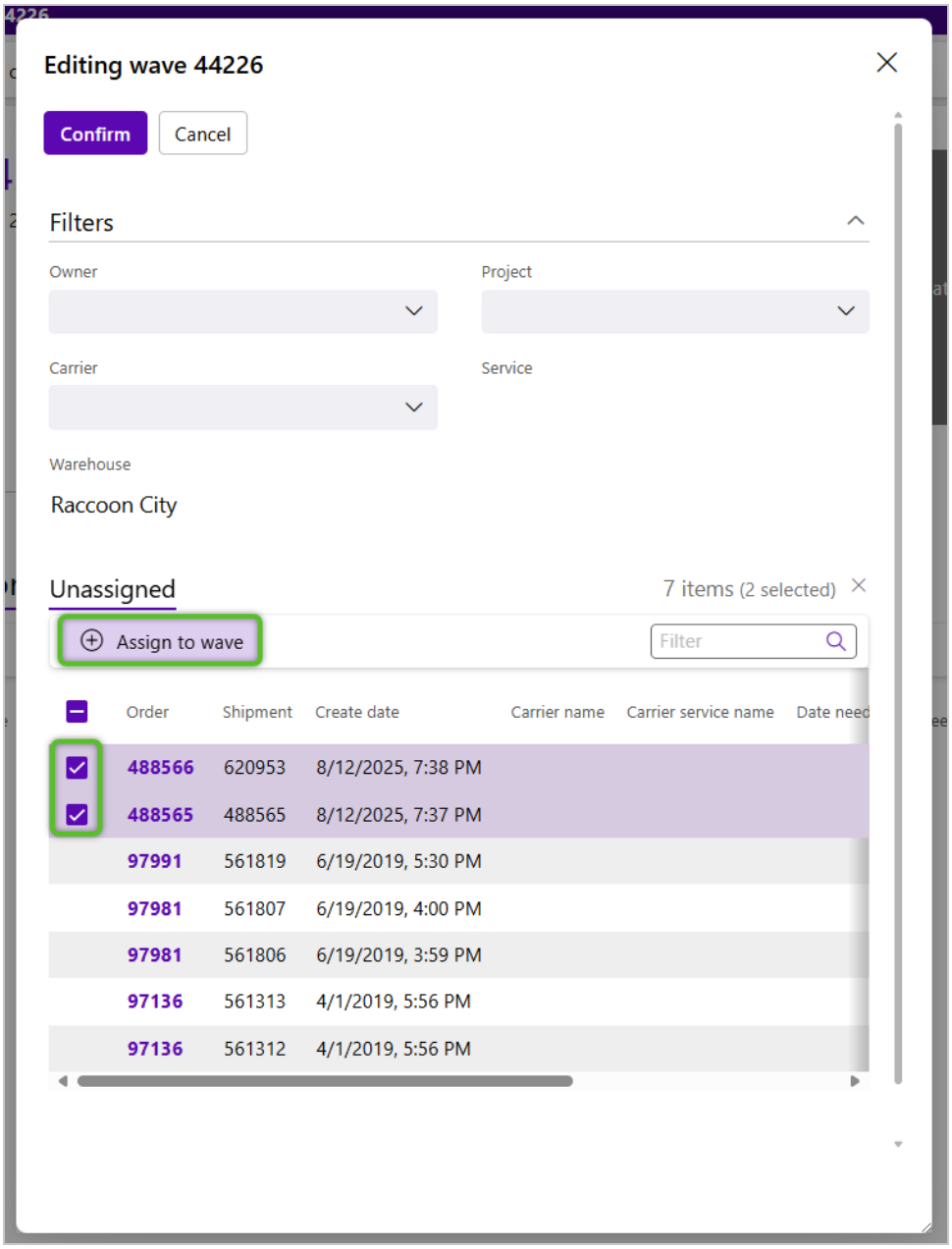


4. Click the **Wave** hyperlink to open the new Wave.

5. Click the **+ Add order** button to open the **Editing wave** window.

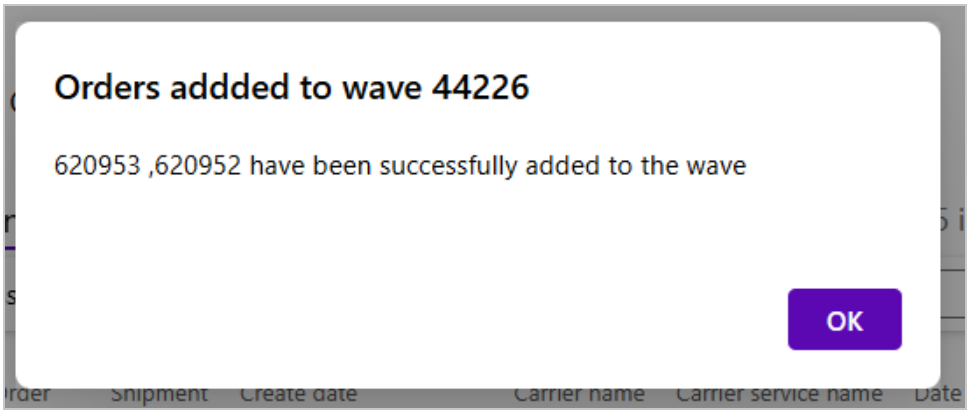


6. Check all Shipments to be included in the wave, then click **+ Assign to wave**.



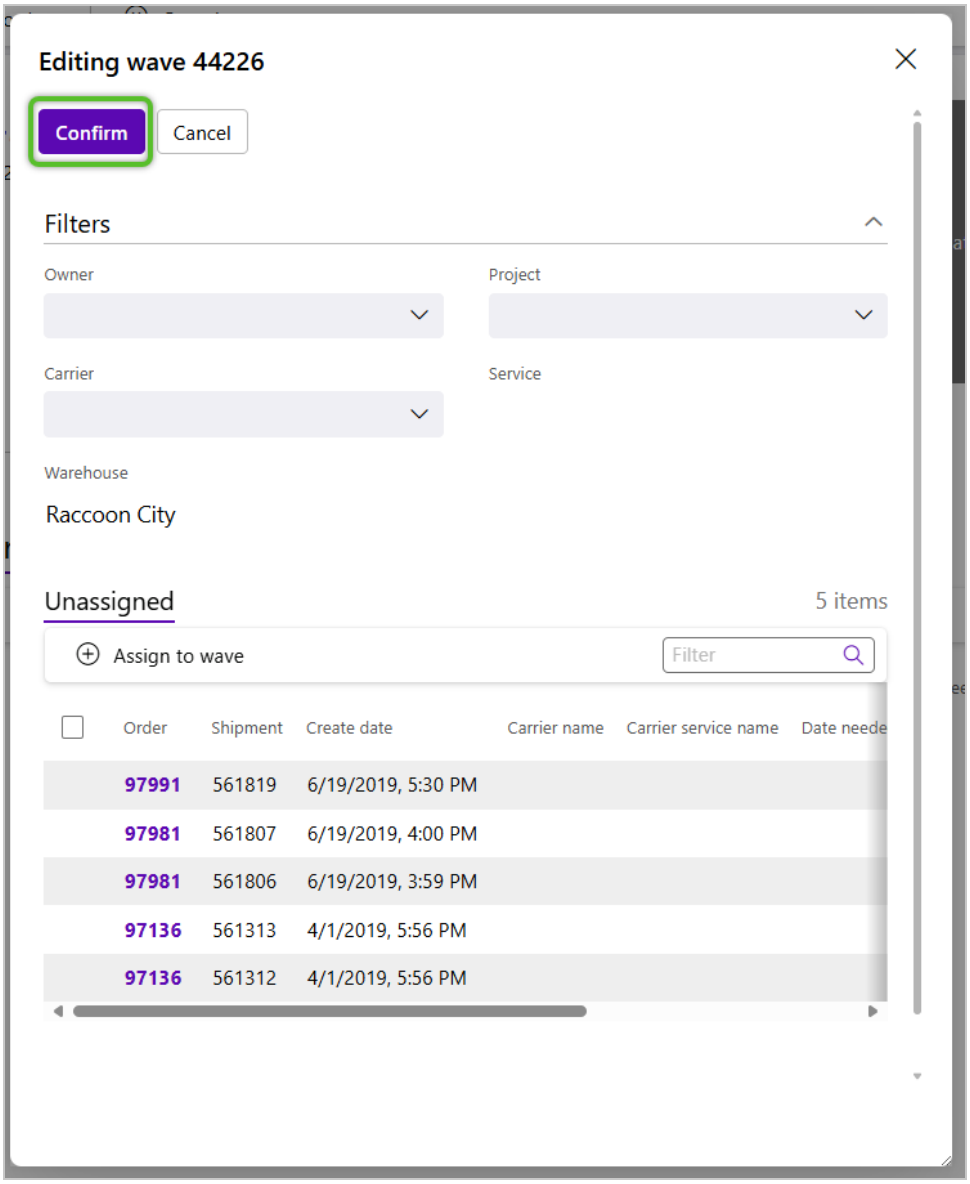
7. Click to **OK** to close the confirmation window.

Added shipments will be removed from the **Unassigned** tab. Continue to add shipments as needed.



6. Once all shipments have been added. Click the **Confirm** button at the top of the window.

Editing wave window will close and all added shipments will be listed under the **Assigned orders** tab of the wave.



Process a Wave

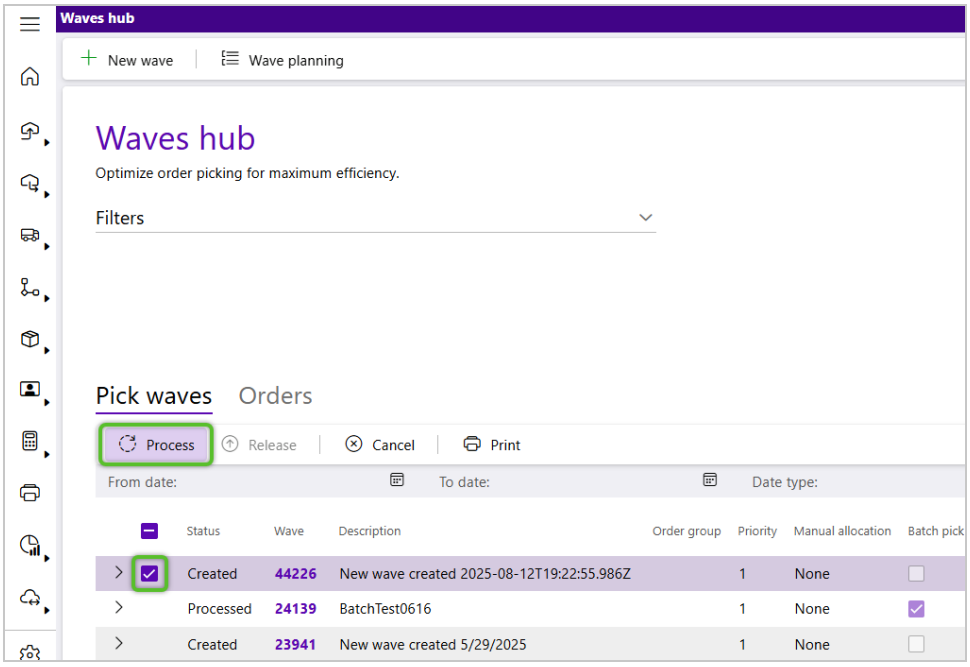
Processing a Wave allocates inventory to be picked. Waves can be created and processed from the Waves Hub, as well as an Outbound Order.

1. Click **Outbound** in the left navigation menu, then click **Waves**.

> **Note**
>
> Waves can only be Processed when they have the **Created** status.

2. Select the Wave(s) to be processed, then click **Process** in the **Pick Waves** tab toolbar.

When processing has completed, the Wave status will update to **Processing/Processed**.

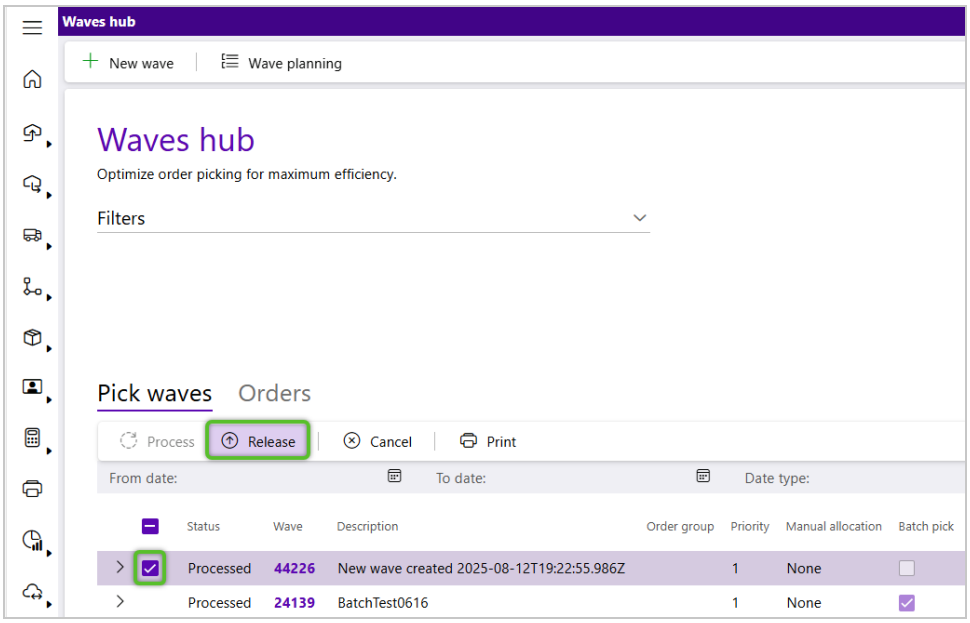


Release a Wave

Once Inventory has been allocated to a Wave, the Wave can be **Released** to the floor and picking can begin. Waves can be released from the Waves Hub, as well as an Outbound Order.

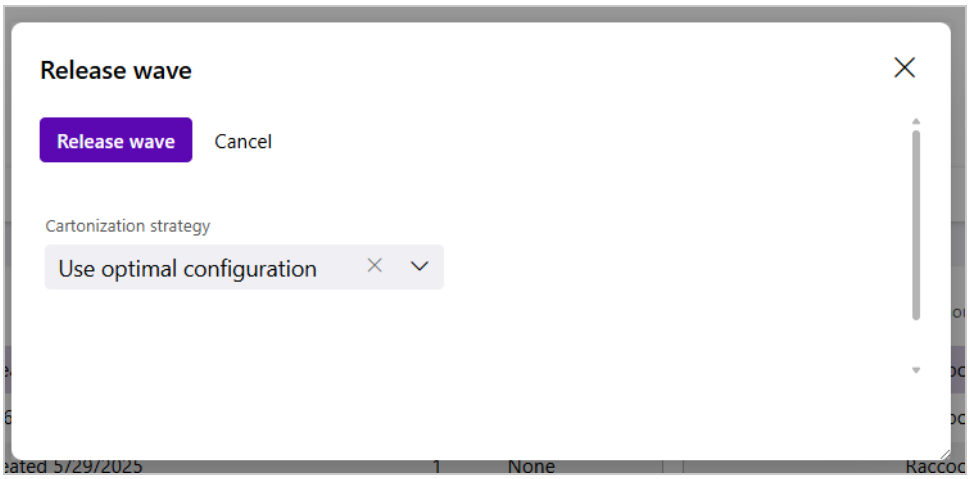
1. Click **Outbound** in the left navigation menu, then click **Waves**.

2. Select the Wave(s) to be released, then click **Release** in the **Pick Waves** tab toolbar.



3. Select a **Cartonization strategy** if applicable, then click **Release wave**.

The Wave status will update to **Released**.



Auto-Pick Inventory

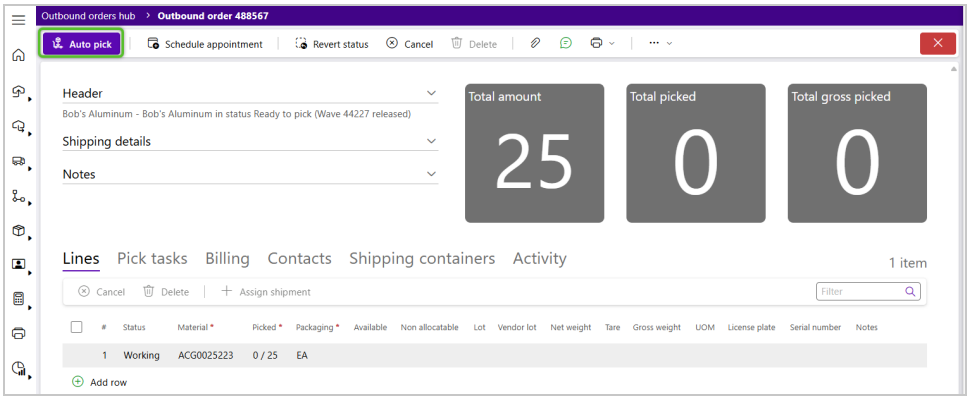
Outbound Orders can be **Auto-Picked** from the Outbound Hub, as well as from the Outbound Order itself.

Note

Only those Outbound Orders with **Ready to Pick** status can be Auto Picked.

1. From the **Outbound Hub**, locate the Order to be Auto Picked and click the **Order** hyperlink.

2. Click the Auto pick button.



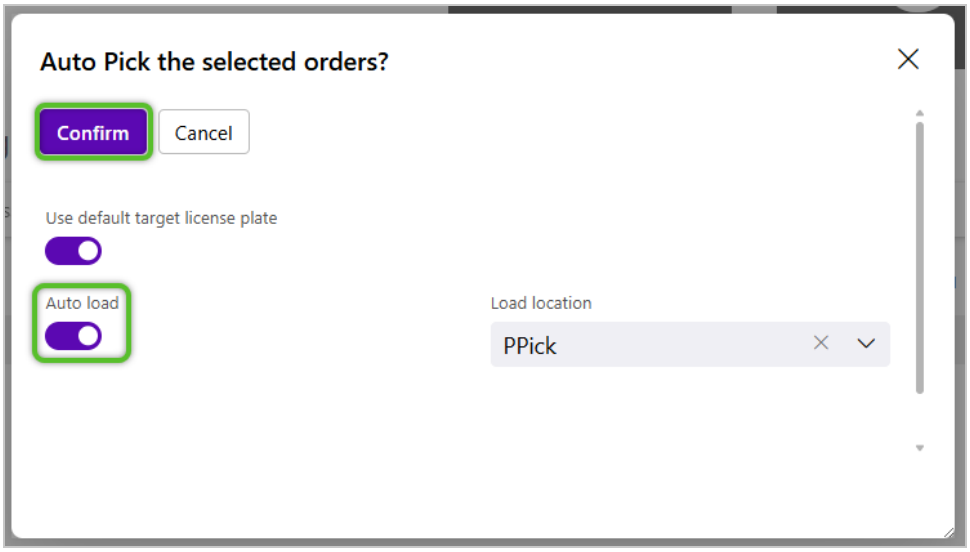
In the **Auto Pick** window, **Auto Load** is selected by default.

2. To **Auto Load and Auto Pick** at the same time, simply select the target **Load Location** and click the blue **Confirm** button.

To **Auto Pick** only, click the **Auto Load** toggle to disable it, then click the blue **Confirm** button.

3. In the **Auto Pick** window, click the blue **Confirm** button.

A progress bar will display in the bottom right corner while the process completes.



The order status will update to **Ready to Load** and **Ready to Complete**, respectively.

When viewing the Outbound Order, in the **Lines** tab, the **Picked** column will display <Actual Amount> / <Expected Amount> and the **Pick Tasks** tab will update to display as **Picked**.

Complete Pack Verification

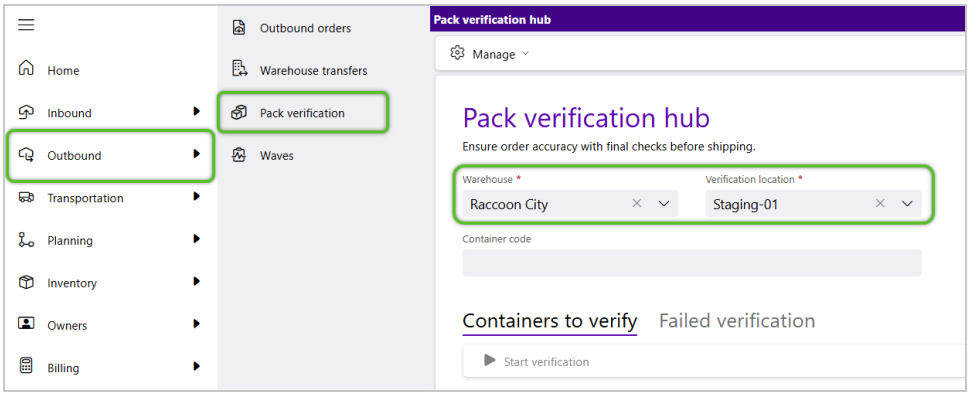
Pack Verification allows users to verify the contents of a shipping container, review relevant instructions, set the container type and dimensions, print manifest, labels, attachments, and/or reports, and add accessorial charges.

Note

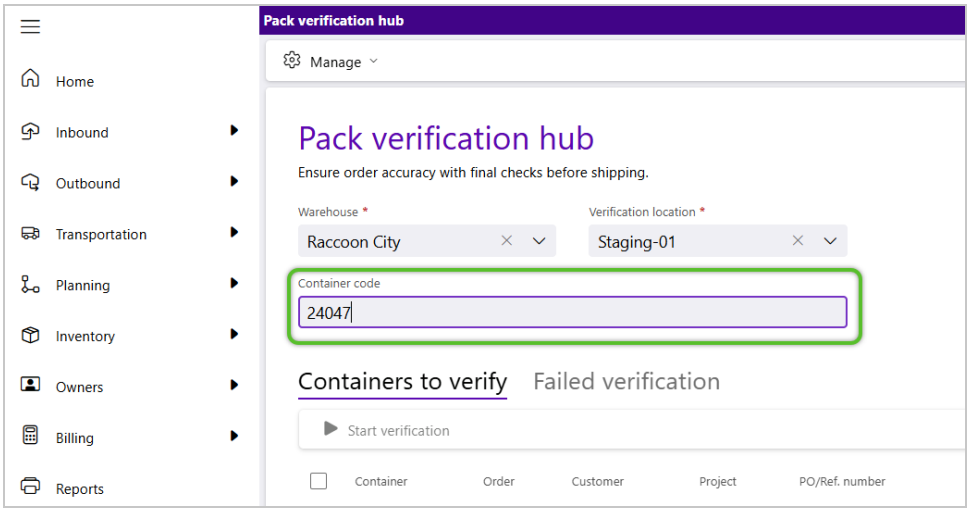
Steps for Pack Verification vary based on the needs of your organization. Optional steps may include instruction review, shipping manifest review and printing, report and label printing, and adding accessorial charges.

1. Click **Outbound** in the left navigation menu, then click **Pack Verification**.

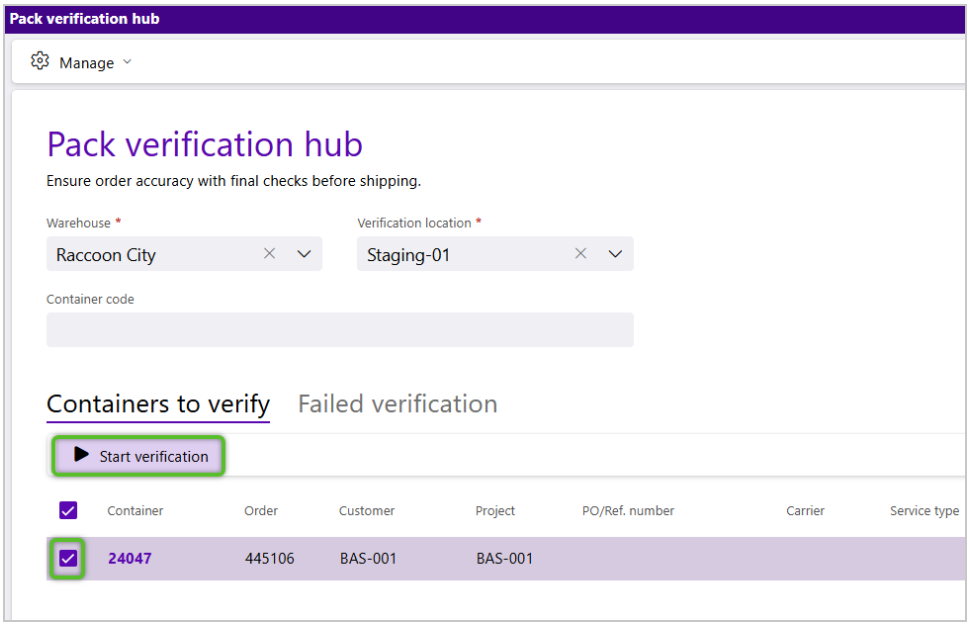
The **Pack Verification Hub** will display with the user's **Warehouse** populated, select a **Verification location**.



2. With your cursor in the **Container Code** field, scan or enter the Container Code to begin Pack Verification.



Alternatively, locate the Container Code in the **Containers to Verify** tab, check the box to the left, and click **Start Verification** in the menu.



Note

Initial Pack Verification is done blind, meaning the user will not see the details to be verified. When Pack Verification fails, the details to be verified will be revealed to users for reverification and management.

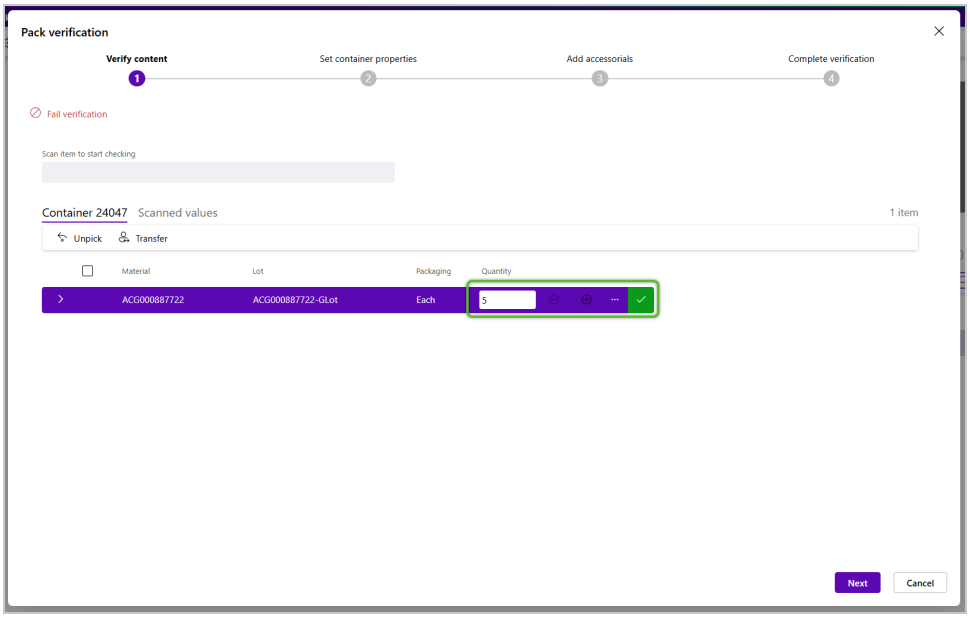
In the **Pack Verification** window, the first step is to **Verify Quantity**. Inventory for the selected Container will be listed in the **Container** tab, then will move to the **Scanned Values** tab after verification.

Note that the **Fail Verification** option is available for each step in the process.

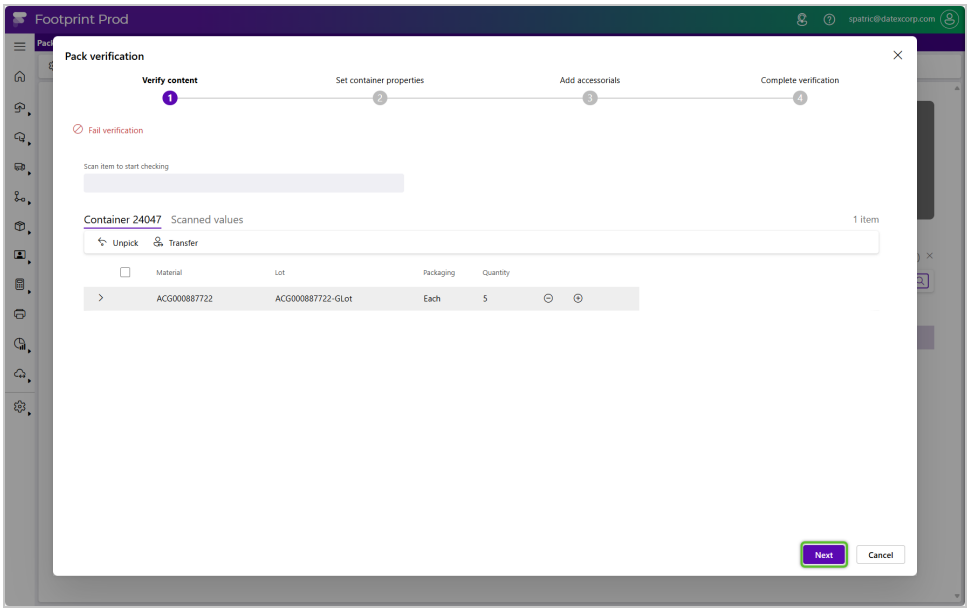
4. Scan (or select) Inventory to begin verification.

5. Alternatively click the **+** plus icon in the right column to increase the Inventory quantity verified, or click to enter the **Verified Quantity** and then confirm by clicking the checkmark.

Some organizations will opt to display Instructions related to the Container.



6. Click the **Next** button in the bottom right to proceed to the next step.



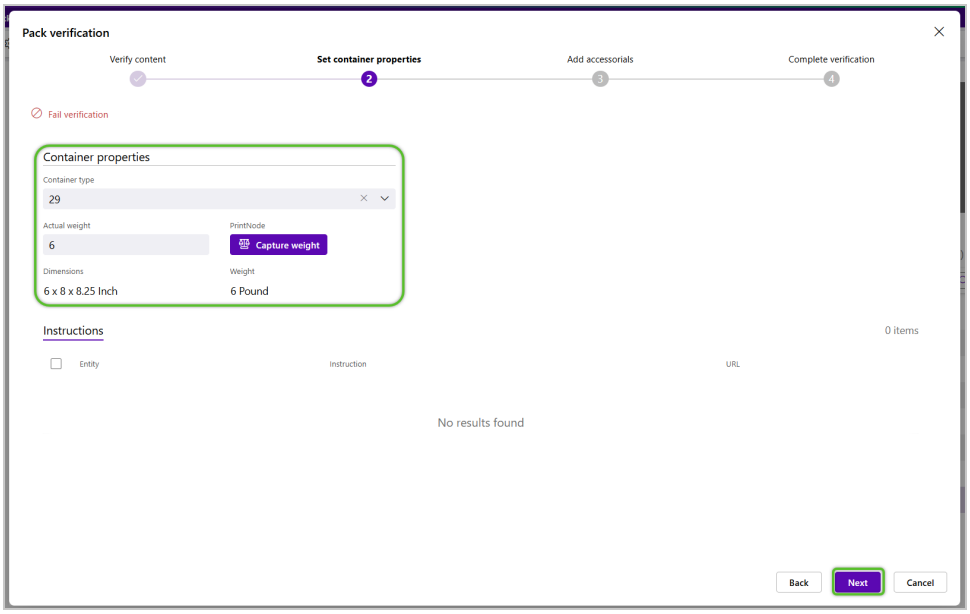
7. In the **Container Properties** section, if necessary, select the **Container Type**.

The container **Dimensions** and **Weight** populate based on the selected **Container Type**.

8. Enter the **Actual Weight** verified.

Some organizations will require Pack Instructions to be checked before being able to proceed.

9. Click the **Next** button to proceed to the next step.

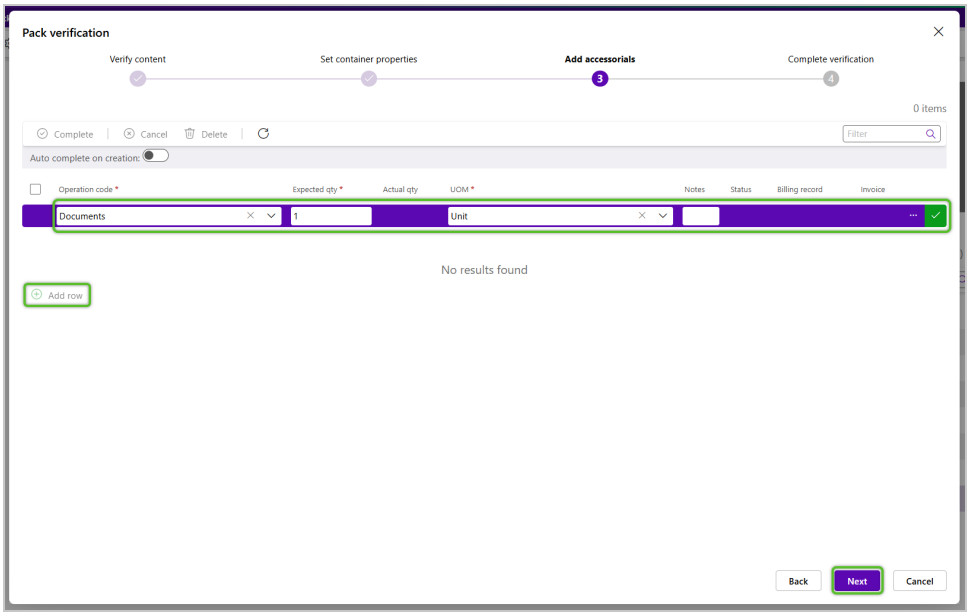


In the optional **Add Accessorials** step, Accessorials are added by adding and completing tasks.

10. To add accessorial charges to the Container, click the green **+Add Row** option.

11. Select the **Operation Code**, enter the **Quantity** and **UOM**, then click the green check mark.

12. Click the **Next** button to proceed to the next step.

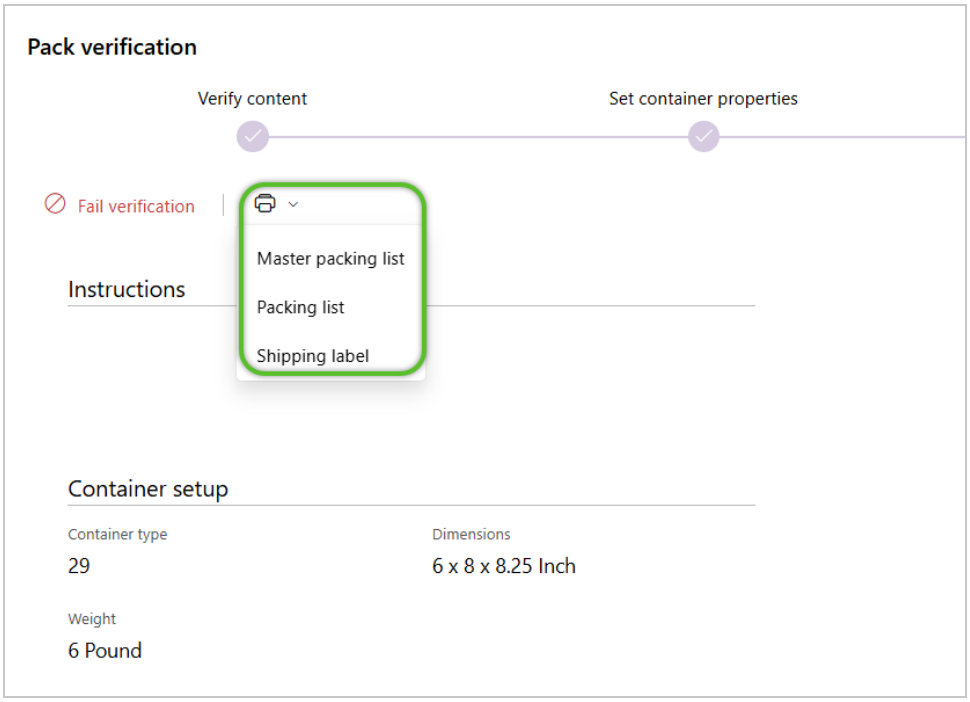


The final **Complete Verification** step (some organizations may have 5 or 6 steps) is read-only.

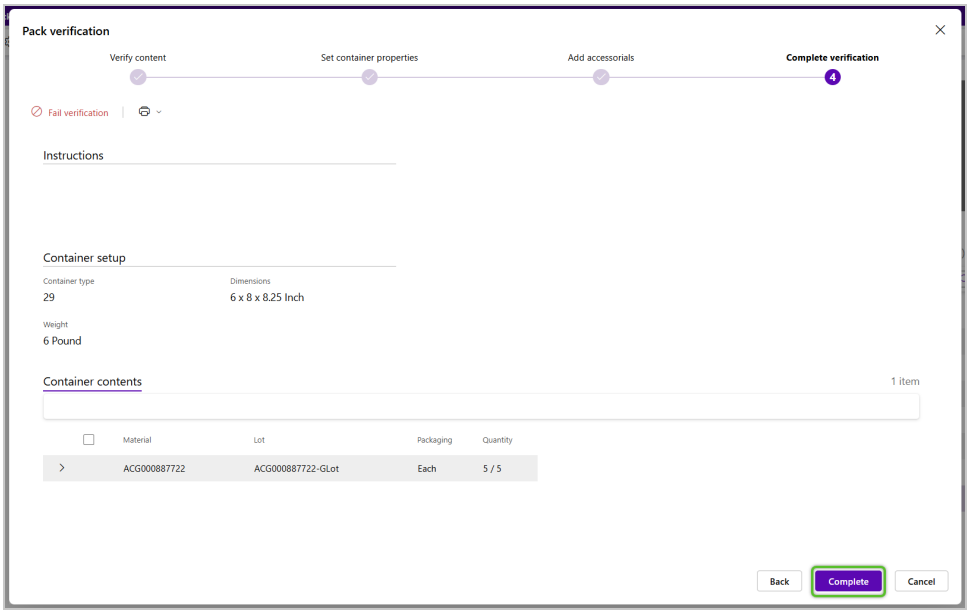
13. Review any applicable **Instructions** and ensure the **Container Setup** details are correct.

14. In the **Container Contents** tab, ensure the **Verified Quantity** shows that 100% of the materials have been verified.

15. **Print** any labels, reports, the manifest, the packing slip, **Attachments**, or other related documentation.



16. Click the **Complete** button.



Fail Pack Verification

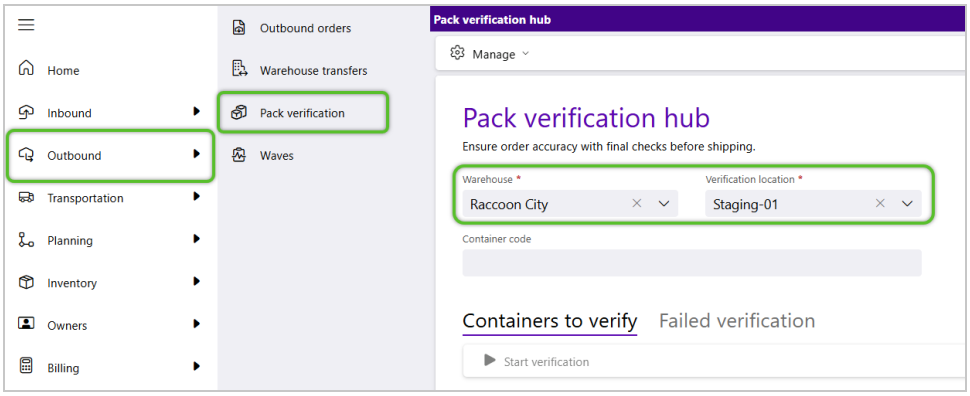
Containers that **Fail Pack Verification** will move to the **Failed Verification** tab for further review and management.

Note

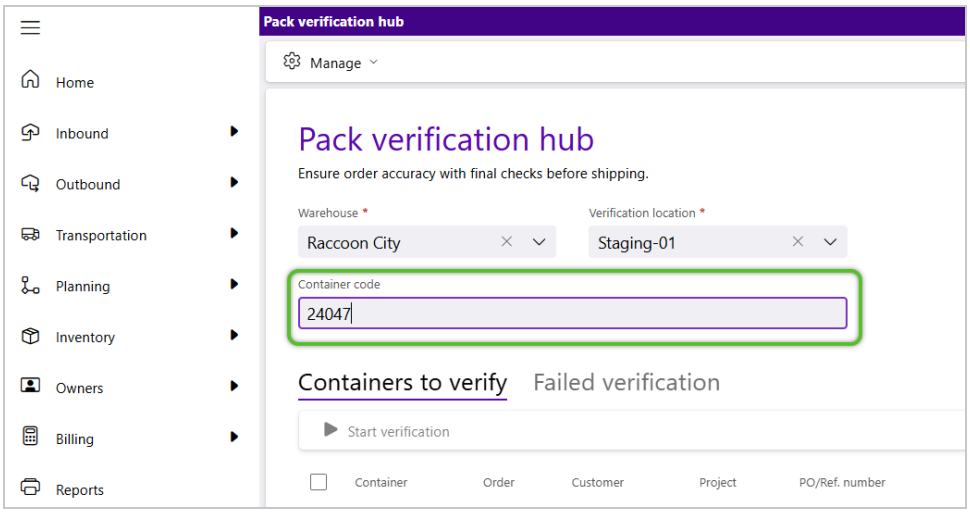
Steps for Pack Verification vary based on the needs of your organization. Optional steps may include instruction review, shipping manifest review and printing, report and label printing, and adding accessorial charges.

1. Click **Outbound** in the left navigation menu, then click **Pack Verification**.

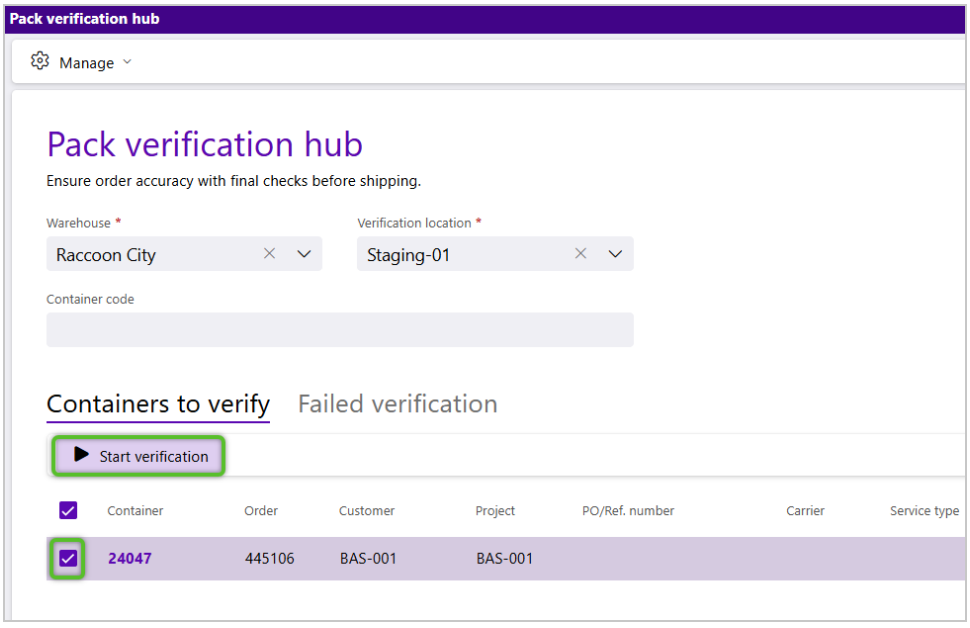
The **Pack Verification Hub** will display with the user's **Warehouse** populated.



2. With your cursor in the **Container Code** field, scan or enter the Container Code to begin Pack Verification.



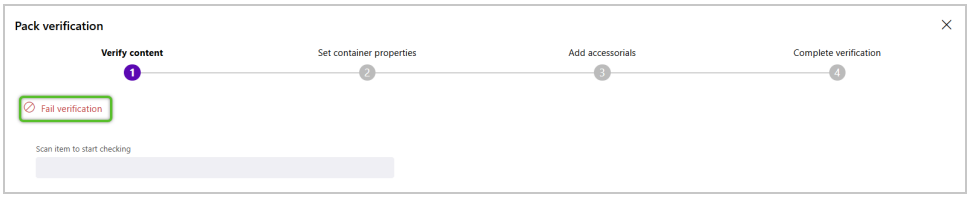
Alternatively, locate the Container Code in the **Containers to Verify** tab, check the box to the left, and click **Start Verification** in the menu.



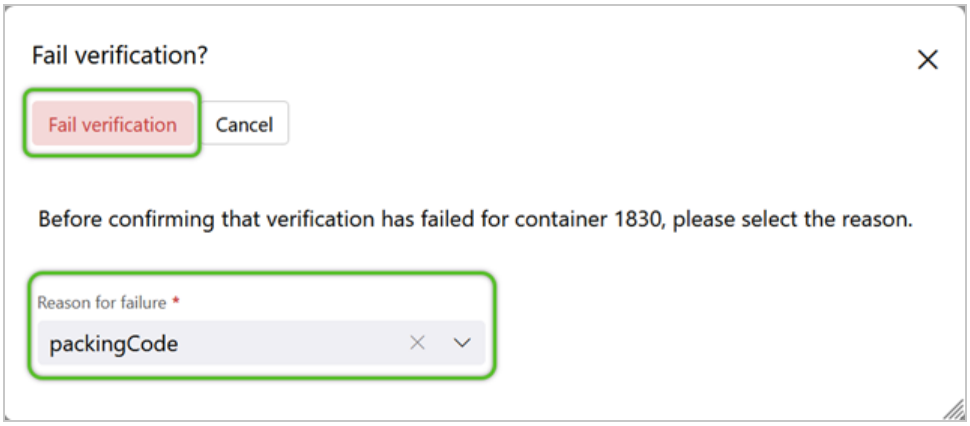
Note

Initial Pack Verification is done blind, meaning the user will not see the details to be verified. When Pack Verification fails, the details to be verified will be revealed to users for reverification and management.

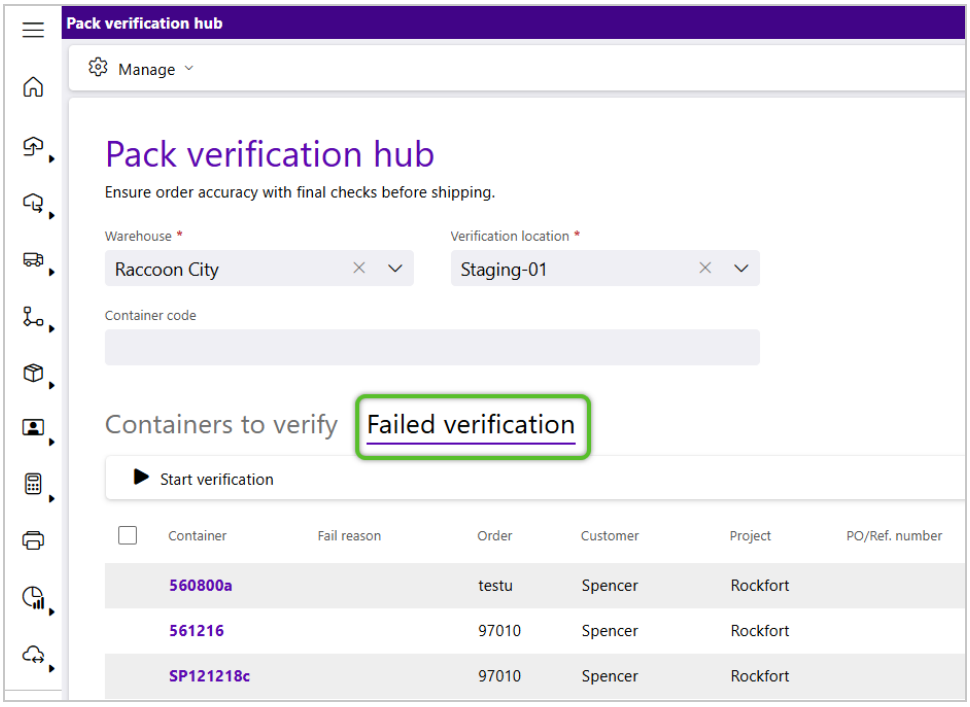
3. In the **Pack Verification** window, click the red **Fail Verification** option near the top of any step.



4. In the **Fail Verification?** window, select a required **Reason for Failure**, then click the red **Fail Verification** option at the top.



The Containers that Fail Verification will move to the **Failed Verification** tab for further review and management.



Unpick Inventory

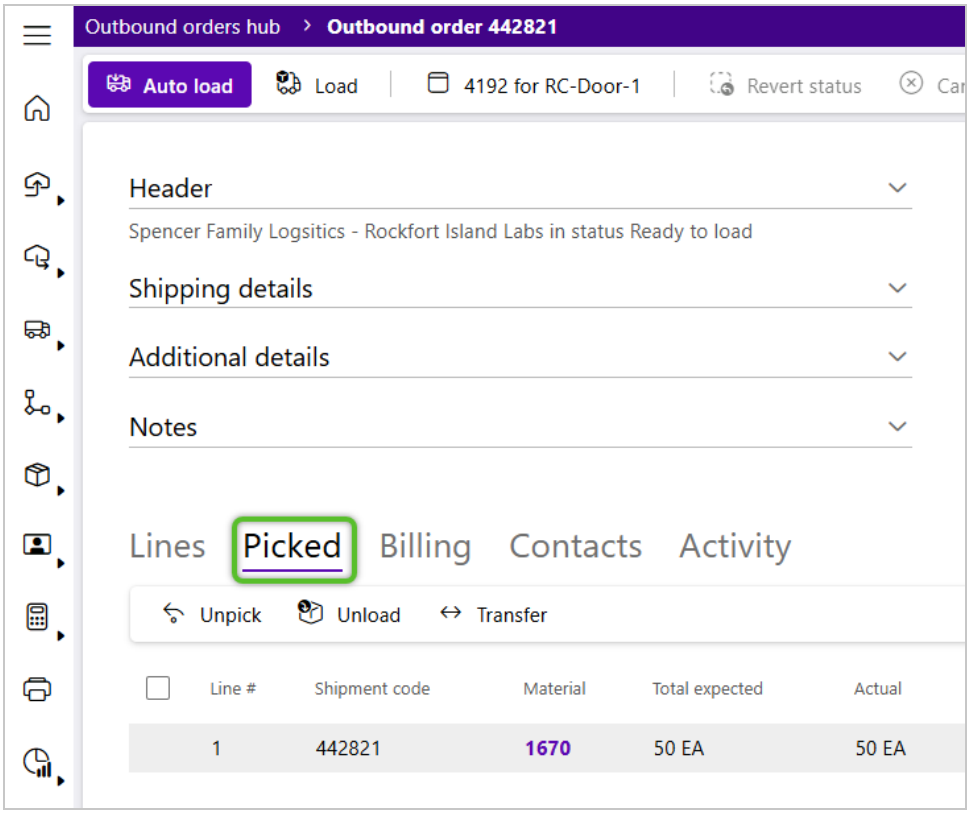
Unpicking allows users to remove inventory that has been picked and added to an Outbound Order. For example, when inventory is no longer needed, or if the inventory picked was damaged and needs to be replaced. Another example would be unpicking inventory so the order can be canceled.

Note

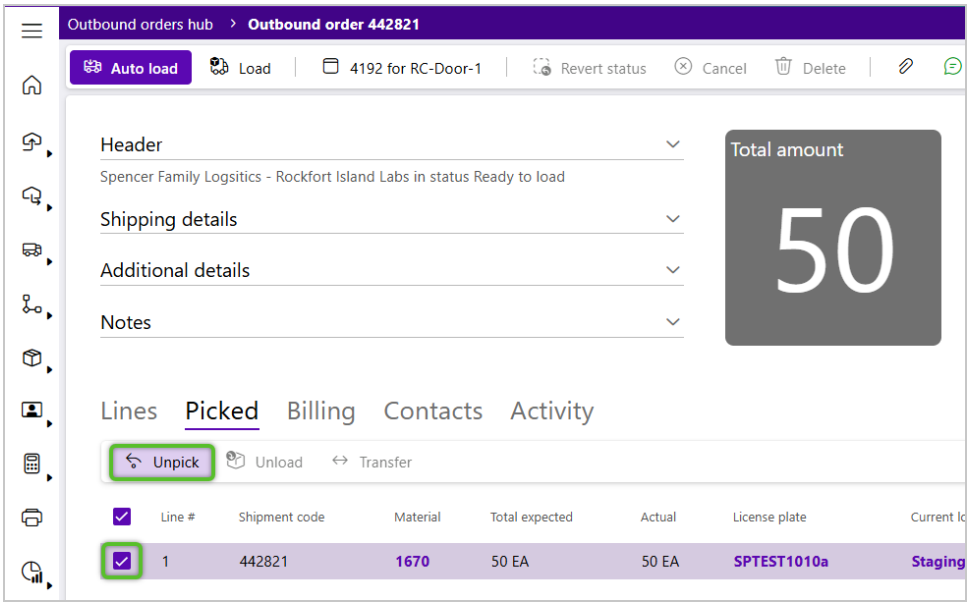
Orders with **Picking in Progress**, **Ready to Load**, and **Ready to Complete** status can be **Unpicked**.

1. From the **Outbound Hub**, locate the Order to be Unpicked and click the blue **Order** number.

2. When the Outbound Order opens, click the **Picked** tab.



3. Check the box(es) for inventory to be Unpicked, then click **Unpick** in the **Picked** tab toolbar.



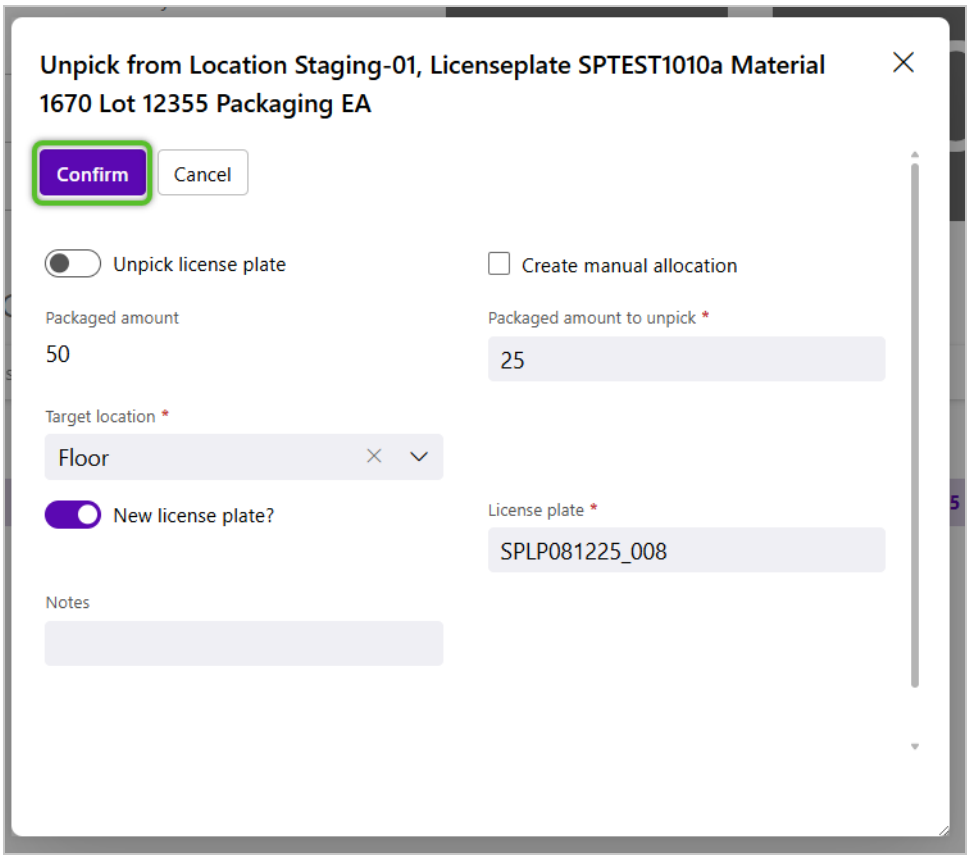
4. In the **Unpicking Inventory** window, enter the **Packaged Amount** to Unpick and select the **Target Location**.

5. To create a new License Plate for the unpicked inventory, click the **New License Plate?** toggle, then tab to enter the new **License Plate**.

6. Enter any relevant **Notes** regarding the unpicking.

7. Review the details are correct, then click the blue **Confirm** button in the top left.

The order status will remain unchanged.



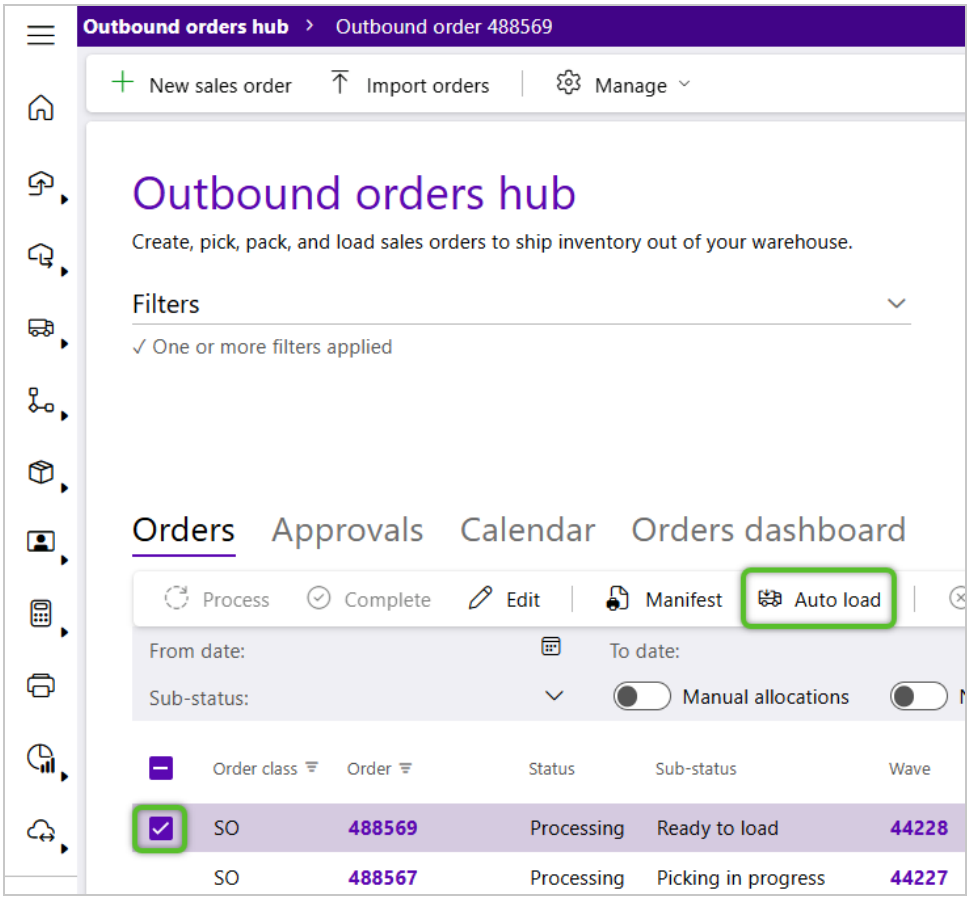
Auto-Load Inventory

Auto Loading is an abbreviated process that doesn't require scanning or entering individual License Plates because it completes the Load action for all License Plates at once. Outbound Orders can be **Auto-Loaded** from the Outbound Hub, as well as from the Outbound Order itself.

Note

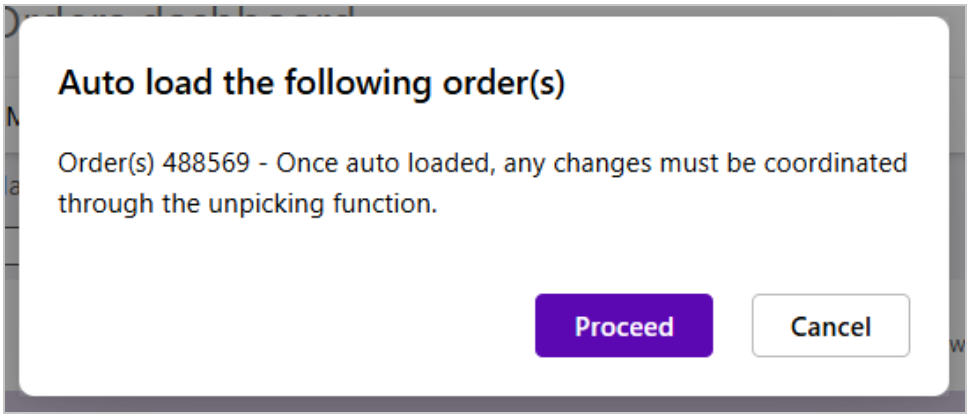
Only those Outbound Orders with **Ready to Load** status can be Auto Loaded.

1. From the **Outbound Hub**, locate the Order to be Auto Loaded, check the box to the left of it, then click **Auto Load** in the **Orders** tab toolbar.



2. Review the details in the **Auto Load these Order(s)** window, then click the blue **Proceed** button.

A progress bar will display in the bottom right corner while the process completes.



3. Click the **OK** button to close the confirmation window summarizing **All Order(s) Auto Loaded**.

The order status will update to **Ready to Complete**.

Note

When an order has a Dock Appointment checked in at a specific dock door, and that dock door is not the "Loaded To" Location, Auto Load will not be allowed. Currently, a Location can only be specified when loading is part of Auto Picking.

Warehouse Transfers Hub

The **Warehouse Transfers Hub** allows you to create and manage all Warehouse Transfers in your system. Warehouse Transfers move inventory from one warehouse in Footprint to another. The Location of the inventory will change to the new warehouse's location, while remaining under the same Owner and Project.

Create and Release a Warehouse Transfer

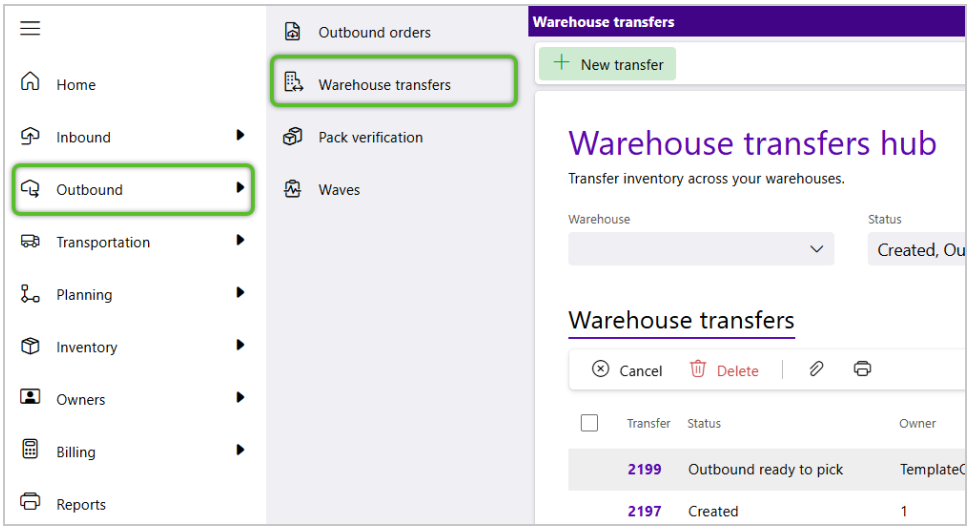
Warehouse Transfers move Inventory from one Warehouse in your system to another. The Inventory remains under the same Owner and Project, so all that is changing is the Location over separate Warehouses.

> **Note**
>
> Creating a Warehouse Transfer also involves the creation of an Outbound Shipment and an Inbound Shipment. Both Shipments will share Order Lines, so the process is streamlined. Following the creation of the Warehouse Transfer Order, you must complete the standard Outbound process, then the Inbound process using ASN Receiving.

1. Click **Outbound** in the left navigation menu, then click **Warehouse Transfers**.

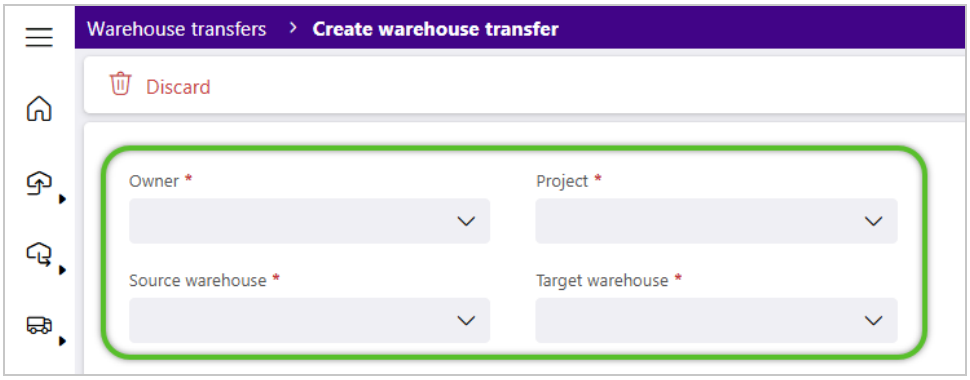
The **Warehouse Transfers Hub** will display.

2. Click **+ New Warehouse Transfer** in the top Warehouse Transfer Hub toolbar.



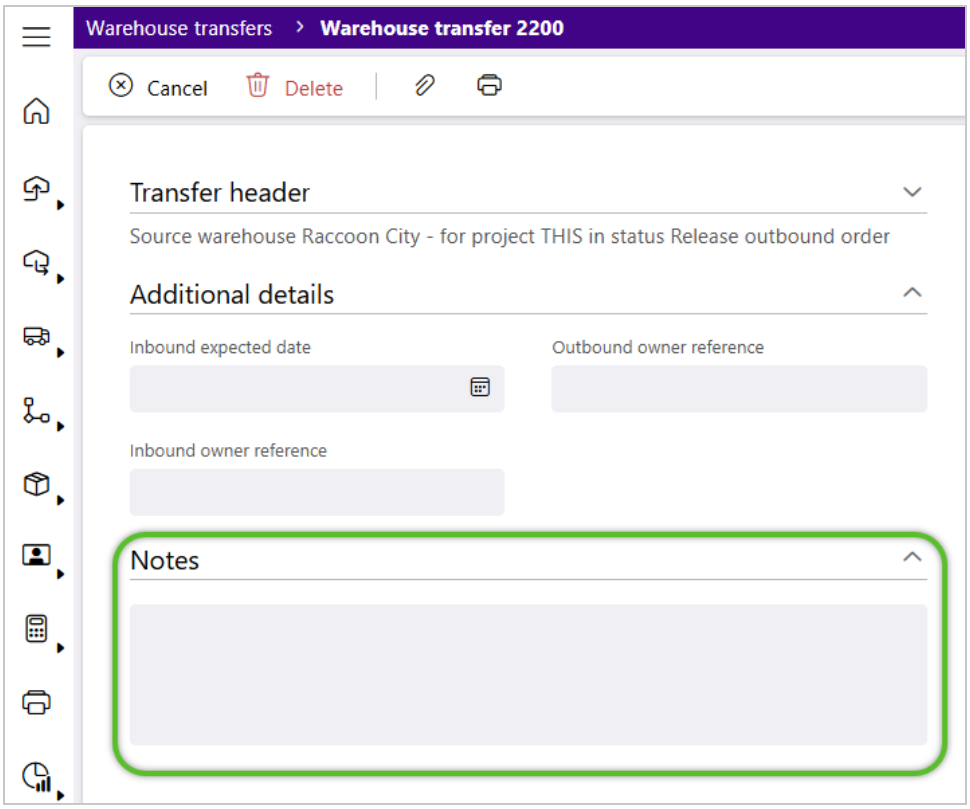
3. In the **Create Warehouse Transfer** window, select the **Owner** and **Project** for the Inventory to be transferred.

4. Select the **Source Warehouse** where the Inventory currently exists, and the **Target Warehouse** to which the materials will be moved.



The **Warehouse Transfer** details window will appear as soon as the required items above have been selected.

5. If needed, enter any **Notes** for the Warehouse Transfer.

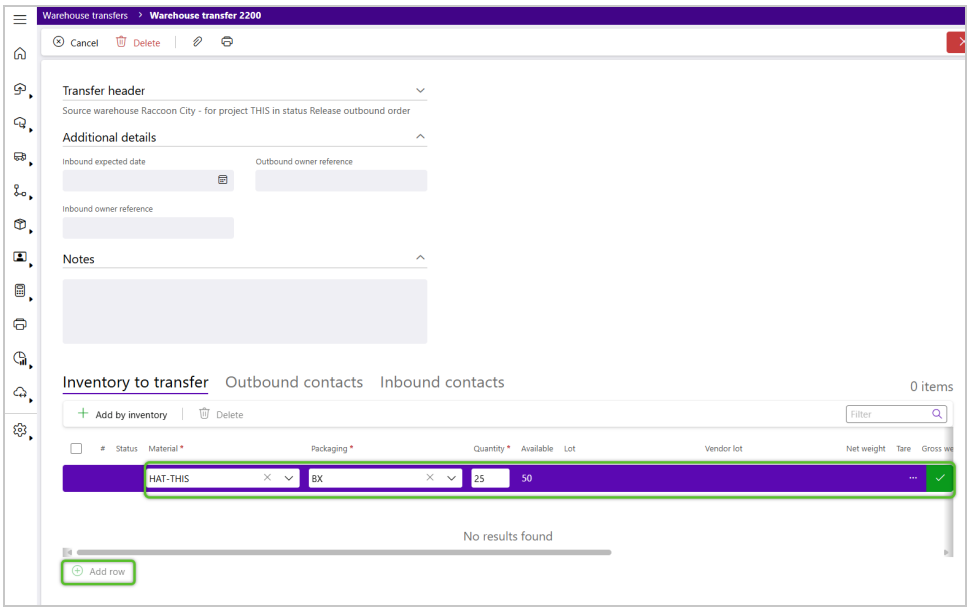


6. Select Inventory to Transfer by entering or searching for Inventory in the **Inventory to Transfer** tab.

Add Inventory Order Lines

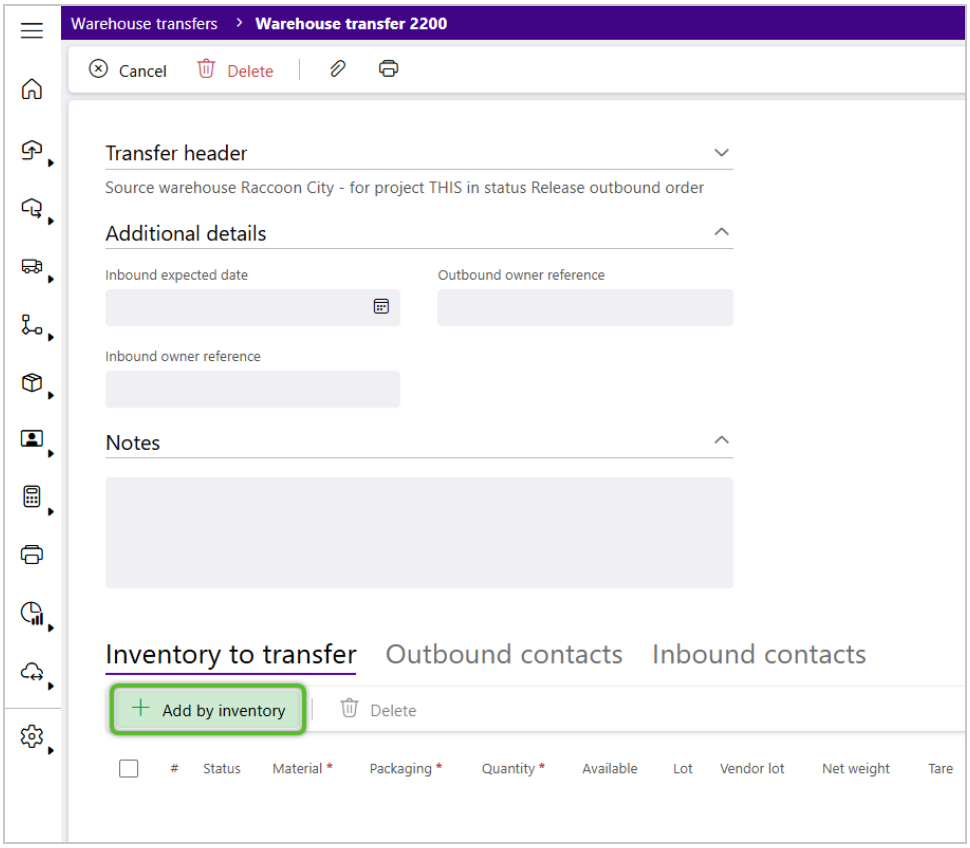
a. To add Inventory using Order Lines, click **+ Add Row** in the bottom left corner of the **Inventory to Transfer** tab.

b. Enter the required **Material**, **Packaging**, and **Quantity**, and any other desired details, then click the green check mark in the right column.

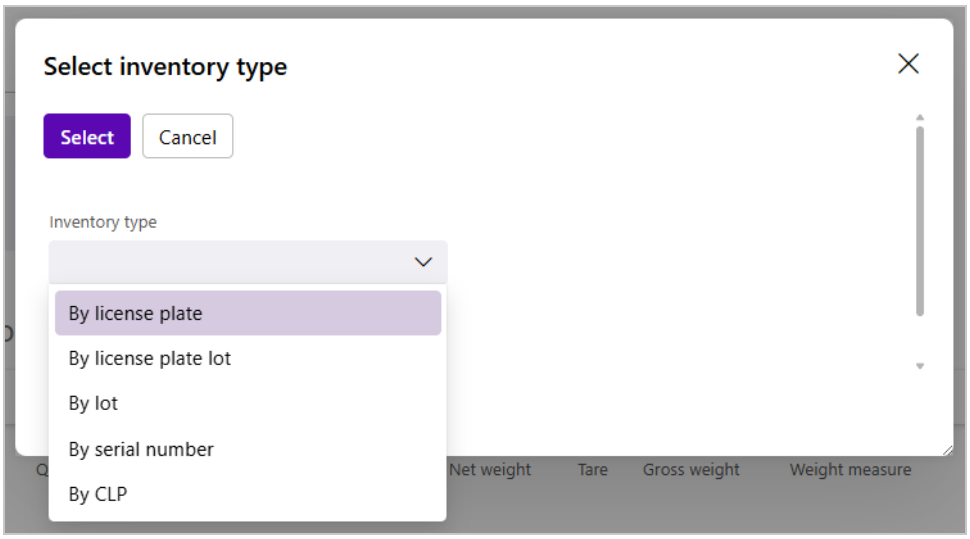


Locate Inventory by Type Wizard

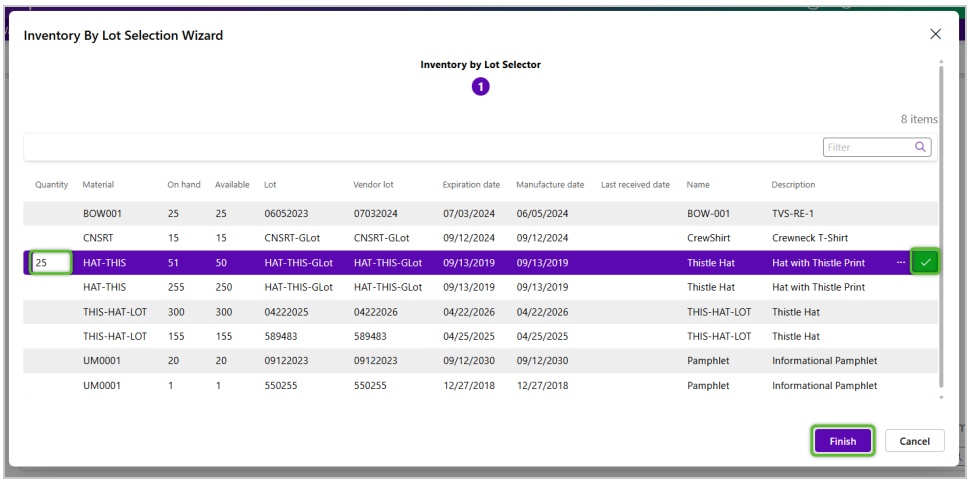
a. To add Inventory by LP, Lot, License Plate Lot, CLP, or Serial, click **+ Add by Inventory** in the **Inventory to Transfer** tab toolbar.



b. Select to search for Inventory **By license plate**, **By license plate lot**, **By lot**, **By serial number**, or **By CLP**, then click the **Select** button to continue to the respective Inventory selection wizard.



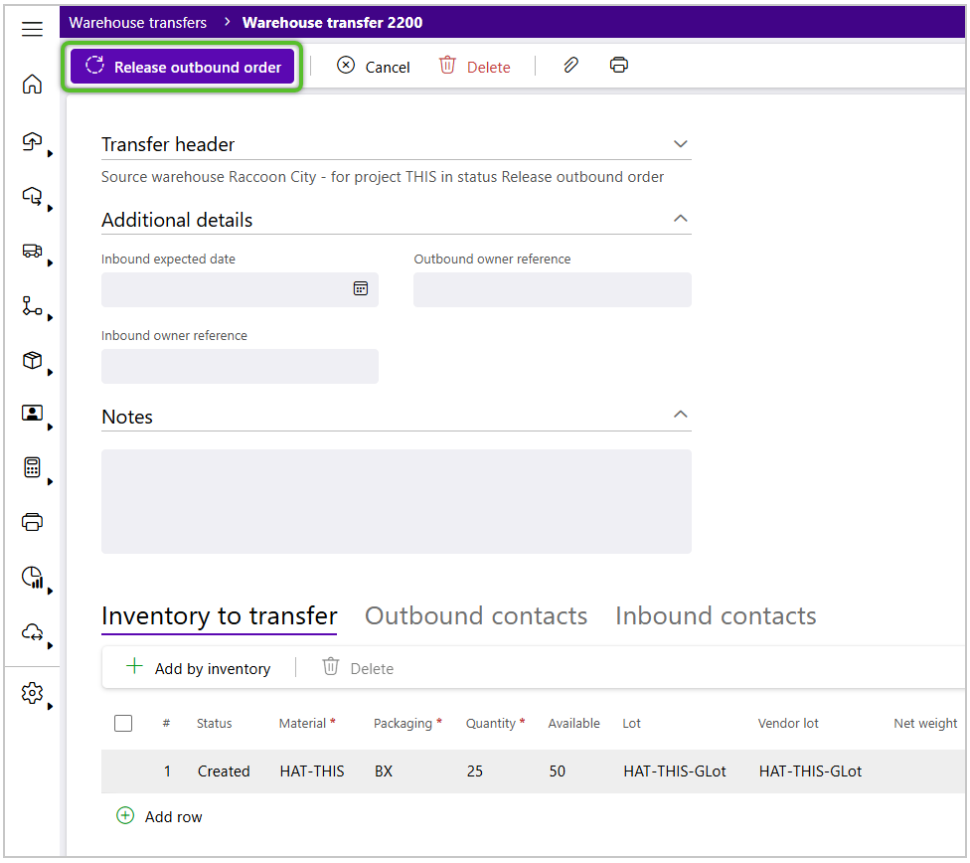
c. Enter the **Quantity** of each Material to be transferred (or select the specific serial lookups if adding Inventory By Serial), click the checkmark to confirm the row, then click the **Finish** button to exit the wizard.



8. Continue adding Inventory until all Materials to be transferred are listed in the **Inventory to Transfer** tab.

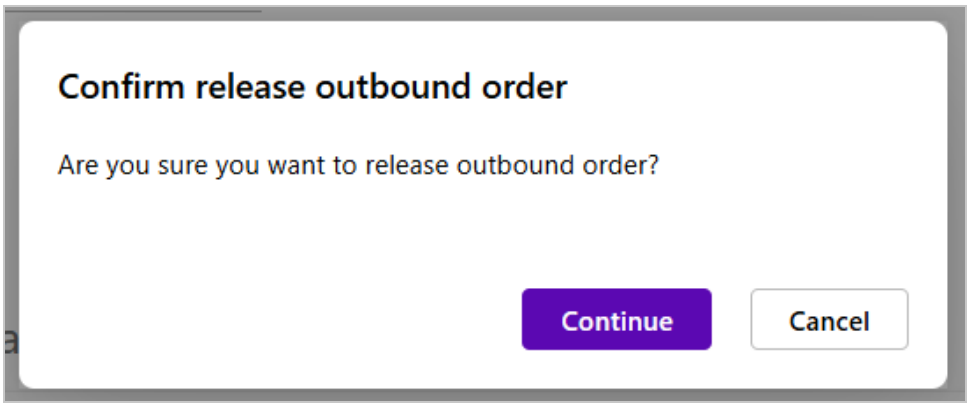
> **Note**
>
> Materials listed in the Inventory to Transfer tab can only be edited when the Warehouse Transfer is in **Created** status. Once the Warehouse Transfer has been Released, only the Notes and Target Warehouse can be updated. While the Outbound and Inbound Orders can be reviewed, they cannot be updated.

9. Once all inventory to be moved has been added to the Warehouse Transfer order, click **Release Outbound Order** in the top toolbar.



10. Click the **Continue** button to confirm release of the outbound order.

The Warehouse Transfer Order will Process and the Wave will be Released.



The transfer will be listed in the Warehouse Transfers Hub with the **Outbound Ready to Pick** status.

Auto-Pick an Outbound Warehouse Transfer

After a Warehouse Transfer has been created and released, it will be listed in the **Warehouse Transfers Hub** with the **Outbound Ready to Pick** status.

1. Click **Outbound** in the left navigation menu, then click **Warehouse Transfers**.

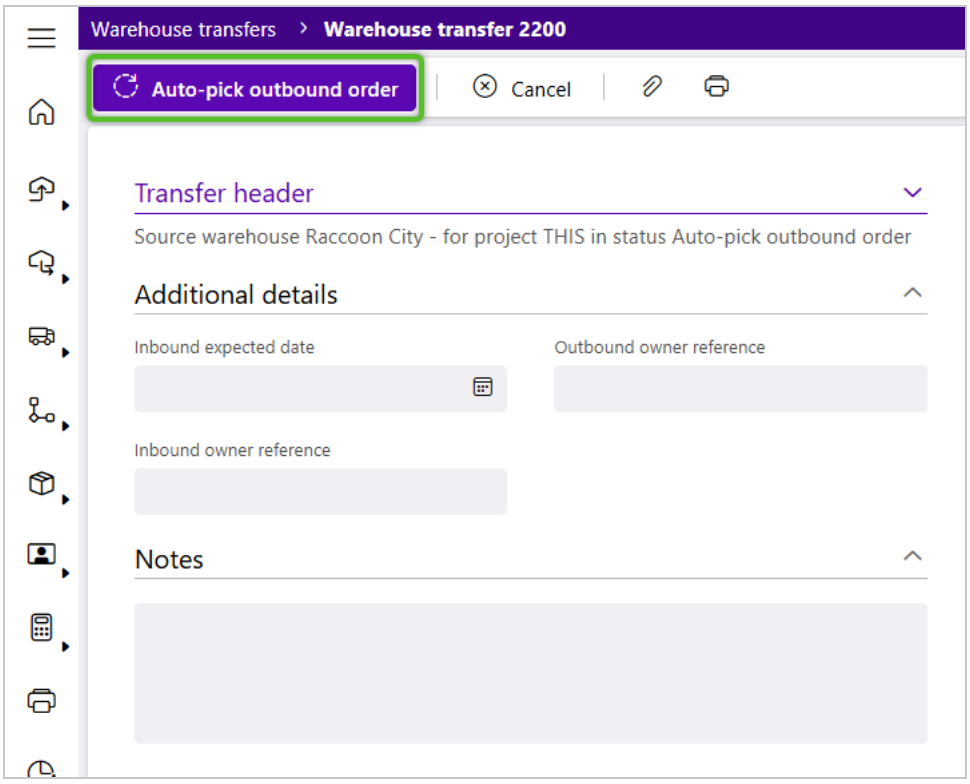
The **Warehouse Transfers Hub** will display.

2. Locate the Warehouse Transfer to be Auto Picked and click the **Outbound Order** number hyperlink.

Tip

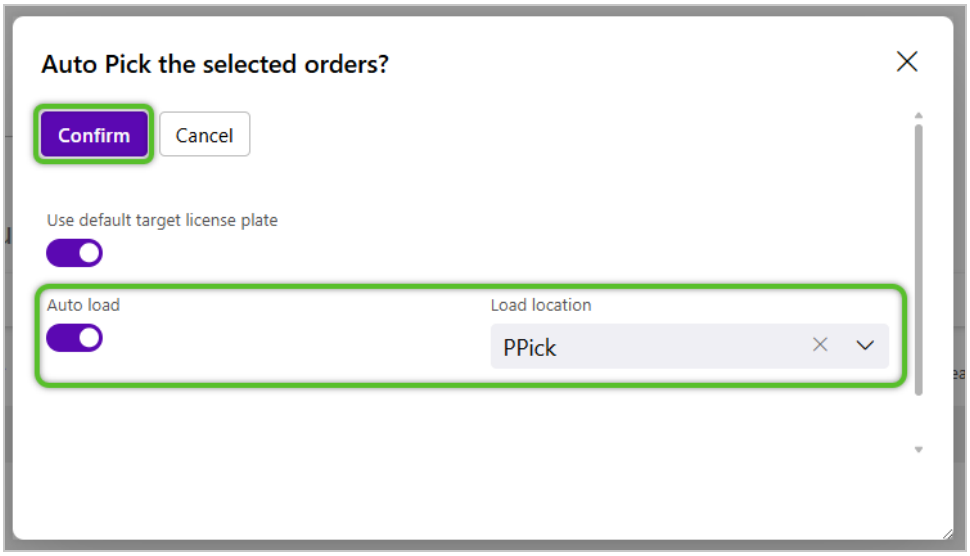
The Auto Pick feature is also available when a user clicks on the Lookup Code for a Warehouse Transfer with the status of **Outbound Ready to Pick**.

3. Click **Auto-pick outbound order** at the top of the outbound order.



4. In the **Auto Pick Selected Orders?** window, the **Use default target license plate** and **Auto Load** toggles are on by default.

5. If using the Auto load option , select the **Load Location** and click the **Confirm** button.



6. Click the **OK** button in the confirmation window.

The Auto Pick will process and the status of the outbound order will update to **Outbound Ready to Complete**.

Complete an Outbound Warehouse Transfer

After a Warehouse Transfer has been picked, it will be listed in the **Warehouse Transfers Hub** with the **Outbound Ready to Complete** status.

1. Click **Outbound** in the left navigation menu, then click **Warehouse Transfers**.

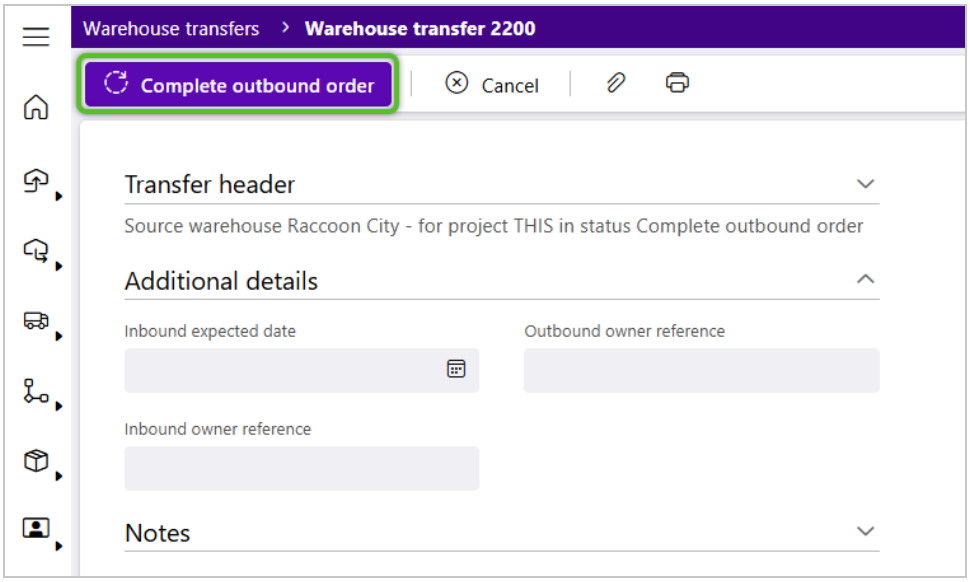
The **Warehouse Transfers Hub** will display.

2. Locate the Outbound Warehouse Transfer to be Completed and click the **Outbound Order** number hyperlink.

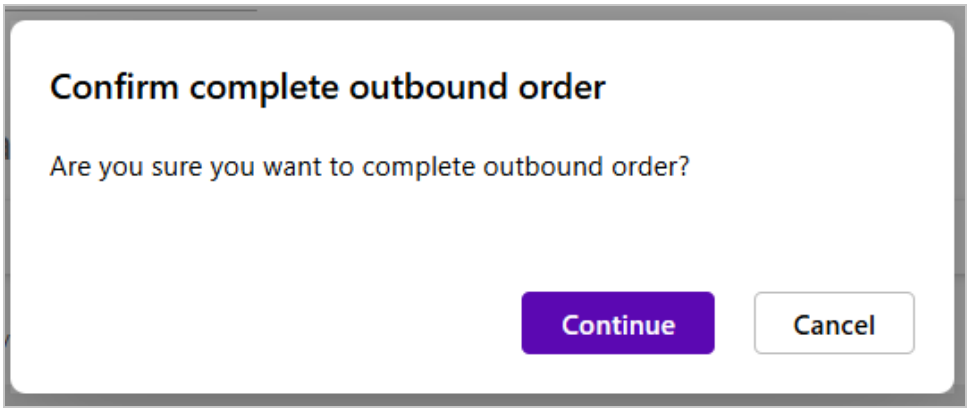
Tip

The Complete feature is also available when a user clicks on the Lookup Code of a Warehouse Transfer with the status of **Outbound Ready to Complete**.

3. Click **Complete outbound order** at the top of the Warehouse Transfer.



4. In the **Confirm complete outbound order** window, click the **Continue** button to confirm completion of the outbound Warehouse Transfer.



The outbound order will complete and the status will update to **Waiting for Inbound**.

Release an Inbound Warehouse Transfer

After an Outbound Warehouse Transfer order has been completed, it will be listed in the **Warehouse Transfers Hub** with the **Waiting for Inbound** status.

1. Click **Outbound** in the left navigation menu, then click **Warehouse Transfers**.

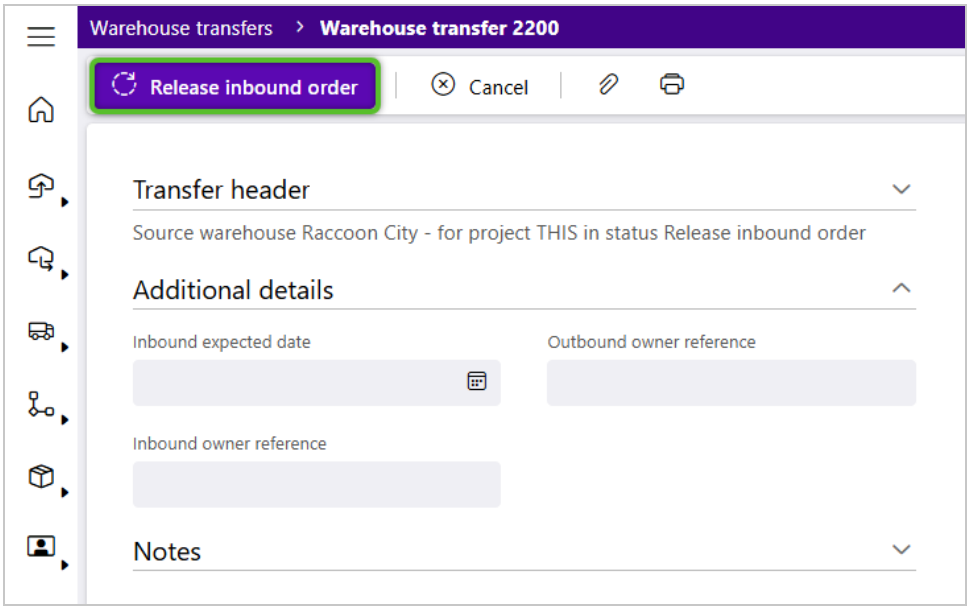
The **Warehouse Transfers Hub** will display.

2. Locate the Warehouse Transfer Order and click on the **Inbound Order** number.

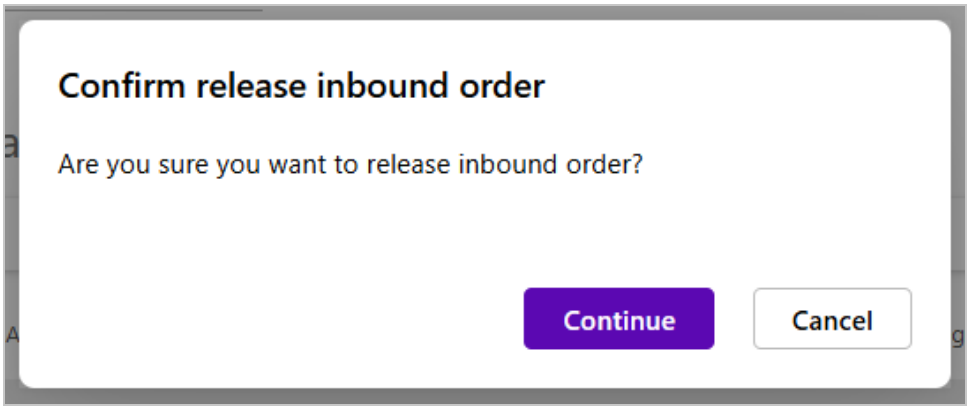
Tip

The **Release (Process) Inbound Order** feature is also available when a user clicks on the Lookup Code of a Warehouse Transfer with the status of **Waiting for Inbound**.

3. Click **Release inbound order** at the top of the Warehouse Transfer.



4. Review the order number is correct, then click the **Continue** button to close the **Confirm release inbound order** window.



The Inbound Warehouse Transfer Order will be released and the status will update to **Inbound Ready to Receive**.

Complete an Inbound Warehouse Transfer

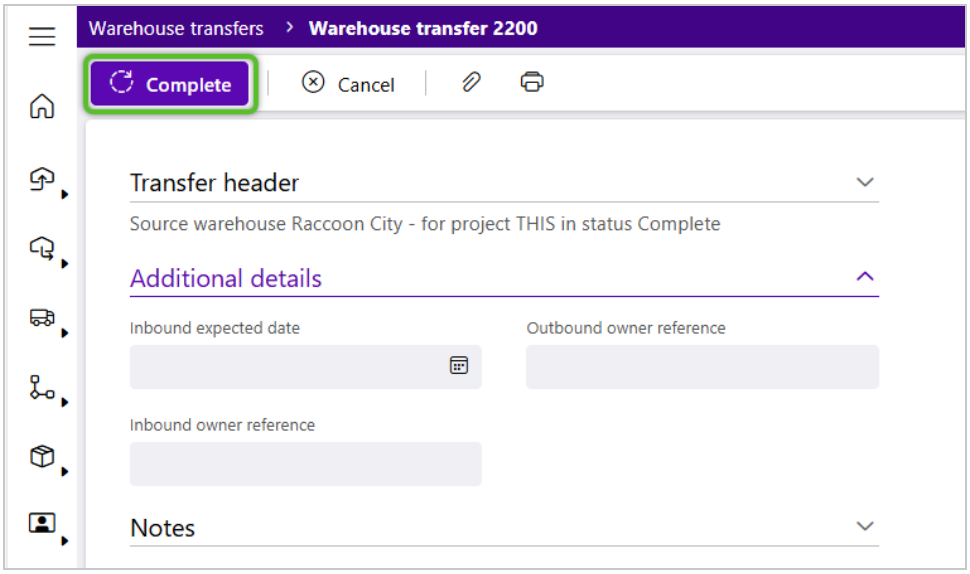
After a Warehouse Transfer order has been received, it will be listed in the **Warehouse Transfers Hub** with the **Ready to Complete** status.

1. Click **Outbound** in the left navigation menu, then click **Warehouse Transfers**.

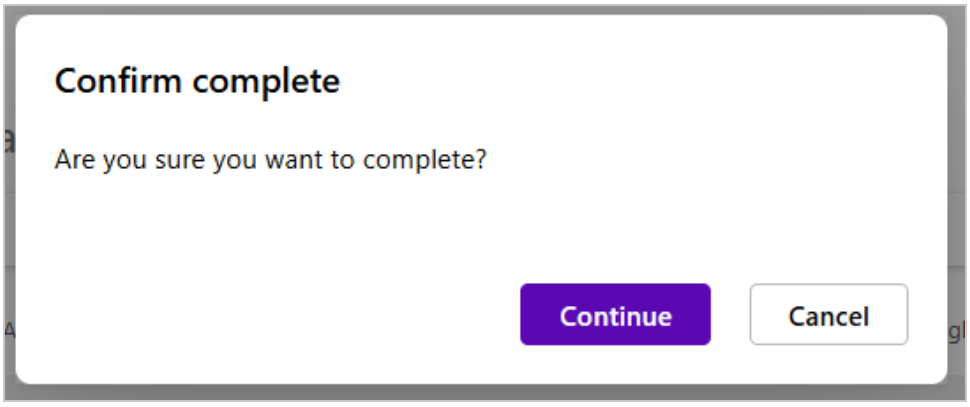
The **Warehouse Transfers Hub** will display.

2. Locate the Warehouse Transfer order to complete and click the **Inbound Order** number.

3. Click **Complete** at the top of the Warehouse Transfer.



4. Click the **Continue** button to close the **Confirm complete** window.



Note

Completed Warehouse Transfers will not appear in the Warehouse Transfers Hub unless specifically filtering for transfers with the status of **Completed**.

Inventory Guide

Sections

- Overview
- Inventory Hub
- Inventory Views

Overview

From the Inventory Hub, users can add, review, and manage Inventory and all related actions across Projects and/or Warehouses. Users can also Manage Container Types, Reason Codes, and Inventory Snapshot Rules from the Inventory Hub.

Inventory can be reviewed and managed from several different perspectives, in addition to the Inventory Hub view. These other **Inventory Views** (submenus) are: Activity, Lots, Serial Numbers, Inventory Transfers, Inventory Counts, Replenishments, and Warehouses.

Inventory Hub

The Inventory Hub allows you to create and import new Inventory, review and manage all existing Inventory, and Manage Container Types, Reason Codes, and Inventory Snapshot Rules. All active Inventory is listed, sorted by Location as the default. In the top, right corner are two tiles indicating the number of **Total Available** and **Total Amount**.

Icons along the top of the Inventory Hub allows users to **Create** or **Import** new Inventory. Users can also **Manage Container Types**, **Manage Reason Codes**, and **Manage Inventory Snapshot Rules** from the Inventory Hub.

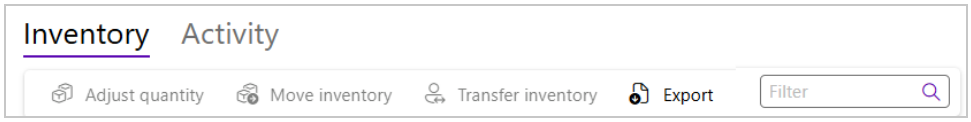
Search and filter options are available to quickly locate Inventory for review and management. Users can filter by Owner, Project, Material, and Warehouse.

Inventory can be sorted by Location, by LP, by Lot, or by Material using the Inventory Types buttons under the Filters.

Inventory displays in the **Inventory** tab, and Activity displays in the **Activity** tab. Each tab on the Inventory Hub displays it's own set of information and options for managing that information. Expand the sections below for more details about each tab.

Inventory

The **Inventory** tab lists all active Inventory. The **Inventory** tab toolbar provides options to manage selected Inventory, such as **Adjust Inventory**, **Move Inventory**, **Transfer Inventory**, and **Export**.



Inventory Details

Warehouse:	The Warehouse in which the Inventory is located.
Parent Zone:	The Parent Zone of the Inventory in the Warehouse.
Location:	The physical Location of the Inventory in the Warehouse.
Project:	The Name of the Project associated with the Inventory.
Material:	The Material name for the Inventory.
Lot:	The Lot ID of the Inventory.
Total Amount:	The total amount of Inventory in the Warehouse.
Available Amount:	The available amount of Inventory in the Warehouse.
Packaging:	The Packaging UOM of the Inventory.
Inbound Order:	The Inbound Order number associated with the Inventory, when applicable.
Vendor Lot:	The Vendor Lot ID of the Inventory.
Expiration Date:	The expiration date of the Inventory.

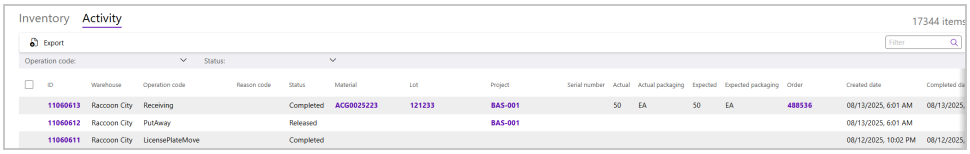
Manufacture Date: The manufacture date of the Inventory.

Received Date: The date the Inventory was marked as Received.

Material Description: The Material description for the Inventory.

Activity

The **Activity** tab displays Activity for Inventory, along with the option to **Export** the details of the selected Activity.



Activity Details

ID: The unique Activity ID for the Inventory Activity.

Warehouse: The Warehouse in which the Inventory Activity is taking place.

Operation Code: The Operation Code of the Inventory Activity.

Status: The Status of the Inventory Activity.

Material: The Material name associated with the Inventory Activity.

Lot: The Lot ID associated with the Inventory Activity.

Project: The Name of the Project associated with the Inventory Activity.

Serial Number: The Serial Number associated with the Inventory Activity.

Actual: The actual amount of Inventory associated with the Task.

Actual Packaging: The Packaging Type used for the Task.

Expected: The expected amount of Inventory associated with the Task.

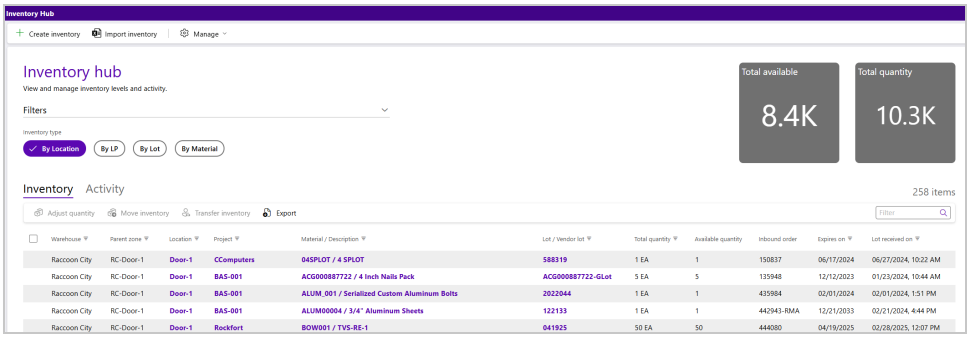
Expected Packaging: The expected Packaging Type used for the Task.

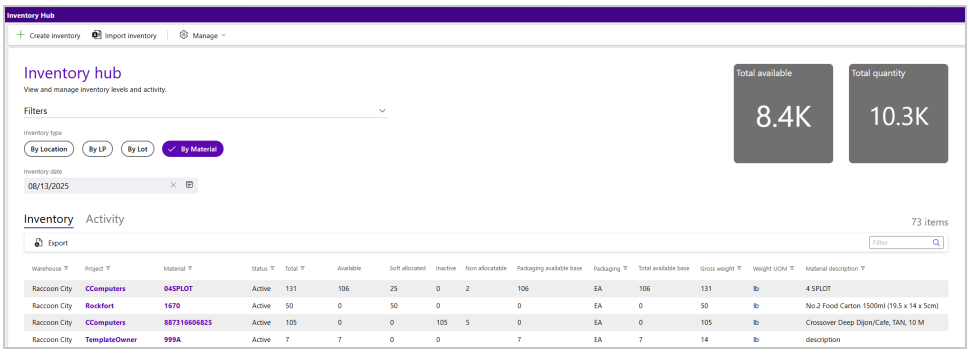
Order: The Order number associated with the Inventory Activity.

Created Date: The Created date of the Inventory Activity.

Completed Date: The Completed date of the Inventory Activity.

User:	The logged in user that completed the Inventory Activity.
Actual Source LP:	The actual Source License Plate associated with the Inventory Activity.
Actual Source Location:	The actual Source Location associated with the Inventory Activity.
Actual Target LP:	The actual Target License Plate associated with the Inventory Activity.
Actual Target Location:	The actual Target Location associated with the Inventory Activity.
Expected Source LP:	The expected Source License Plate associated with the Inventory Activity.
Expected Source Location:	The expected Source Location associated with the Inventory Activity.
Expected Target LP:	The expected Target License Plate associated with the Inventory Activity.
Expected Target Location:	The expected Target Location associated with the Inventory Activity.
Order Reference:	The Order Reference number associated with the Inventory Activity.
Order PO:	The Purchase Order number associated with the Inventory Activity.
Notes:	Any Notes entered for the Inventory Activity.





Inventory 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 other **Inventory Views** (submenus) and the Inventory management options they offer.

Activity

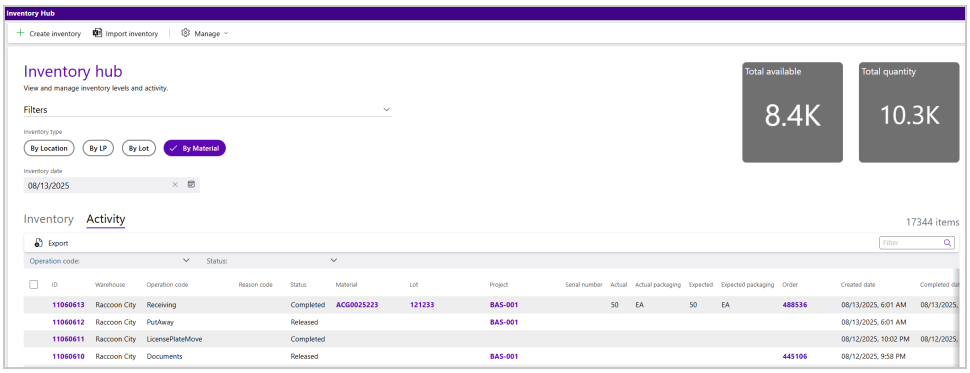
The **Activity Hub** contains details about all Tasks, ranging from the Inventory involved in the Task to the employee who is associated with it. Activity can be filtered by Owner, Project, Warehouse, Operation Codes, and Statuses, as well as **Exported**. In the Activity tab toolbar, the records can be further filtered by Dates.

Footprint is a Task-based system, which means all Activity is tracked. Every action from Receiving Inventory to changing a Status to Completing an Order, is represented by a Task. These individual Tasks carry a wealth of information about the operation being performed, along with a Status for the Task itself.

Activity Details

ID:	The unique Activity ID for the Inventory Activity.
Warehouse:	The Warehouse in which the Inventory Activity is taking place.
Operation Code:	The Operation Code of the Inventory Activity.
Status:	The Status of the Inventory Activity.
Material:	The Material name associated with the Inventory Activity.
Lot:	The Lot ID associated with the Inventory Activity.
Project:	The Name of the Project associated with the Inventory Activity.
Serial Number:	The Serial Number associated with the Inventory Activity.
Actual:	The actual amount of Inventory associated with the Task.
Actual Packaging:	The Packaging Type used for the Task.
Expected:	The expected amount of Inventory associated with the Task.
Expected Packaging:	The expected Packaging Type used for the Task.
Order:	The Order number associated with the Inventory Activity.
Created Date:	The Created date of the Inventory Activity.
Completed Date:	The Completed date of the Inventory Activity.
User:	The logged in user that completed the Inventory Activity.
Actual Source LP:	The actual Source License Plate associated with the Inventory Activity.
Actual Source Location:	The actual Source Location associated with the Inventory Activity.
Actual Target LP:	The actual Target License Plate associated with the Inventory Activity.
Actual Target Location:	The actual Target Location associated with the Inventory Activity.
Expected	The expected Source License Plate associated with the Inventory

Source LP:	Activity.
Expected Source Location:	The expected Source Location associated with the Inventory Activity.
Expected Target LP:	The expected Target License Plate associated with the Inventory Activity.
Expected Target Location:	The expected Target Location associated with the Inventory Activity.
Order Reference:	The Order Reference number associated with the Inventory Activity.
Order PO:	The Purchase Order number associated with the Inventory Activity.
Notes:	Any Notes entered for the Inventory Activity.



Lots

The **Lots Hub** displays all the Lots associated with the Inventory. When Inventory is Lot Controlled (its Control Type is either **Lots** or **LotsSerial**), unique Lots and Vendor Lots for each Material of that type are tracked. Lots can be filtered by Owner, Project, Materials, and Statuses. In the Lots tab toolbar, the records can be further filtered by Dates.

Vendor Lots

Vendor Lots represent the vendor-assigned identification of a particular group of Materials, 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 have an additional Description and Notes. Each Vendor Lot must have at least one Lot.

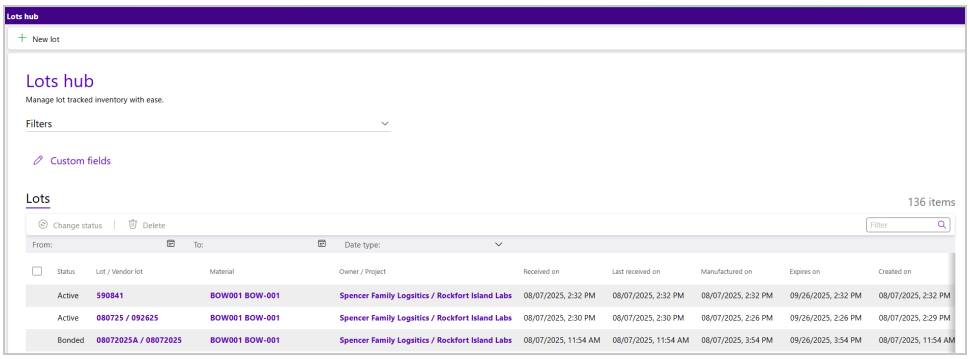
Lot Controlled Materials are grouped together under Vendor Lots and Lots. For example, Swiss Cheese Inventory could be under the 03/15 Vendor Lot, and further under the 03/21 Lot. This allows you to tell apart the batch of Swiss cheese manufactured on 03/15 from the rest of the Swiss cheese in the Warehouse, as well as the specific portion of that batch that was received on 03/21.

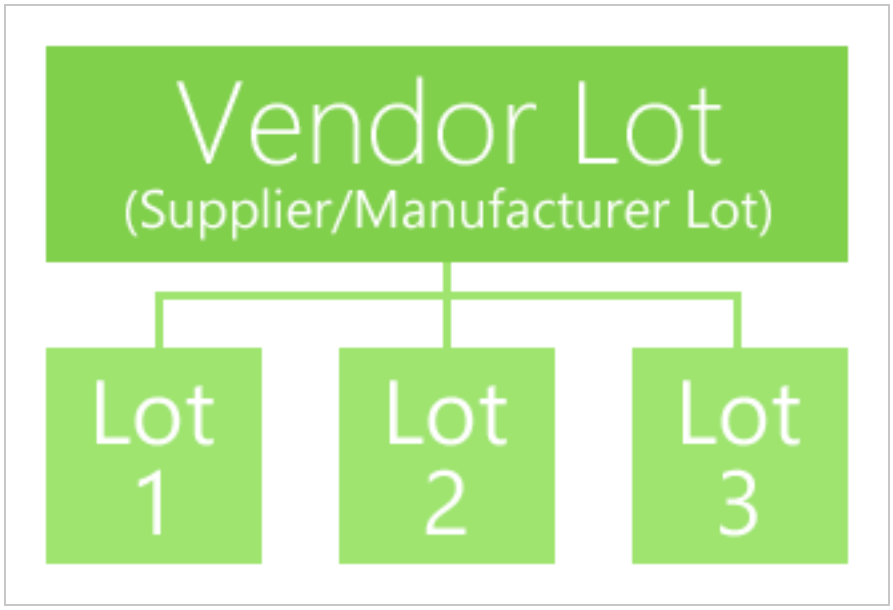
GLots

Inventory that is not Lot Controlled (with a Control Type of either **MaterialLot** or **MaterialLotSerial**) is assigned a Generic Lot, or **GLot**. Each unit of the Material will automatically be assigned this as their Lot and Vendor Lot, eliminating the need to enter any information in these fields.

Lot Details

Material:	The LookUp Code for the Material belonging to the Lot.
Lot/Vendor Lot:	The Lot LookUp and, when applicable, the Vendor LookUp.
Status:	The Status of the Lot.
Receive Date:	The date and time the Lot was first Received.
Last Receive Date:	The date and time the Lot was last Received.
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 in the system about the Lot.
Owner/Project:	The Owner and Project of the Lot.





Serial Numbers

The **Serial Numbers Hub** displays Inventory by Serial Numbers and can be filtered by Owner, Project, Materials, Warehouses, and Archived status. In the Serial Numbers tab toolbar, the records can be further filtered by Lot and Packaging. Options in the Serial Numbers tab toolbar allow you to **Adjust** and **Move Inventory**. In the top, right corner are two tiles indicating the number of **Total Available** and **Total Amount**.

Serial Numbers are a way of identifying each individual item of Inventory, rather than remaining anonymous within the Quantity of that type. When Inventory is Serial Controlled (its Control Type is either **LotsSerial** or **MaterialLotSerial**), the unique Serial Numbers for each unit of the Inventory of that type is tracked.

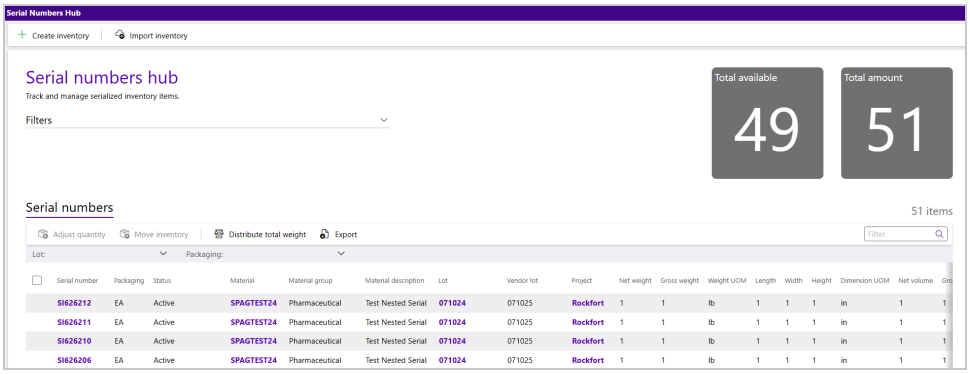
More details about individual Inventory can be tied to Serial Numbers in the form of User Defined Fields, which, along with a unique Task History (detailing where the Inventory has been at what time, its past Statuses, and so on) is also kept with the Serial Number.

Serial Numbers are also used to track Variable Weights and Variable Lengths for Materials, so the precise measurement for each Material is recorded. For any item that is not Serial Controlled but uses Variable Weights or Variable Dimensions, the system will automatically create and assign the item a Serial Number to track it by.

Serial Number Details

ID:	The system 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 belonging to the Serial Number.
Material Group:	The Material Group for the Material belonging to the Serial Number.
Material Description:	A description of the Material belonging to the Serial Number.
Lot:	The Name of the Lot the belonging to the Serial Number.
Vendor Lot:	The LookUp of the Vendor Lot belonging to the Serial Number.
Project:	The Project under which the Serial Numbers are classified.
Net Weight:	The Weight of the Serial Number's Material, not including its Packaging.
Gross Weight:	The Weight of the Serial Number's Material, including its Packaging.
Weight UOM:	The unit by which the Serial Number's Material's weight is measured.
Length:	The Length of the Serial Number's Material.
Width:	The Width of the Serial Number's Material.
Height:	The Height of the Serial Number's Material.
Dimension UOM:	The unit by which the Serial Number's Material's dimensions are measured.
Net Volume:	The Net Volume of the Serial Number's Material.
Gross Volume:	The Gross Volume of the Serial Number's Material.
Volume UOM:	The unit by which the Serial Number's Material's volume is measured.
Created Date:	The date the Serial Numbers were created.
Created User:	The logged in user that created the Serial Numbers.
LP Type:	The Type of License Plate on which the Serial Number is located (Inventory or Shipping)

LP: The License Plate on which the Serial Number is located.
Location: The Location in which the Serial Number is located.
Warehouse: The Warehouse in which the Serial Number is located.
Notes: Any Notes in the system about the Serial Number.



Inventory Transfers

The **Inventory Transfers Hub** allows users to **Transfer Inventory** and manage existing Transfers. The **Process** option in the Transfers tab toolbar allows users to actually Process the Transfer. Inventory Transfers take existing Inventory and either Transfer them to another Owner, or turn them into another Material entirely. Inventory Transfers can be filtered by Warehouses, Source Project, Target Project, and Statuses.

Inventory Transfer Details

Transfer Order: The generated Inventory Transfer LookUp Code, which can be updated by the user.

Status: The current Status of the Inventory Transfer.

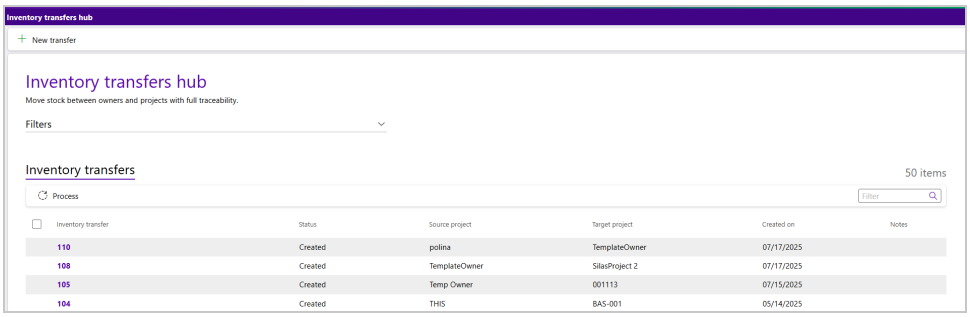
Source Project: A drop-down list from which the current Project for the Inventory is selected.

Target Project: A drop-down list from which the new Project for the Inventory is selected.

Created Date: The new Created Date for the Transferred/Transformed Inventory.

Notes: Any Notes entered for the Inventory Transfer.

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



Inventory Counts

The **Inventory Counts Hub** allows users to **Create an Inventory Count** and manage existing Counts using the **Start**, **Pause**, **Complete**, **Duplicate**, **Cancel**, and **Delete** options in the Count tab toolbar. In the top, right corner are two tiles indicating the number of **Counts in Progress** and the **Accuracy Level** percentage. Inventory Counts confirm that the Inventory in the physical Warehouse matches the information in Footprint. **Counts** can be scheduled to automate the process, allowing users to do a Count of what you want, where you want, whenever you want, all while normal operations continue. In the Counts tab toolbar, the records can be further filtered using a Discrepancies Only toggle and Status selector.

Once a **Count** is released, the child **Count Tasks** are performed on a mobile device, and must be reviewed and completed in Footprint. The individual Count Tasks created from a Count will be listed for review and management on the **Count Tasks** tab. Options in the Count Tasks tab toolbar allow users to **Resolve Discrepancies**, **Recount**, **Cancel**, and **Override** Count Tasks.

Discrepancies occur when a Count Task is performed and License Plate, Material, Lot, Vendor Lot, or Packaging information does not match what is in the system.

Count Details

Status:	The current Status of the Inventory Count.
Count:	The LookUp for the Inventory Count.
Discrepancies:	The number of discrepancies for the Inventory Count, if any.
Description:	A description of the Count.
Warehouse:	The Warehouse in which the Count is scheduled.
Created On:	The Created Date for the Inventory Count.
Created By:	The logged in user that created the Inventory Count.

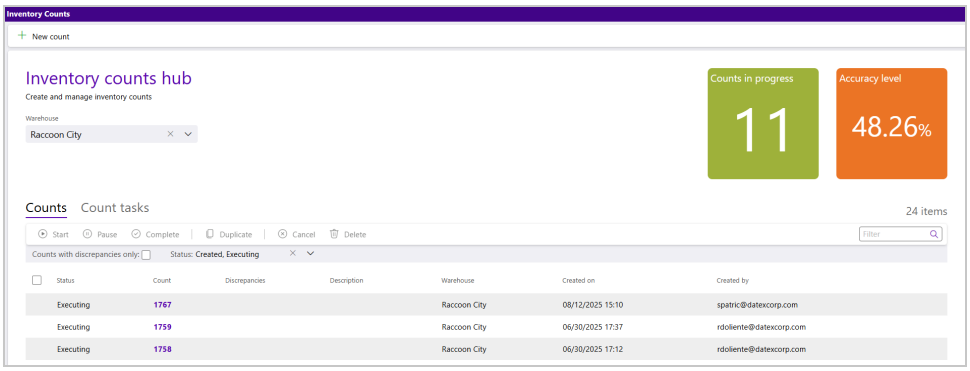
Count Task Details

Status:	The current Status of the Count Task.
Reason:	Any Reason that has been applied to the Count Task.
Count Task:	The ID of the Count Task.
Project:	The Project for the Count Task.
Material:	The Material Counted in the Task.
Expected Quantity:	The Quantity of Packaged Inventory Expected to be Counted.
Counted Quantity:	The Quantity of Packaged Inventory Counted.
Actual Quantity:	The Quantity of Packaged Inventory Actually Counted.
Vendor Lot:	The Vendor Lot of the Inventory Counted in the Task.
Lot:	The Lot of the Inventory Counted in the Task.
License Plate:	The License Plate of the Inventory Counted in the Task.
Warehouse:	The Warehouse in which the Count Task is scheduled.
Location:	The Location in which the Count Task is scheduled.
Storage Category:	The Storage Category associated with the Count Task.
Released	The date the Count Task was Released.

On:

Counted By: The logged in user that completed the Count Task.

Notes: Any Notes entered for the Count Task.



Replenishments

The **Replenishment Hub** displays all Replenishments for any Inventory in your operation. Replenishments are assigned at the Location level and can be filtered by Owner, Project, Materials, Warehouses, and Locations. From here, users can **Add a Replenishment Rule** and **Add a Top Up**.

Each Replenishment listed in the **Replenishments** tab, when created, generates child Replenishment Tasks listed in the **Tasks** tab. The **Current Inventory** tab allows users to quickly **Move Inventory** for Replenishments as needed.

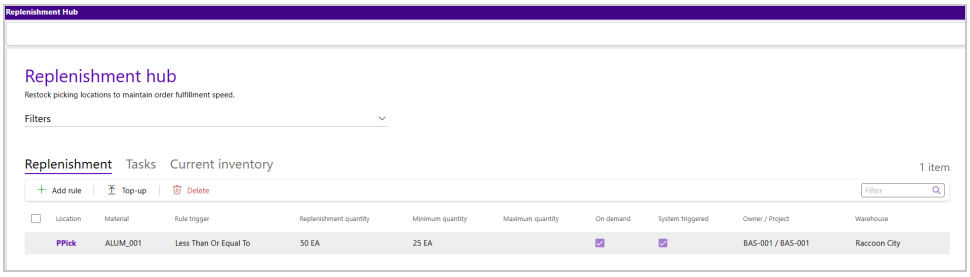
Replenishment Details

Location:	The Location that holds the Replenishment.
Material:	The Material for the Replenishment.
Rule Trigger:	The Replenishment Rule that will trigger Replenishment Tasks to be automatically created.
Minimum Quantity:	Once the number of packaged Inventory in the Location drops below this number, a Replenishment Task will be created.
Replenishment Quantity:	The number of packaged Inventory that will be Moved to the Location during standard Replenishment.
Maximum Quantity:	The maximum total of packaged Inventory that can be stored.
On Demand:	A check box indicating whether or not the Inventory can be Replenished On Demand.
System Triggered:	A check box indicating whether or not the Replenishment Tasks for the Replenishment can be automatically created.
Owner:	The Owner of the Replenishment Inventory.
Project:	The Project under which the Replenishment Inventory is classified.
Warehouse:	The Warehouse that holds the Replenishment Inventory.

Replenishment Task Details

ID:	The system ID for the Replenishment Task.
Warehouse:	The Warehouse in which the Replenishment Task is scheduled.
Status:	The current Status of the Replenishment Task.
Material:	The Material Replenished in the Task.
Lot:	The Lot of the Inventory Replenished in the Task.
Project:	The Project for the Replenishment Task.
Expected:	The Quantity of Packaged Inventory Expected to be Replenished.
Expected Packaging:	The Packaging UOM of the Inventory Expected to be Replenished.
Actual:	The Quantity of Packaged Inventory Actually Replenished.
Actual Packaging:	The Packaging UOM of Inventory Actually Replenished.
Created Date:	The date the Replenishment Task was Created.

Expected Target Location:	The Expected Target Location of the Replenishment Task.
Expected Target LP:	The Expected Target License Plate for the Replenishment Task.
Expected Source Location:	The Expected Source Location of the Replenishment Task.
Expected Source LP:	The Expected Source License Plate for the Replenishment Task.
Actual Target Location:	The Actual Target Location of the Replenishment Task.
Actual Target LP:	The Actual Target License Plate for the Replenishment Task.
Actual Source Location:	The Actual Source Location of the Replenishment Task.
Actual Source LP:	The Actual Source License Plate for the Replenishment Task.
Completed Date:	The date the Replenishment Task was Completed.
User:	The logged in user that completed the Replenishment Task.
Notes:	Any Notes entered for the Replenishment Task.



Warehouses

The **Warehouses Hub** is where you setup and organize each Warehouse, the highest level of the physical storage hierarchy. All **Locations**, **Zones**, and **Equipment** are contained inside a Warehouse and can be managed from the Warehouses Hub. More advanced Location Rules are set here as well, including **Storage Categories**, **Mixing Restrictions**, **Picking, Packing, and Putaway Sequences**, and so on.

The **Warehouses Hub** can be filtered by Warehouse and Time zone, and provides a broad view of what Inventory is stored in each Location. Using the **Warehouses**, **Replenishments**, **Equipment**, and **Pallets** tabs, users can **Move Inventory**, manage **Equipment**, perform **Pallet Transactions**, and more. In the top, right corner are two tiles indicating the number of **Total Locations** and **Empty Locations**.

Areas and **Zones** are sections of the Warehouse that can represent rooms, aisles, shelves, etc. They cannot, however, hold Inventory. Areas and Zones instead can contain Locations, which, in turn, hold the Inventory. The only difference between Zones and Areas is that Zones can be assigned Storage Categories and be Enabled or Disabled, while Areas cannot.

Locations are the subsection of the Warehouse that are actually capable of holding Inventory. It is this level that can have License Plates and Inventory assigned to it. Locations can exist on the base level of the Warehouse, but are more commonly contained within Areas or Zones.

A **Yard Location** is designed to simulate a warehouse yard. It can hold Inventory like a normal Location, but is not intended to be a permanent storage location.

To use mobile devices in the warehouse, the Equipment must first be set up here, in the virtual Warehouse. **Equipment Locations** function similarly to Locations, in that they can store Inventory, representing the transitional period when moving Inventory from one Location to another.

Warehouse Details

Name:	The Name of the Warehouse in Footprint.
Time Zone:	The Time Zone of the Warehouse.
Type:	The Type of Warehouse.
Notes:	Any Notes in the system about the Warehouse.

Replenishment Details

Location:	The Location that holds the Replenishment.
Material:	The Material for the Replenishment.
Rule Trigger:	The Replenishment Rule that will trigger Replenishment Tasks to be automatically created.
Minimum Quantity:	Once the number of packaged Inventory in the Location drops below this number, a Replenishment Task will be created.
Replenishment Quantity:	The number of packaged Inventory that will be Moved to the Location during standard Replenishment.
Maximum Quantity:	The maximum total of packaged Inventory that can be stored.
On Demand:	A check box indicating whether or not the Inventory can be Replenished On Demand.
System Triggered:	A check box indicating whether or not the Replenishment Tasks for the Replenishment can be automatically created.

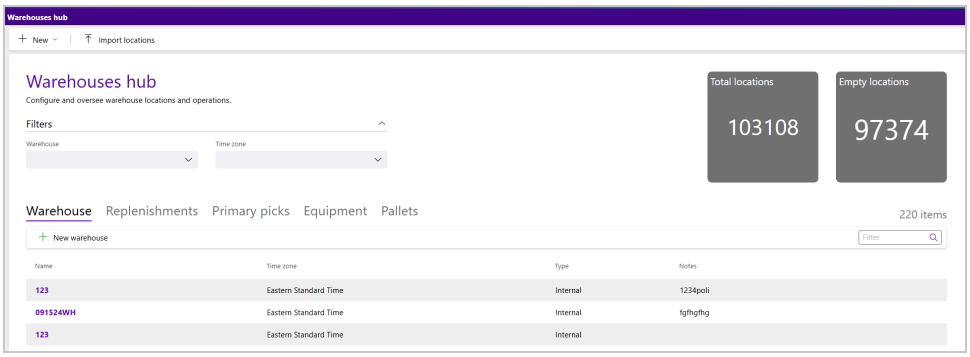
Owner: The Owner of the Replenishment Inventory.
Project: The Project under which the Replenishment Inventory is classified.
Warehouse: The Warehouse that holds the Replenishment Inventory.

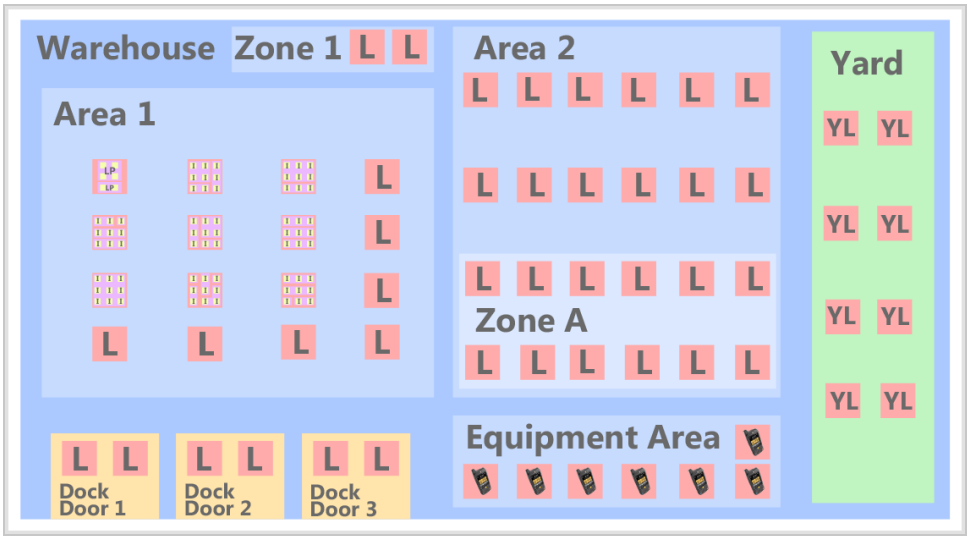
Equipment Details

Device ID: The ID of the Equipment.
Type: The Type of Equipment.
MAC Address: The MAC Address of the Equipment.
Warehouses: The Warehouse(s) in which the Equipment can be used.

Pallet Details

Pallet Class: The name of the Pallet Class for the Pallets.
Amount: The number of Pallets belonging to the Pallet Class.
Associated Projects: The Project(s) associated with the Pallets.



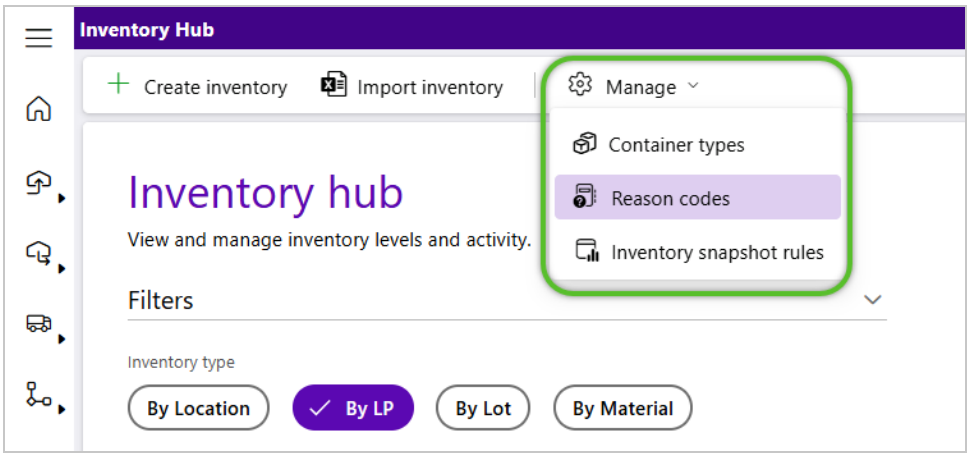


Manage Reason Codes

Reason Codes allow users to provide background information for events that occur in the Warehouse. Reason Codes can also be entered from a mobile device, and in many situations are required.

View Reason Codes

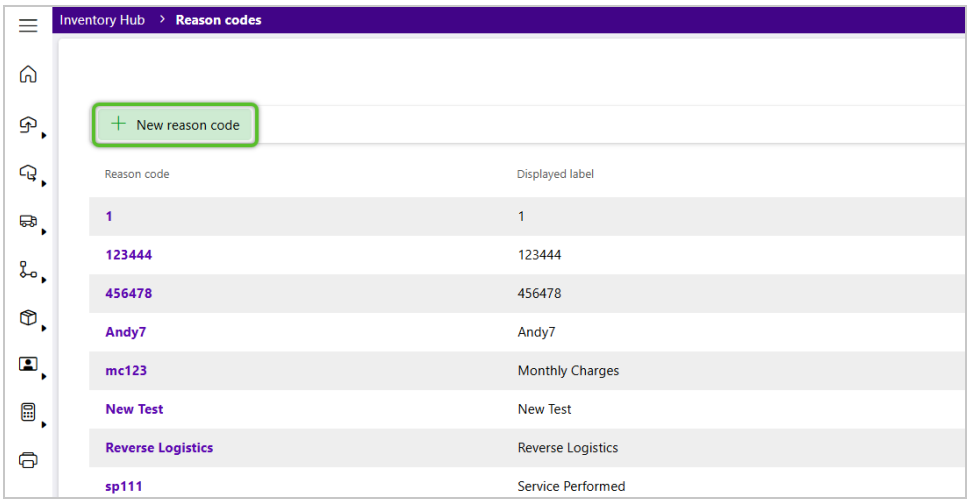
1. From the **Inventory Hub**, click the **Manage** option in the top toolbar, then select **Reason Codes**.



The **Reason Codes** will display.

Create Reason Codes

1. Click the **+ Reason code** button at the very bottom left of the Reason Code list.



2. Select the **Reason entity** for the Reason Code.

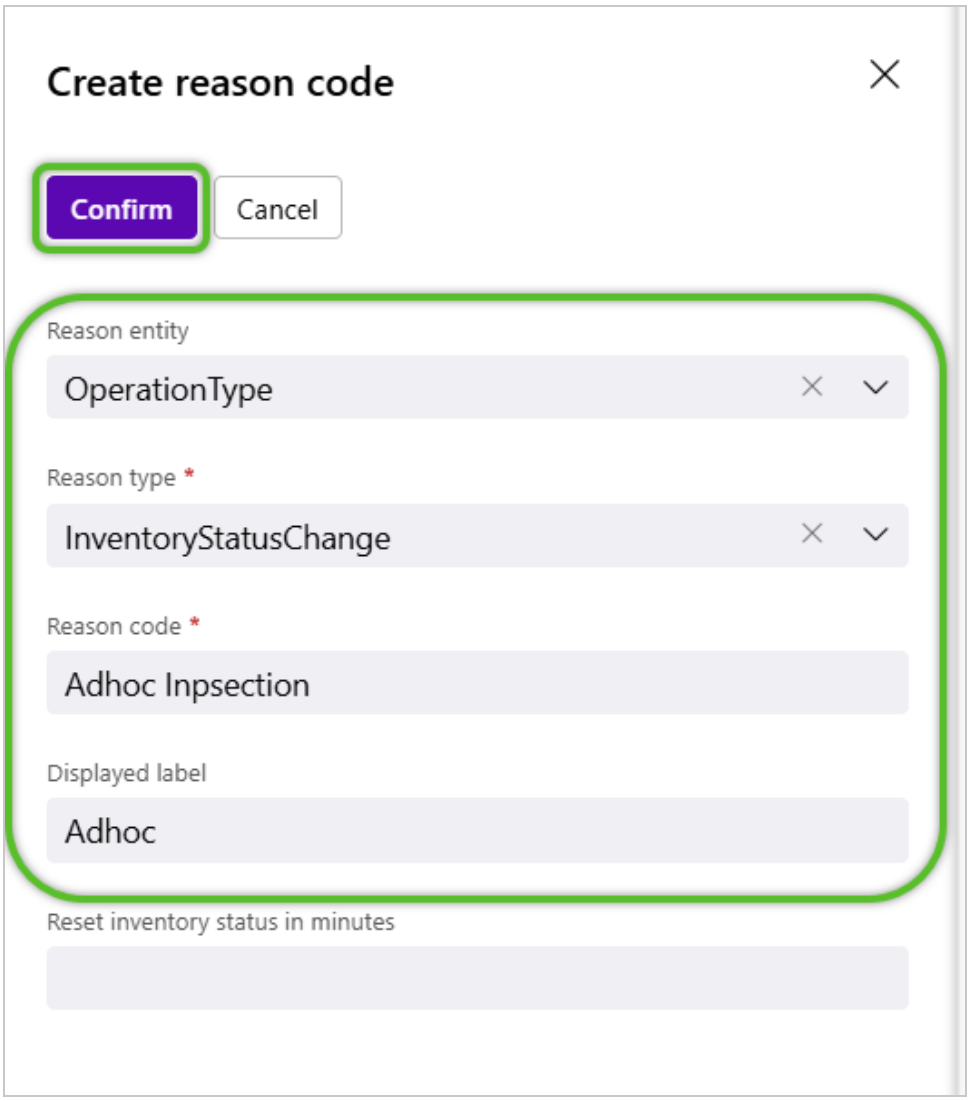
- **Operation Type**: Applies to typical Warehouse Operations, such as Inbound, Outbound, Manufacturing, Accessorial Charges, Cycle Counts, Adjustments, Moves, etc.
- **Load Container**: Applies specifically to Load Containers.
- **Invoice Type**: Applies to 3PL Billing and Invoices.

3. Select the **Reason type** based on the selected **Reason entity** that applied to the new Reason Code.

4. Enter the new code's name in the **Reason code** field and a shortened name in **Displayed label**.

5. Enter the optional **Reset inventory status in minutes** if desired, then click the **Confirm** button to save the details.

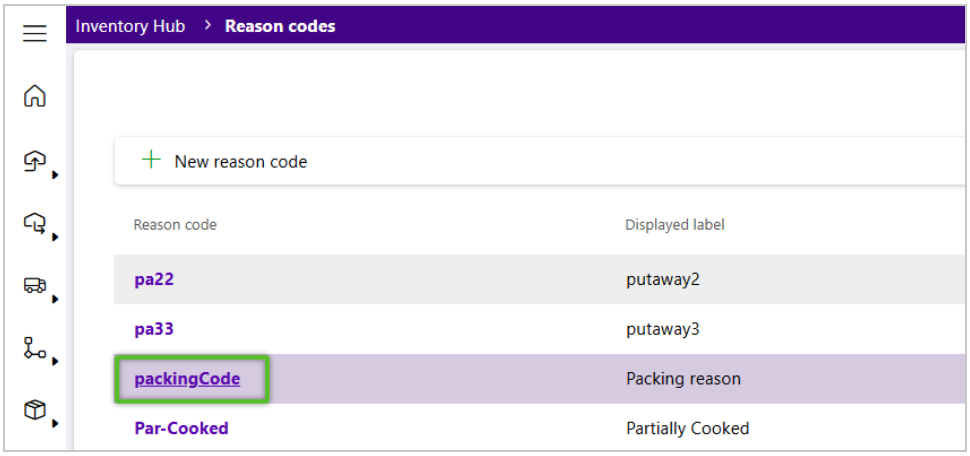
The new Reason Code will be available for immediate use.



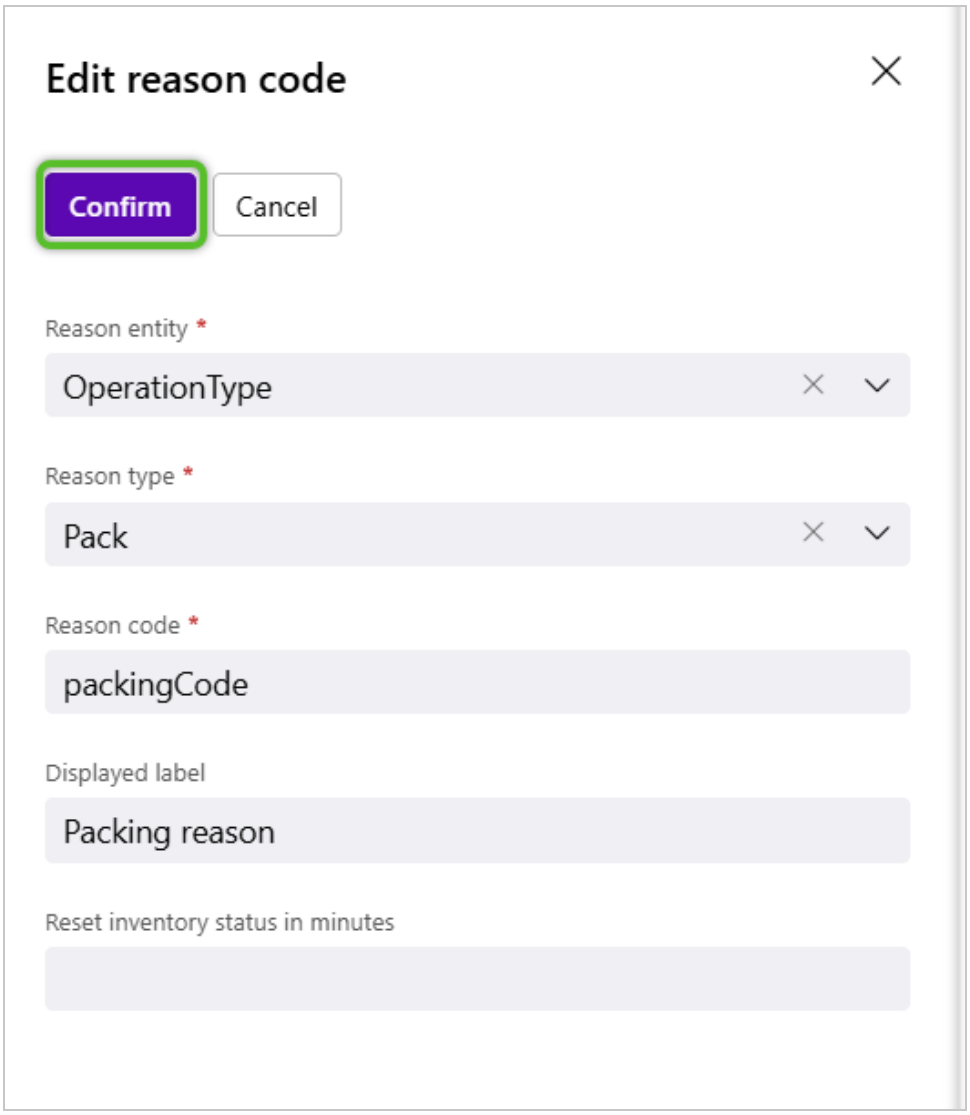
Edit Reason Codes

1. Locate the Reason Code, then click into it's **Reason code** hyperlink.

Edit reason code flyout will open enabled for editing.



2. Make any necessary changes, then click the **Confirm** button to save the updates.

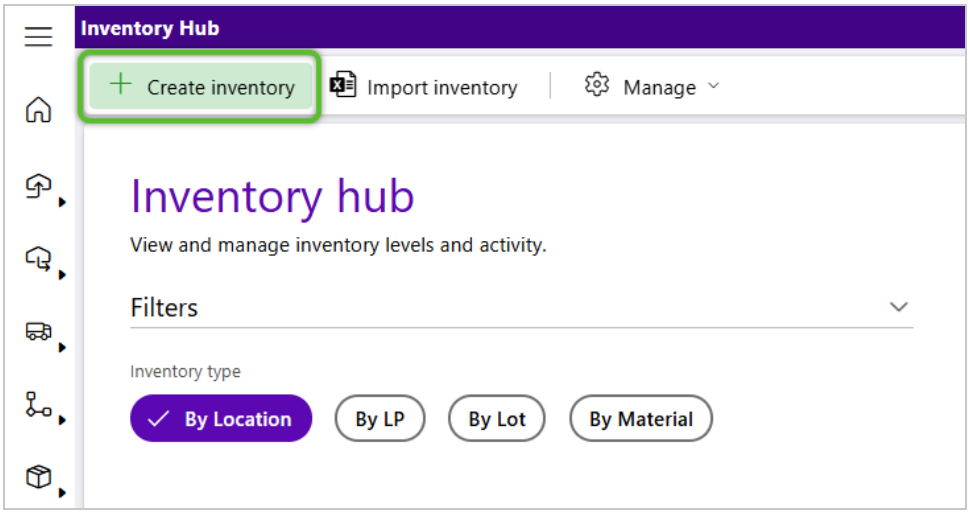


Create Inventory

Inventory is created at the Owner, Project, and Warehouse level and describes the specific details of the Inventory in that Warehouse. Inventory can also be **imported**.

Open the Inventory Hub

1. From the **Inventory Hub**, click the **+ Create Inventory** option in the top toolbar.



Step 2. Enter Inventory Details

2. In the **Create Inventory** window, select the required **Owner** and an affiliated **Project**, if they are not already set.

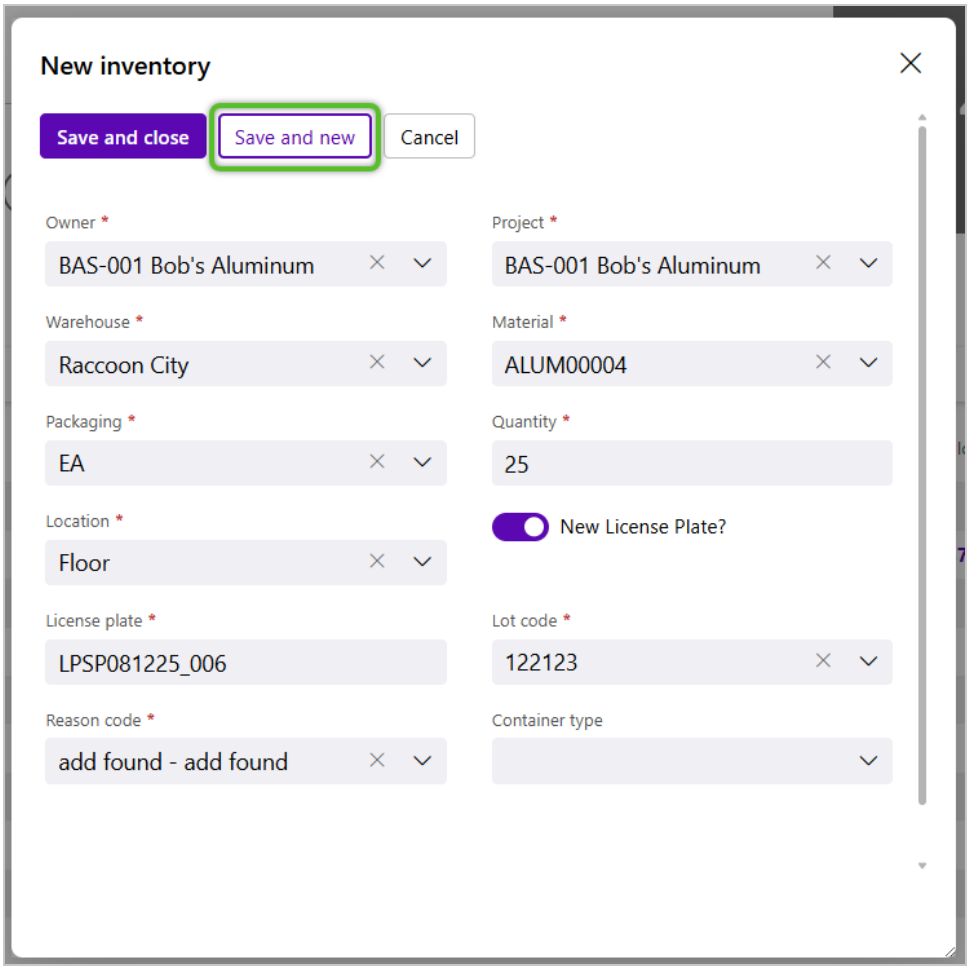
3. Select a required **Warehouse**, then tab to select the Inventory **Material** to be added, if they are not already set.

4. Select the required **Packaging** and enter the **Quantity** of the Inventory.

5. Select a **Location** and use the toggle indicating whether or not the new Inventory will require a **New License Plate**.

6. Enter or select a **License Plate** number for the new Inventory, then select a **Reason Code** for adding the new Inventory to the warehouse.

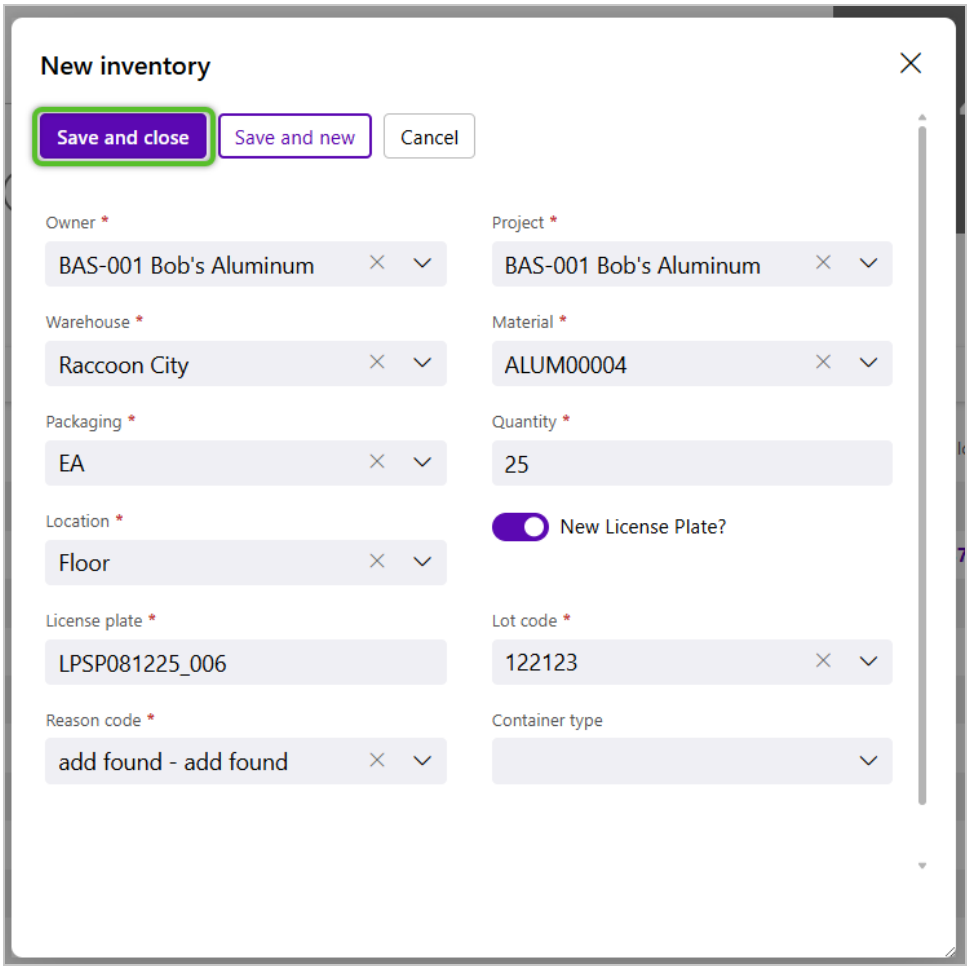
7. To continue adding new Inventory to the Warehouse, click the **Confirm and New** button in the top of the **Create Inventory** window.



Step 3. Save the New Inventory

8. Once all Inventory information has been set, if no more Inventory needs to be added, click the **Confirm and Close** button in the top left corner of the **Create Inventory** window.

The new Inventory will now be available for use in the specified warehouse.



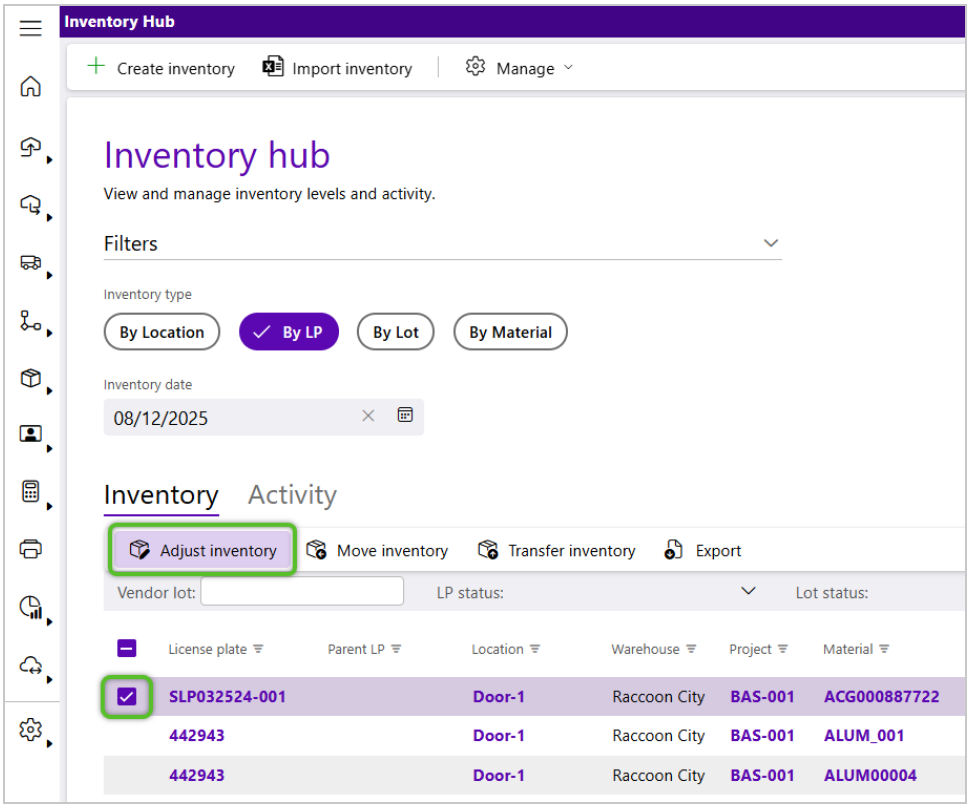
Adjust Inventory

All **Inventory Adjustments** require a Reason Code.

Prerequisites

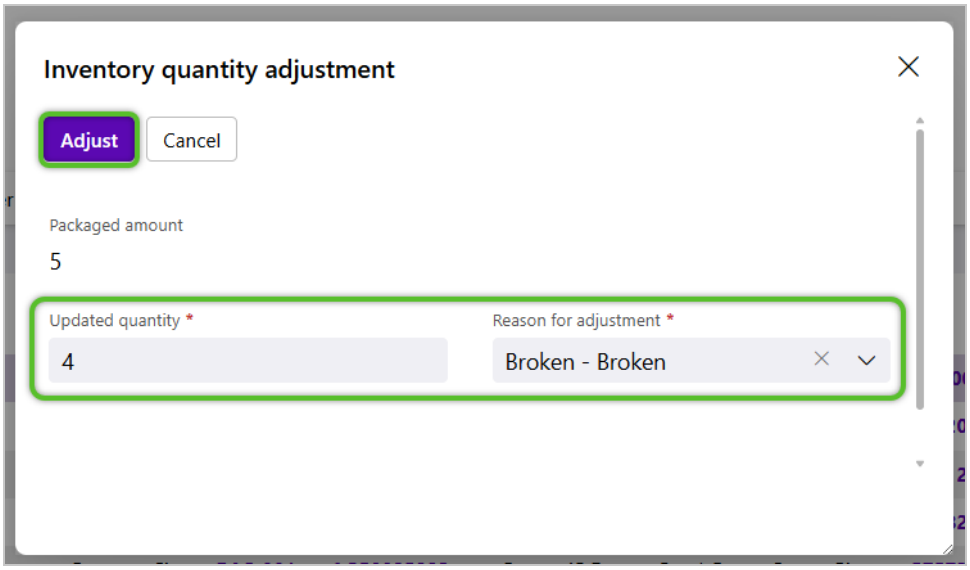
- An Adjust Type Reason Code

1. From the **Inventory** tab, locate the Inventory to be Adjusted, check the box to the left, then click **Adjust Inventory** in the toolbar.



2. In the **Adjust Inventory** window, enter the **Updated Packaged Amount** number and select a **Reason Code**.

3. Click the **Adjust** button to complete the inventory adjustment.



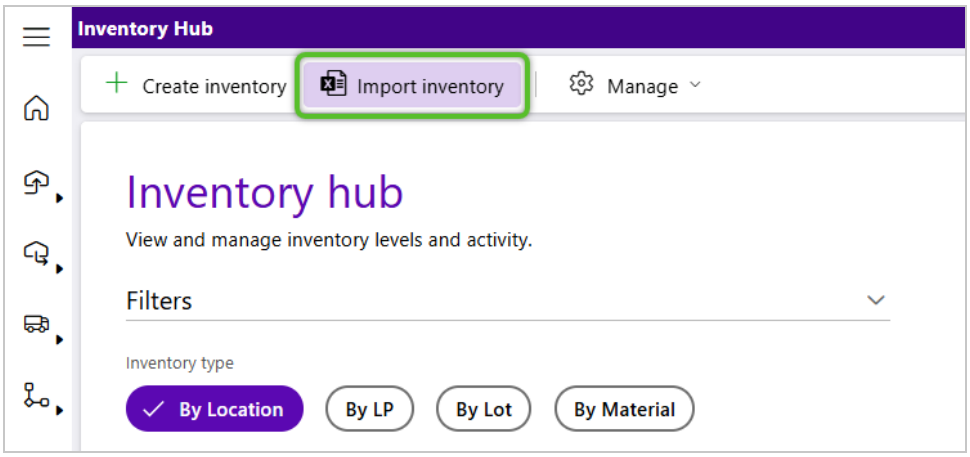
Import Inventory

Imported Inventory will appear alongside other Inventory for review and management.

Please Note

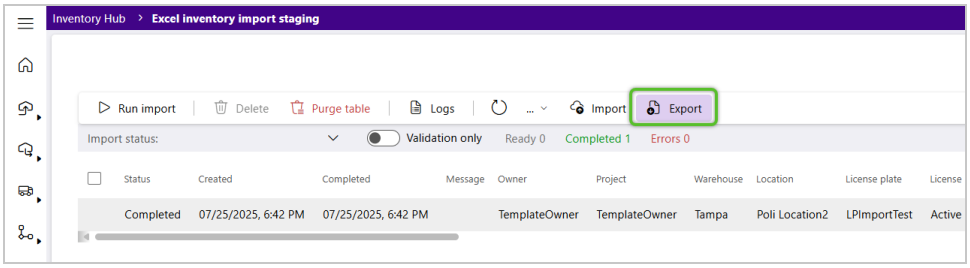
- For the most comprehensive import, we recommend downloading the latest export file with up-to-date features and fields.
- The import process is intended for creating new records. Enter as many details as possible when importing, as attempting to update existing records will result in an error.
- All 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 **Inventory Hub**, click the **Import Inventory** option in the top toolbar.



2. Click the **Export** option at the top of the **Inventory Import** page.

The import Inventory template file will be downloaded to the user's default download location.



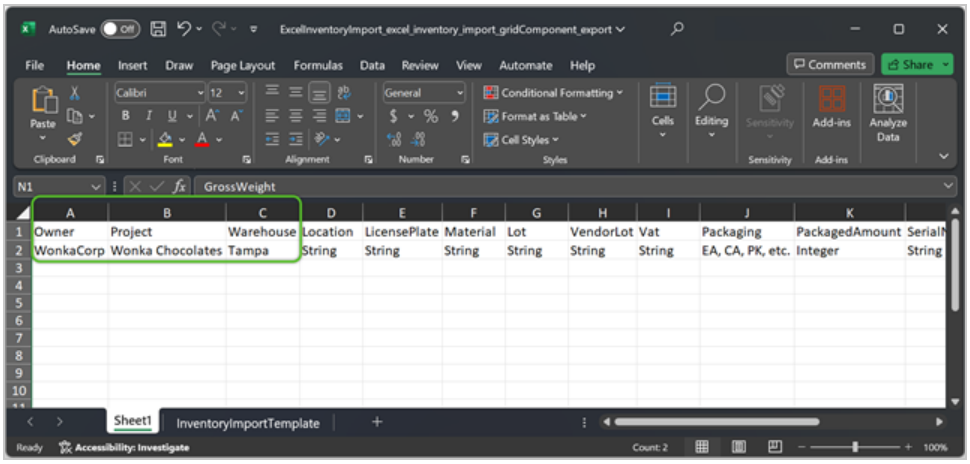
3. Locate the file named '**ExcelInventoryImport_excel_inventory_import_gridComponent_export**' and double click on it to open it.



Important

While the name of the file can be changed, do not make changes to the name of any column in the import file. This will cause the automated import process to fail.

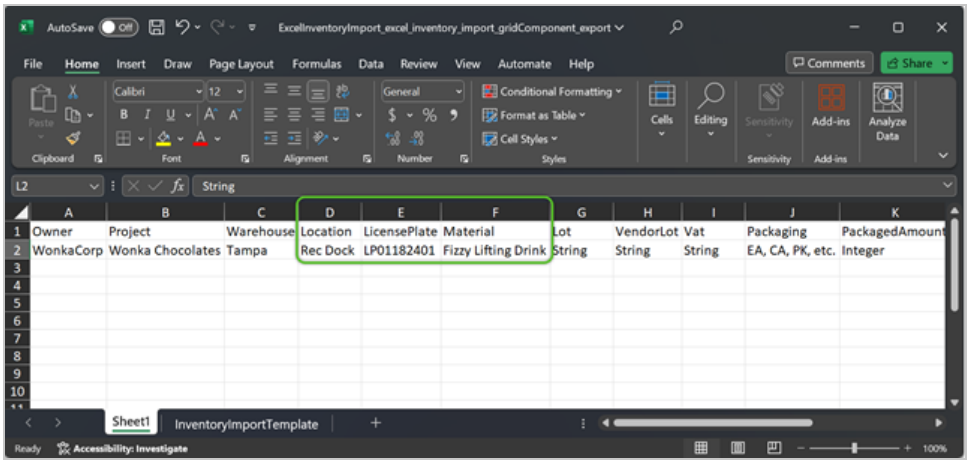
4. In required columns A, B, and C, enter the Inventory **Owner**, **Project**, and **Warehouse**.



Important

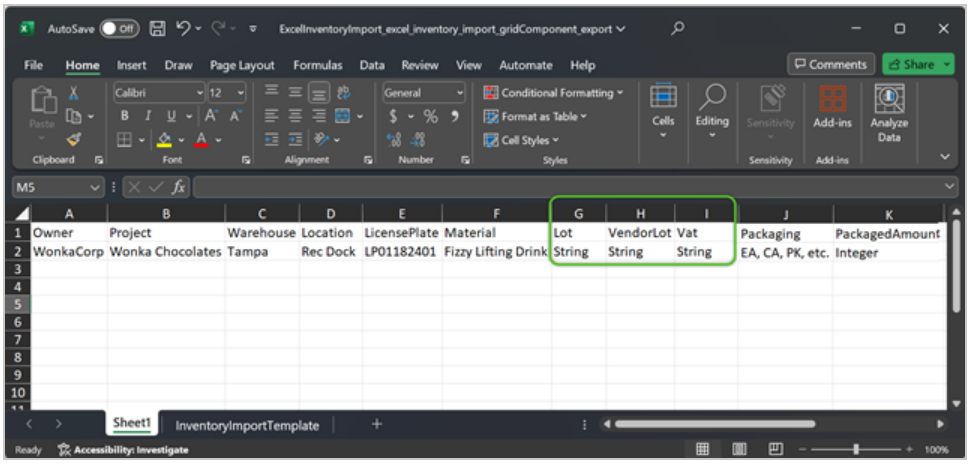
When adding data to the import file, all capitalization, spelling, and spacing--including spaces at the beginning or end that may not be easily seen, must match exactly with the **Warehouse**, **ProjectLookupCode**, and **MaterialLookupCode** fields in Footprintor an error will occur when importing.

5. In required columns D, E, and F, enter the **Location**, **LicensePlate**, and **Material**.

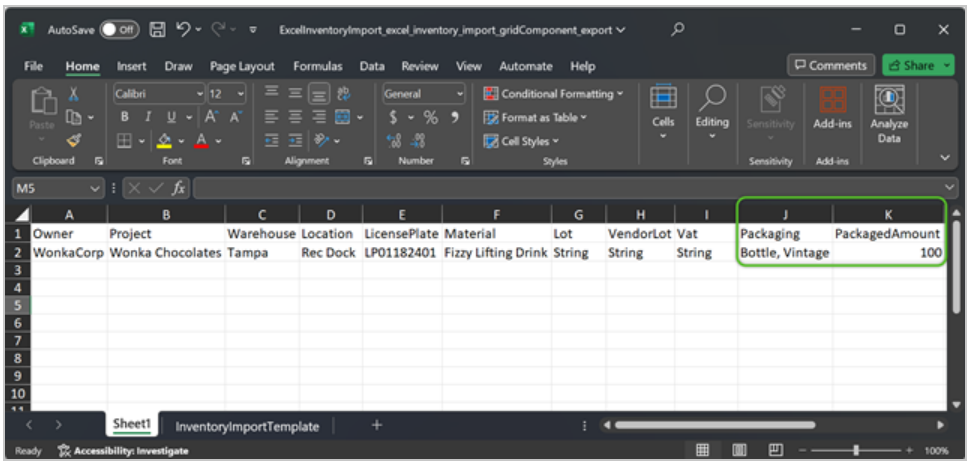


6. When possible, enter details in optional columns G, H, and I, keeping mind that the Import process is not intended for future data updates.

If these details are not going to be imported, be sure to delete the 'String' value from these fields before importing.

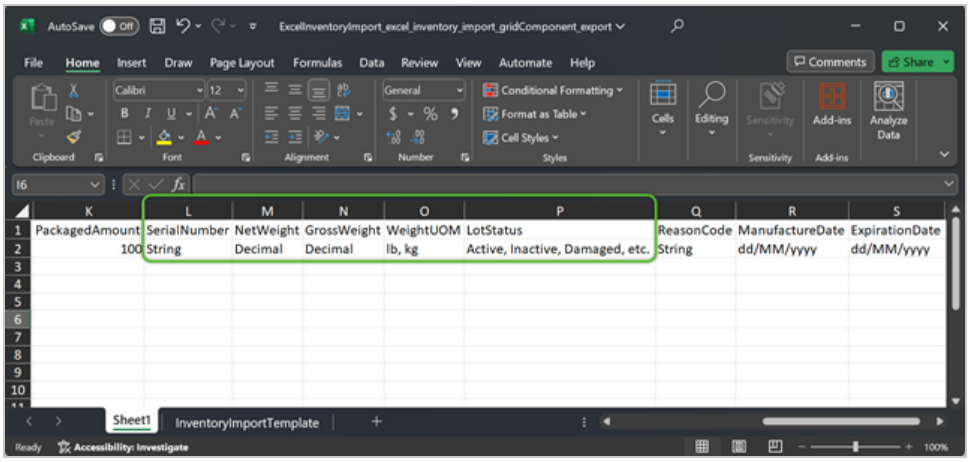


7. In required columns J and K, enter the inventory **Packaging** and **PackagedAmount**.

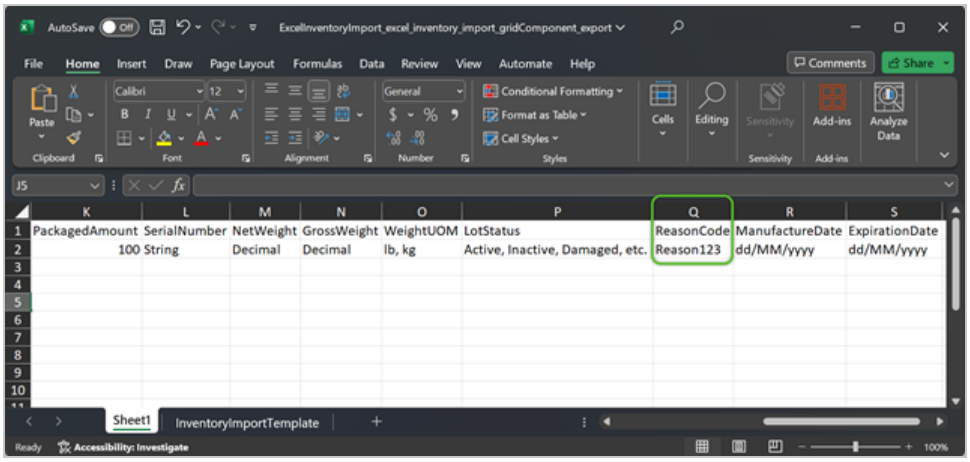


8. When possible, enter details in optional columns L, M, N, O, and P, keeping mind that the Import process is not intended for future data updates.

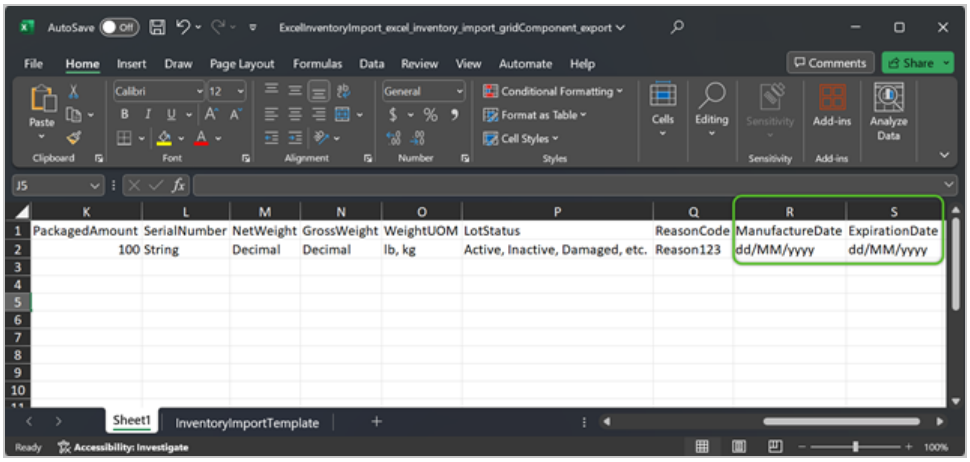
If these details are not going to be imported, be sure to delete the pre-existing values before importing.



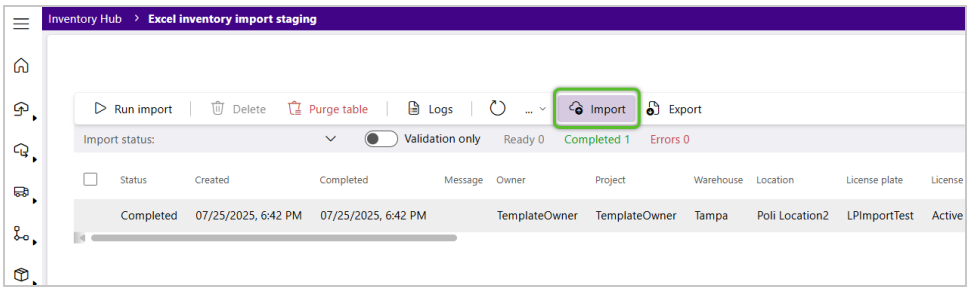
9. In required column Q, enter the **ReasonCode**.



10. When possible, enter the optional details in the remaining optional columns, keeping mind that the Import process is not intended for future data updates.

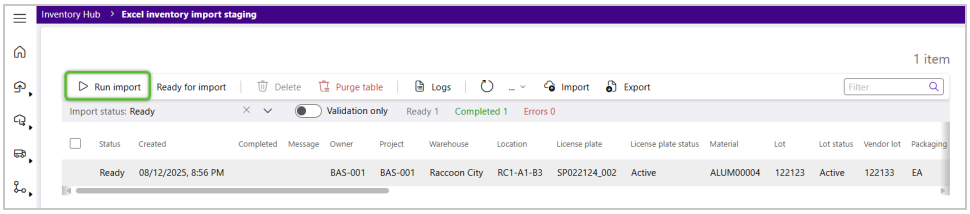


11. Save and close the spreadsheet, then click **Import** in the toolbar to select the file for upload.

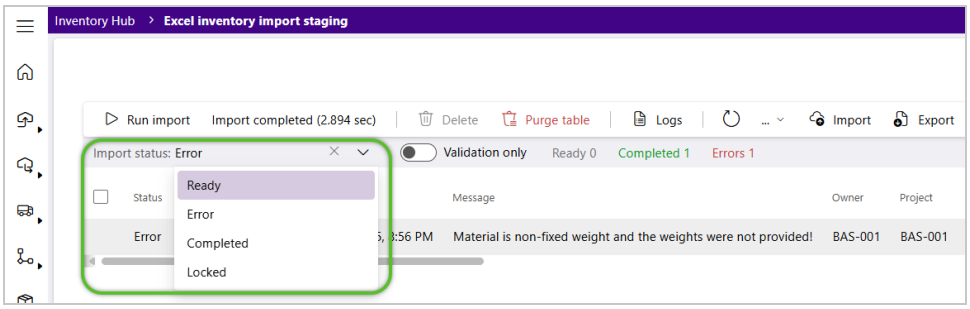


The Inventory details will display with a **Status** of **Ready**.

12. Click the **Run import** button to submit data.



13. Once the import data is submitted it can be viewed as either completed or reviewed for errors by switching the Import Status filter. If there are any errors correct as directed on the import template file and resubmit.

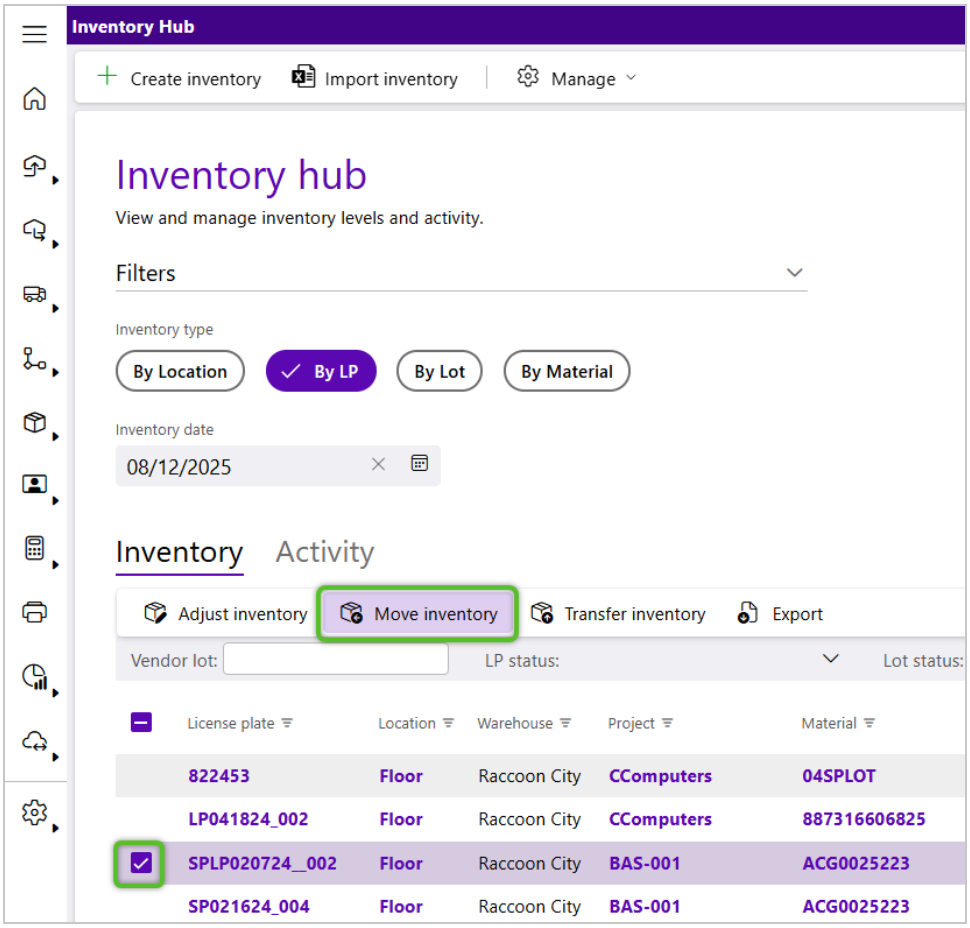


The newly imported **Inventory** will now display alongside other inventory in the **Inventory Hub**.

Move Inventory

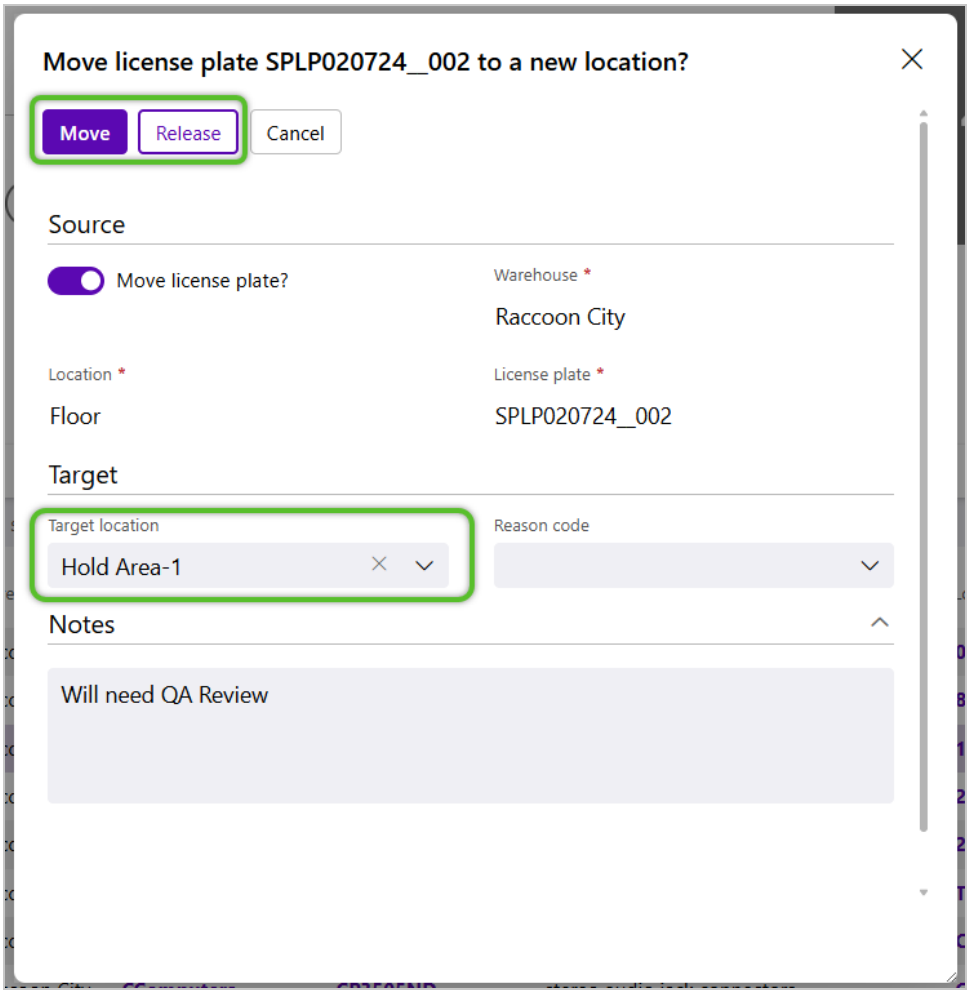
Inventory Moves are orders to move Materials from one or more License Plates to another Location.

1. From the **Inventory** tab, locate the Inventory to be moved, check the box to the left, then click **Move Inventory** in the toolbar.



2. In the **Move Inventory** window, select the **Target Location**, enter any **Notes**, and select an optional **Reason Code**.

3. Click either the **Release** button to send the move be completed on Footprint Mobile as a Directed Move or **Move** to complete the inventory move.



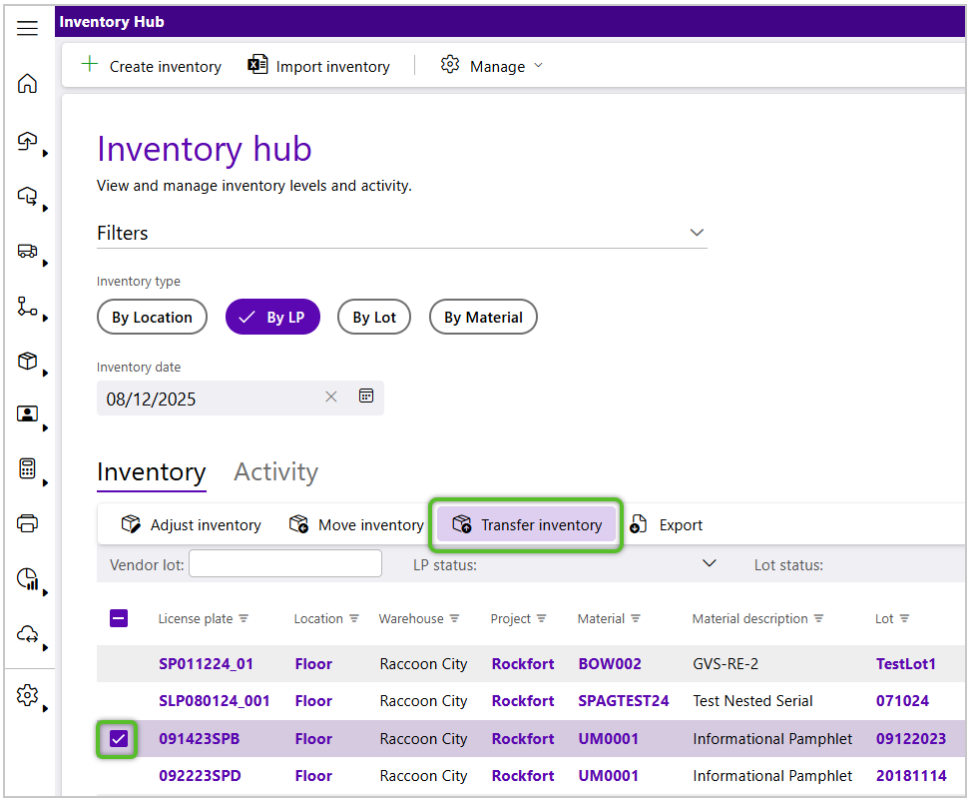
Transfer Inventory

Inventory can be transferred from one Owner and Project to another using the **Transfer Inventory** feature. While the Project and/or Owner will change, the Location will remain unchanged.

Note

Any Inbound or Outbound Orders involving Inventory to be used during an Inventory Transfer must be closed before performing the Transfer.

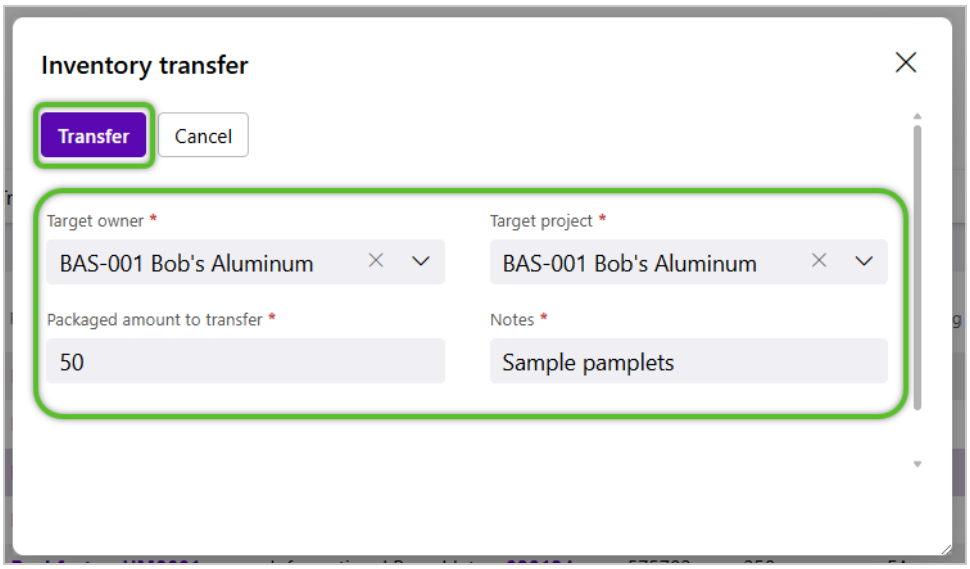
1. From the **Inventory** tab, locate the Inventory to be Transferred, check the box to the left, then click **Transfer Inventory** in the toolbar.



2. In the **Transfer Inventory** window, select the **Target Owner** and **Target Project**.

3. Enter the **Packaged Amount to Transfer**, along with any **Notes**.

4. Click the **Transfer** button to complete the inventory transfer.



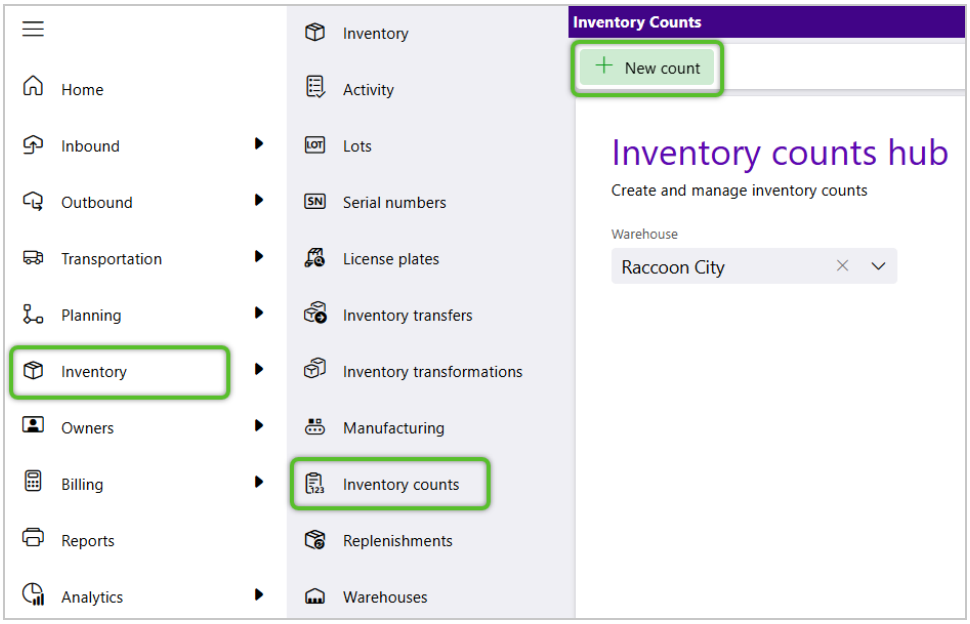
Create an Inventory Count

There are a wide range of options that can beset up for each **Inventory Count**, limiting them to certain Locations, Storage Categories, Materials, Owners, Lots, and so on. Counts can be setup to occur only once at a specified time, or recur over a set schedule.

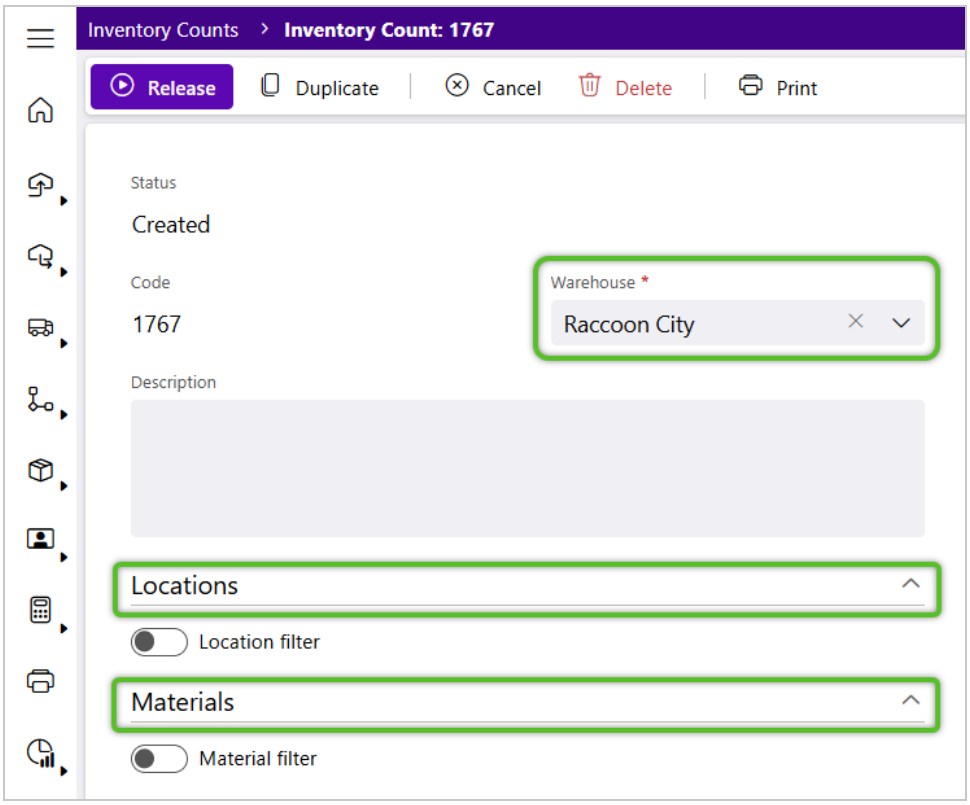
1. Click **Inventory** in the left navigation menu and select **Inventory Counts**.

The **Inventory Counts Hub** will display.

2. Click **+ Create Inventory Count** in the top toolbar.



3. In the **Header** section, select a required **Warehouse**.



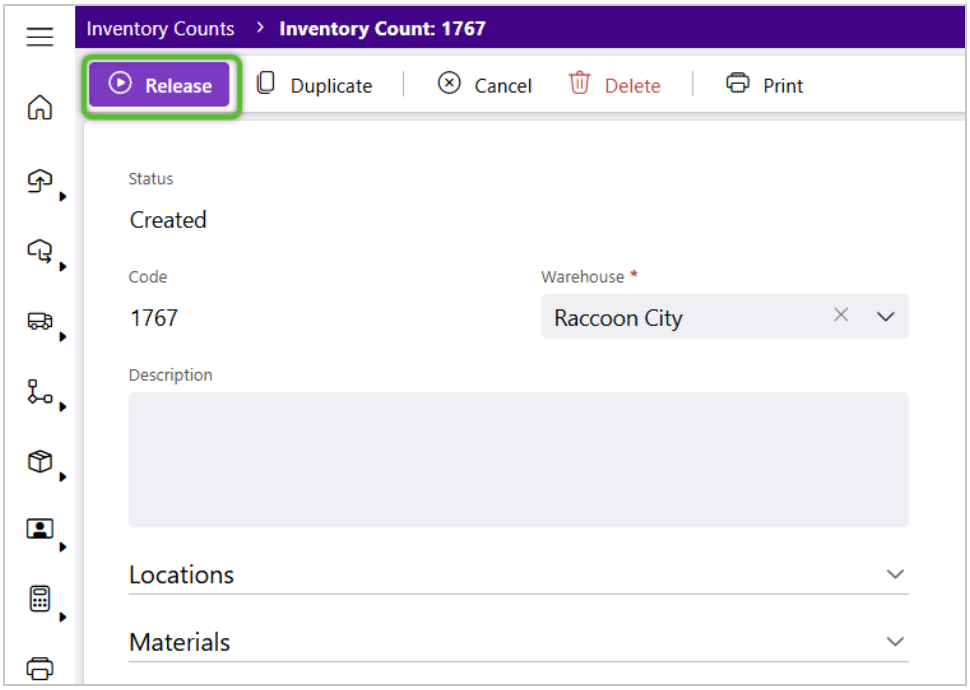
If needed, select to filter the Count by **Location** or **Materials**.

There are many different options within these sections when their toggle is switched on. You can choose to set just one filter, or use multiple filters in tandem with one another.

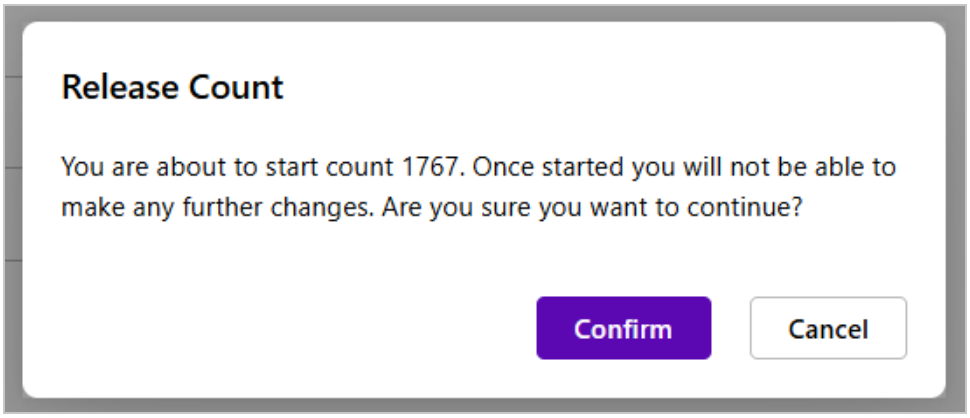
4. To Release the Inventory Count now, enabling the Count Task to be performed on a mobile device, click **Release Count** in the top toolbar.

Note

If the Count Task is not ready to be enabled on mobile devices yet, you can wait to Release the Inventory Count at a later time.



5. Review the details are correct in the confirmation window, then click the **Confirm** button.



6. Click the **OK** button to close the **Release Count** window.

The Count will be released, allowing the Count Task to be performed on a mobile device.

The new Inventory Count will appear with the **Created** status in the Inventory Counts Hub, making it available to be performed on a Footprint mobile device in the Warehouse.

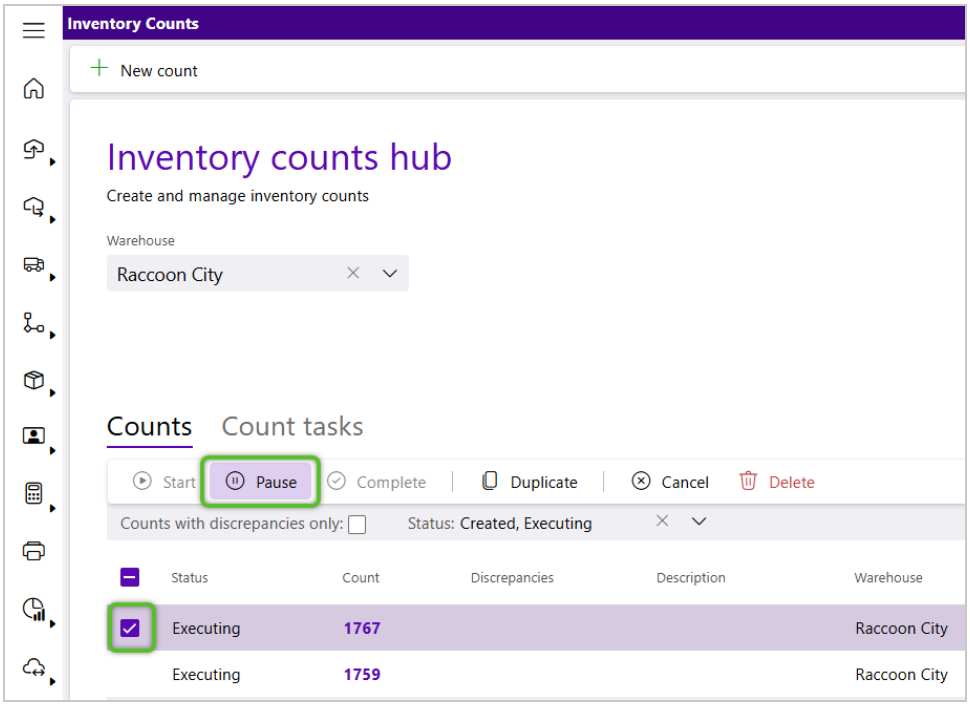
Pause an Inventory Count

When a released Inventory Count needs to be put on hold instead of being performed right away, you can Pause the Count until you are ready to re-release it.

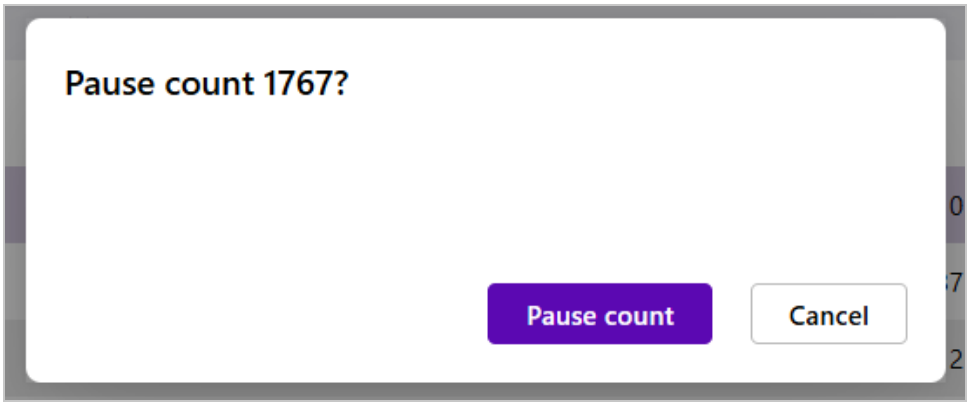
1. Click **Inventory** in the left navigation menu and select **Inventory Counts**.

The **Inventory Counts Hub** will display.

2. Locate the Inventory Count to Pause, click the box to the left of it, then click **Pause** in the **Counts** tab toolbar.



3. Review the details are correct in the confirmation window, then click the **Pause count** button.



The Inventory Count will be paused, ensuring it cannot be performed until it is re-released.

Resolve Count Discrepancies

Discrepancies occur when a Count Task is performed and License Plate, Material, Lot, Vendor Lot, or Packaging information does not match what is in the system (this can only occur when the Physical Count has any of these set to **Blind** in the **Settings** tab). Discrepancies can only be Resolved once.

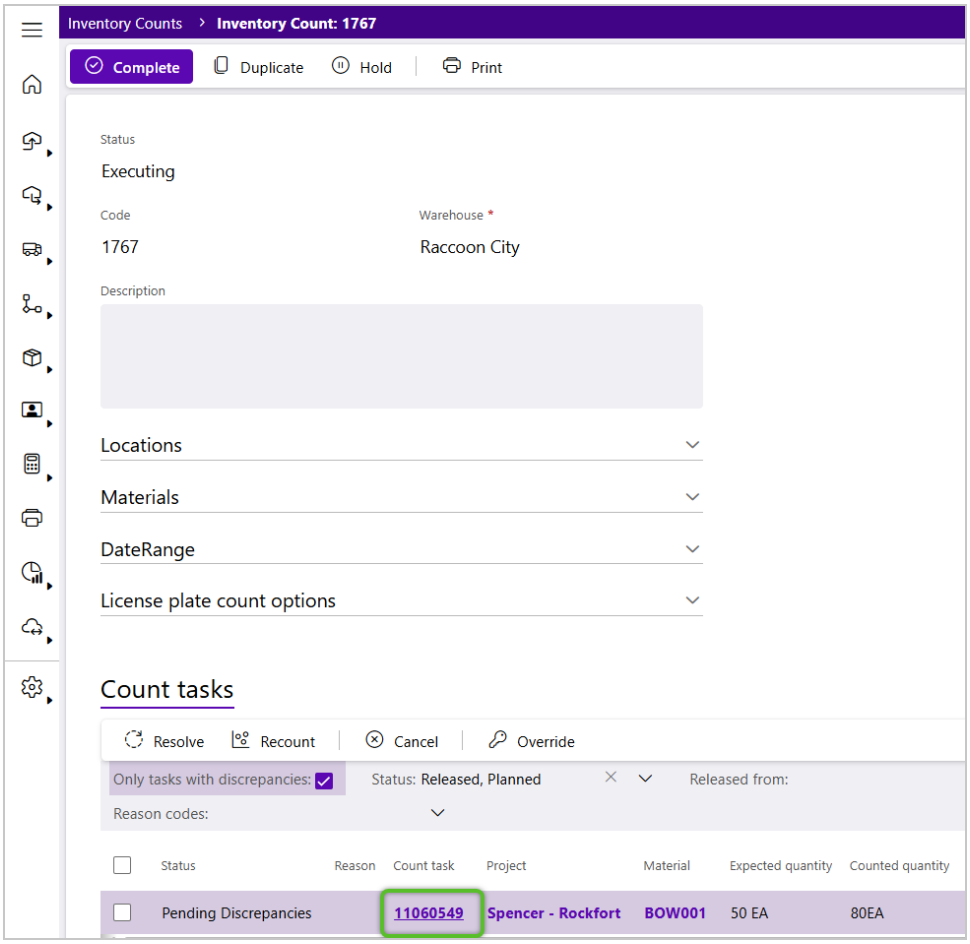
1. Click **Inventory** in the left navigation menu and select **Inventory Counts**.

The **Inventory Counts Hub** will display.

2. Locate the Inventory Count to be completed and click the **Count** number hyperlink to open it for review.

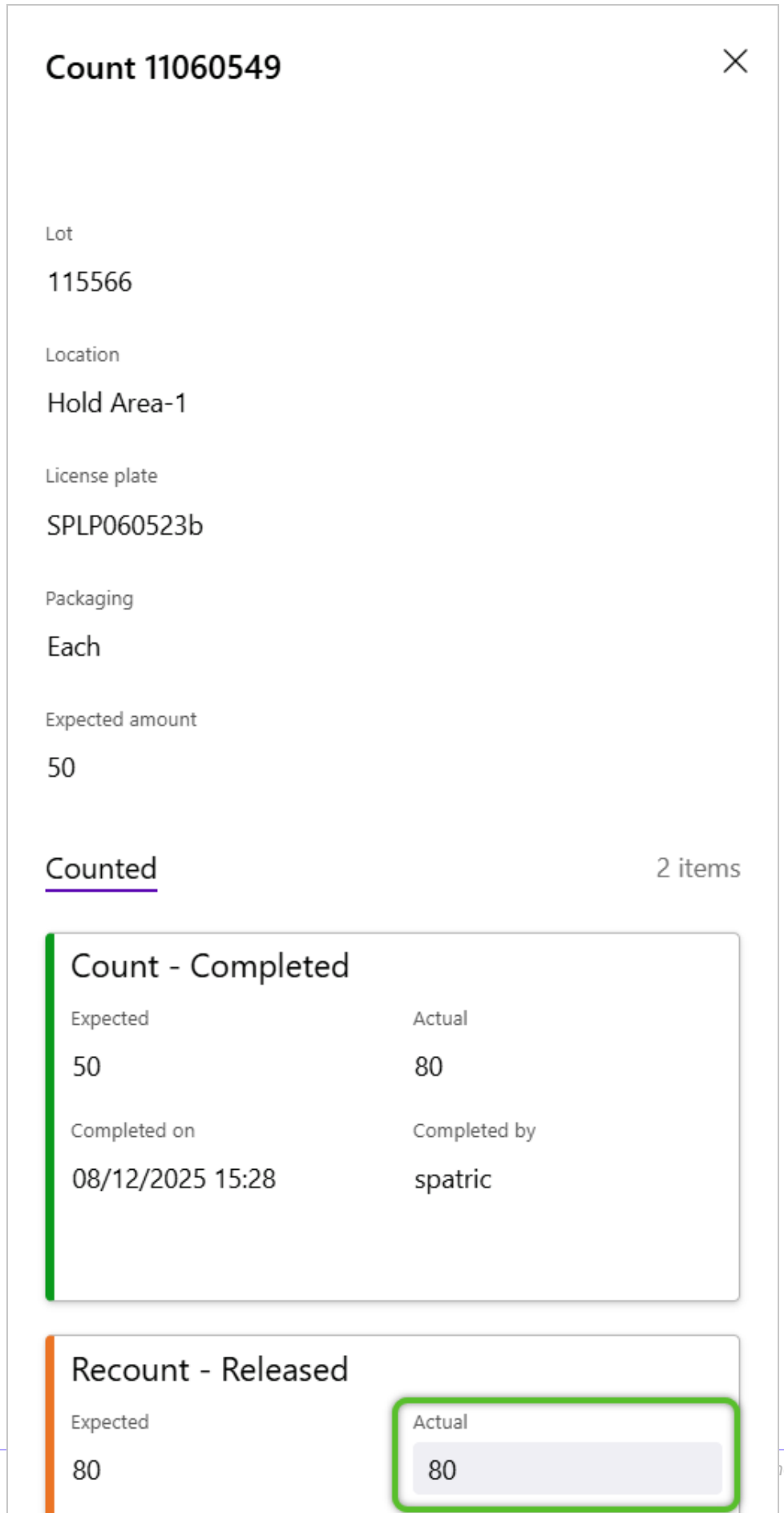
The Inventory Count will display, with **Count Tasks** listed at the bottom.

3. Locate the Inventory Count with **Pending Discrepancies** and click on the blue Count Task **ID** number.

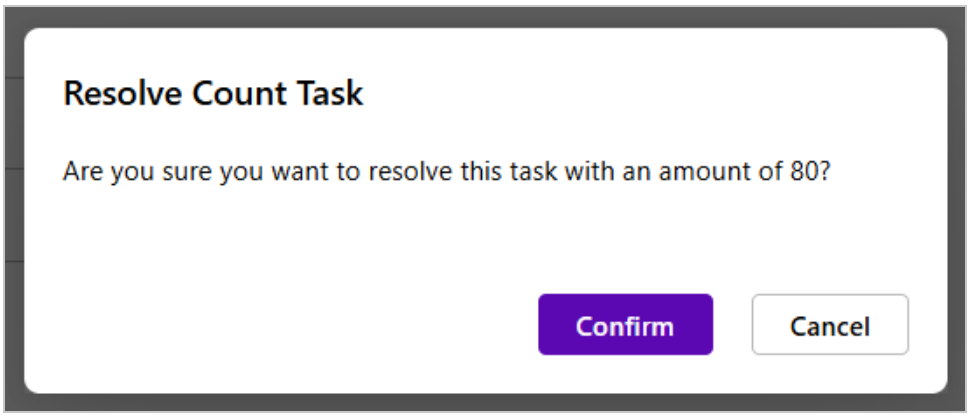


The Count details and discrepancies will open for review and resolution

3. Enter the **Actual** amount, then click the **Resolve** option


Count 11060549
Lot
115566
Location
Hold Area-1
License plate
SPLP060523b
Packaging
Each
Expected amount
50
Counted
2 items
Count - Completed
Expected
50
Actual
80
Completed on
08/12/2025 15:28
Completed by
spatric
Recount - Released
Expected
80
Actual
80

4. Review the details are correct in the **Resolve Count Task** window, then click the **Confirm** button.



5. Click the **OK** button to close the confirmation window.

The Count Task discrepancy status will update to **Recount - Completed** and the Inventory in the system will be updated accordingly.

Complete an Inventory Count

The final step in the Inventory Count process is to Complete the Inventory Count. This is where users can review the Count and Task details, order Recounts, and/or **Resolve Discrepancies**, and close out the Count.

1. Click **Inventory** in the left navigation menu and select **Inventory Counts**.

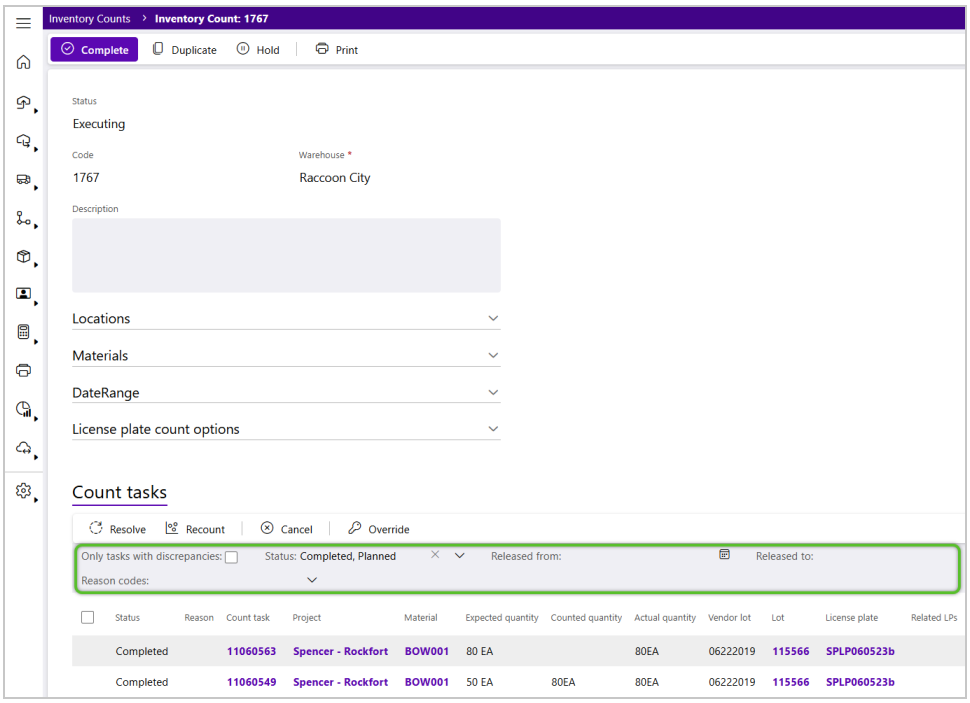
The **Inventory Counts Hub** will display.

2. Locate the Inventory Count to be completed and click the **Count** number hyperlink to open it for review.

The Inventory Count will display, with **Count Tasks** listed at the bottom.

3. In the **Count Tasks** tab at the bottom, review all Tasks relating to the Count.

If needed, filter the Tasks by Status, Released Dates, and/or whether or not you'd like to display only Tasks with Discrepancies.



4. Click on a blue Count Task **ID** number for further review.

The **Count** panel will open along the right side of the page.

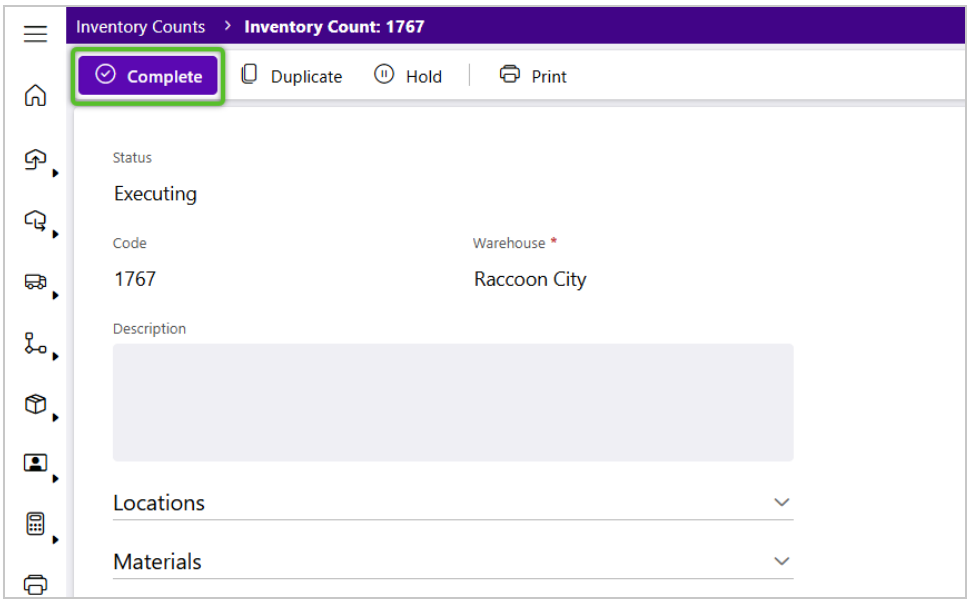
If there are any **Pending Discrepancies**, **Resolve** them from here now.

Once all Count Tasks have been completed and the Count has been reviewed, it is ready to be completed, permanently closing it out.

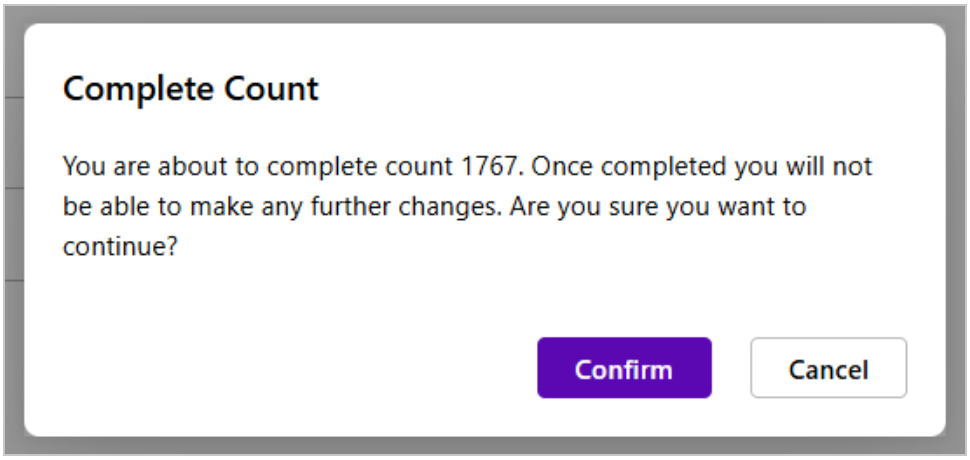
5. To complete an Inventory Count, click the **Complete** option at the top of the Count.

Note

Completing a Recurring Inventory Count will end it's schedule and stop it from creating new Count Tasks.



6. Review the details are correct in the **Complete Count** window, then click the **Confirm** button.



7. Click the **OK** button to close the confirmation window.

The Inventory Count will now only appear when filtering for Counts with the **Completed** status in the Inventory Counts Hub.

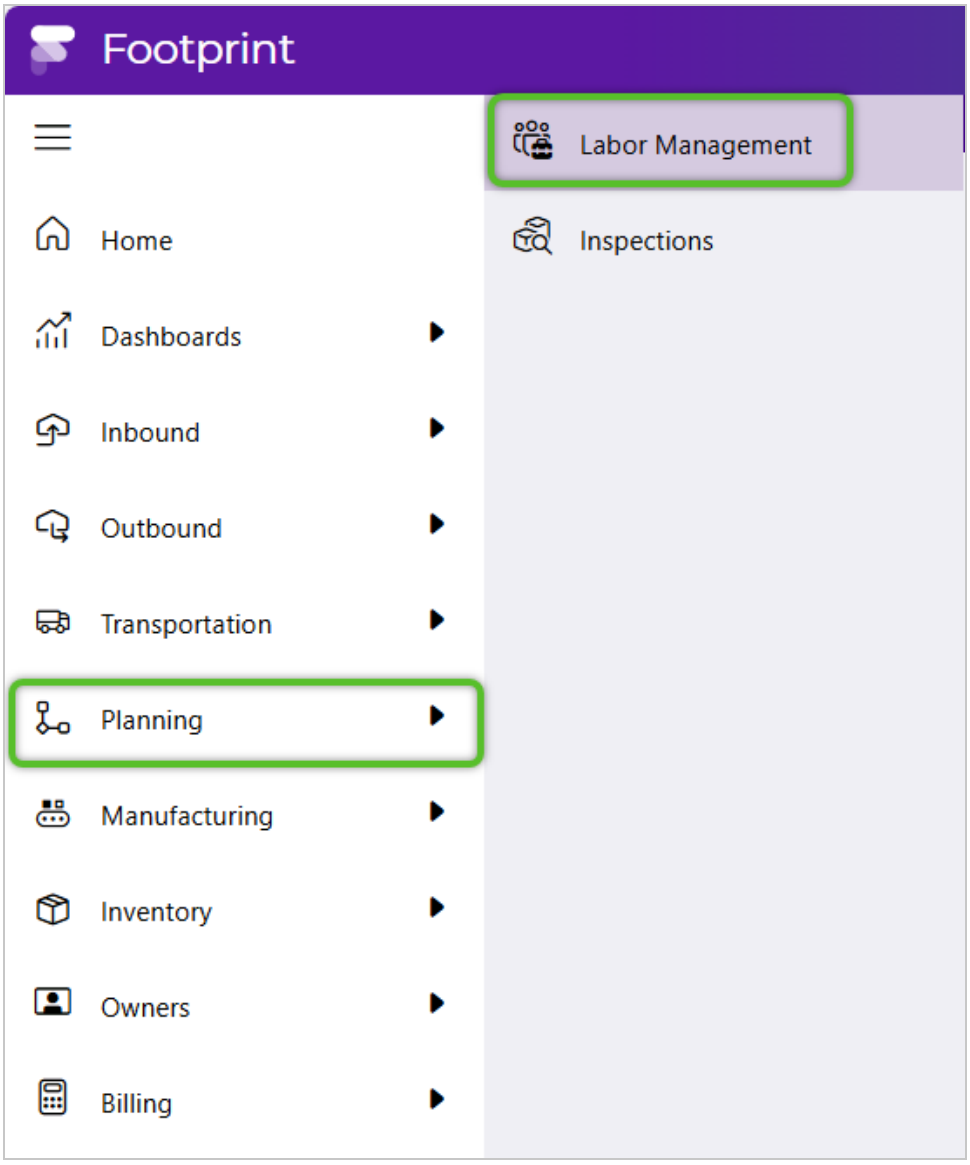
Labor Management Hub

The **Labor Management Hub** allows you to view and manage all **Tasks** in the system. **Work Classes** drive the Labor Management Hub, as properly configured Work Classes can greatly streamline the work being done in the warehouse and provide vital metrics. Work Classes allow for more control over the Tasks users can perform, the zones in which they can perform those tasks, and the tasks available to a given piece of equipment, to name a few examples.

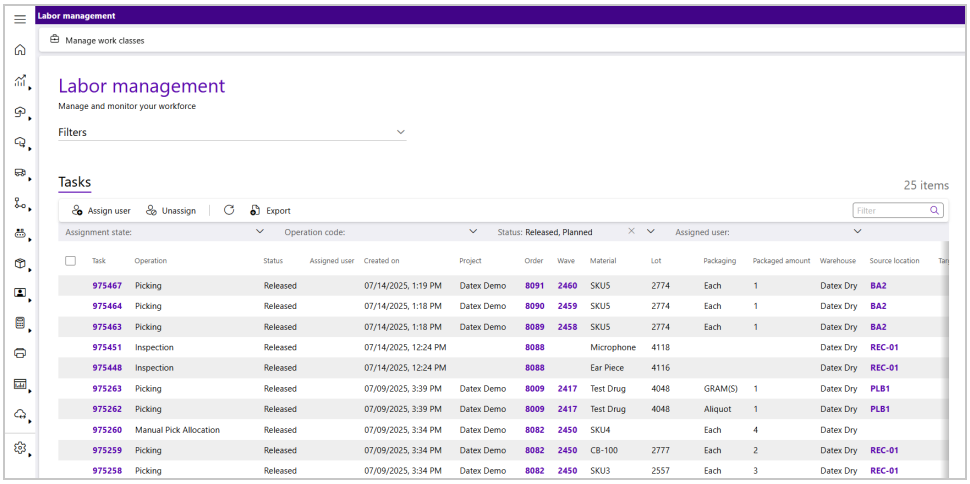
How to Manage Work Classes

Work Classes assigned to users in Footprint can be created, edited, and deleted from Manage Work Classes screen. Each Work Class can be associated with Equipment, Tasks, Operations and Users.

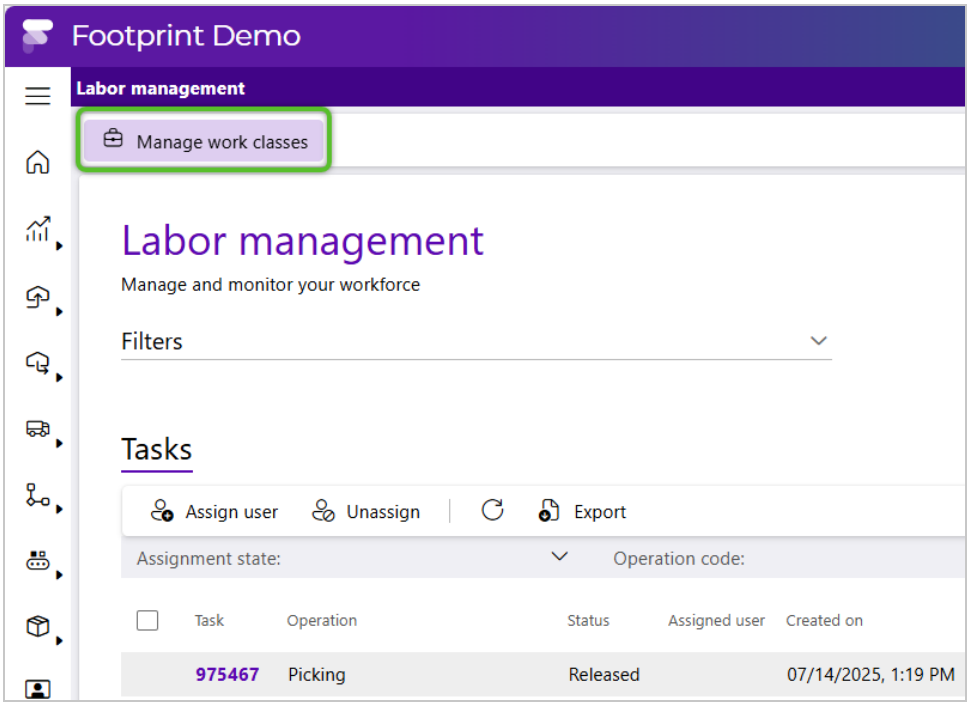
1. To create, edit, or delete a **Work Class**, click **Planning** in the left navigation menu, then click the **Labor Management** sub menu item.



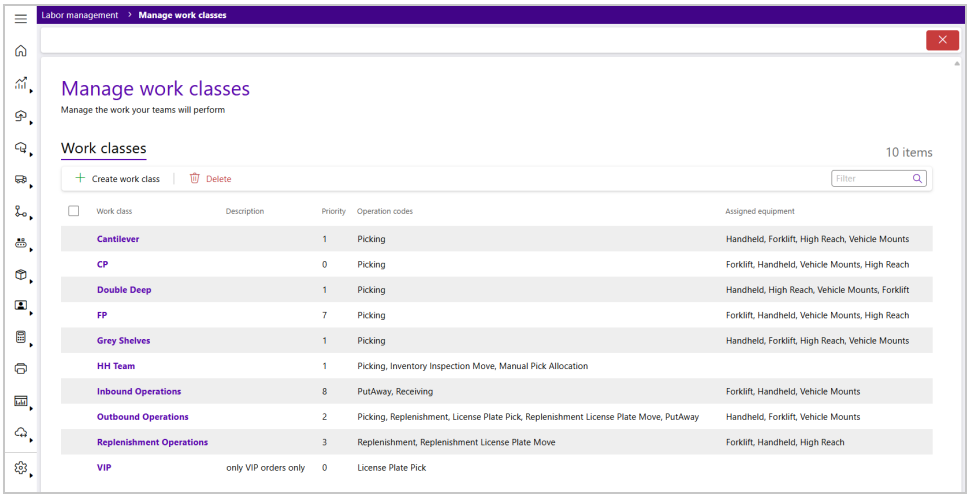
The **Labor Management Hub** will display



2. Click **Manage work classes** in the top menu.

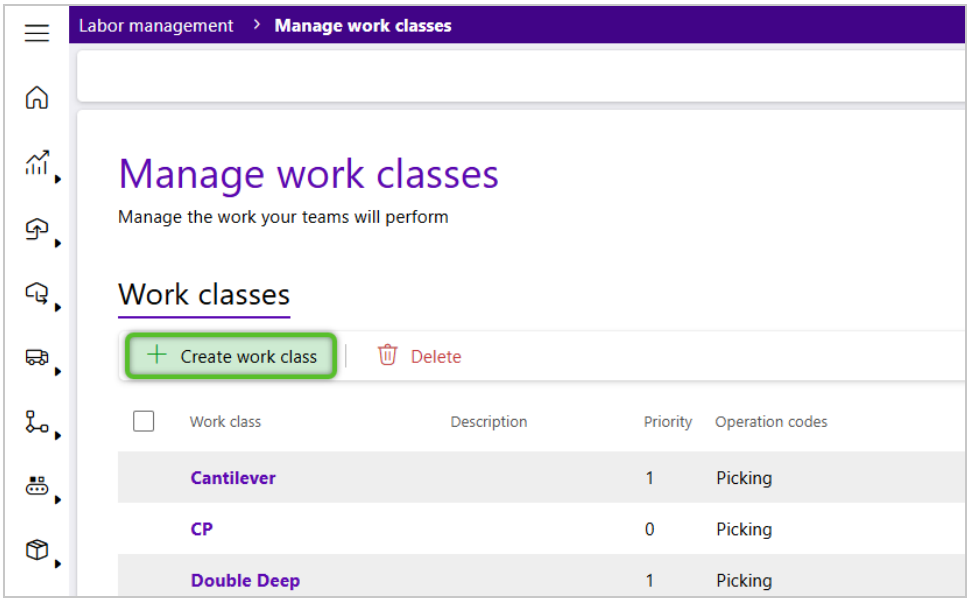


The **Manage work classes** screen will display.

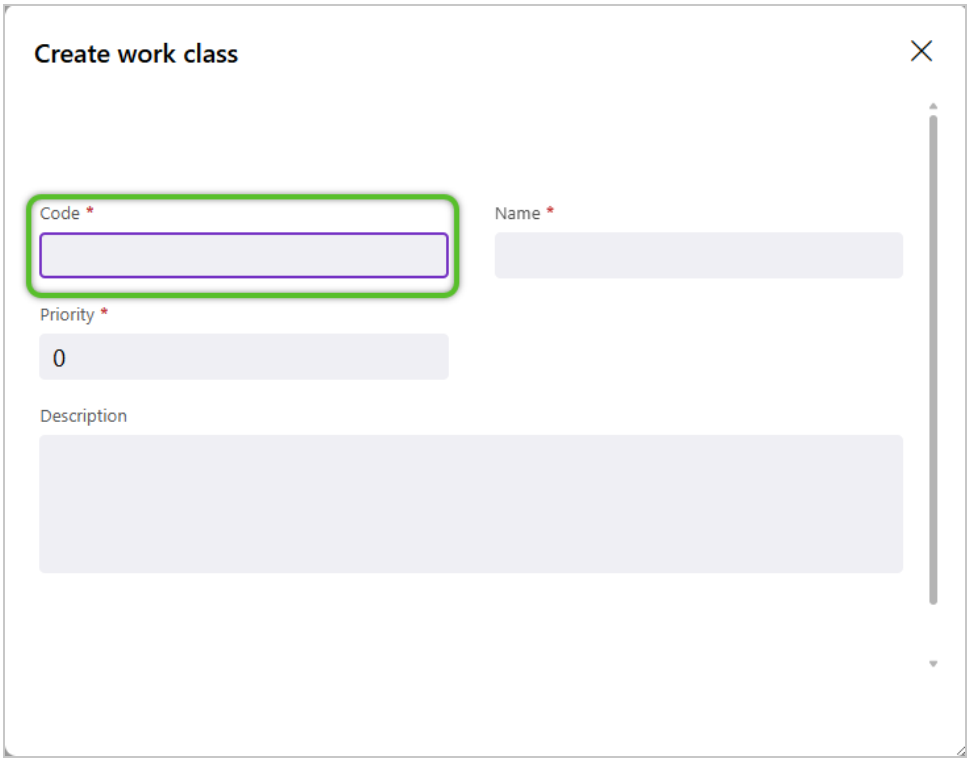


Create a Work Class

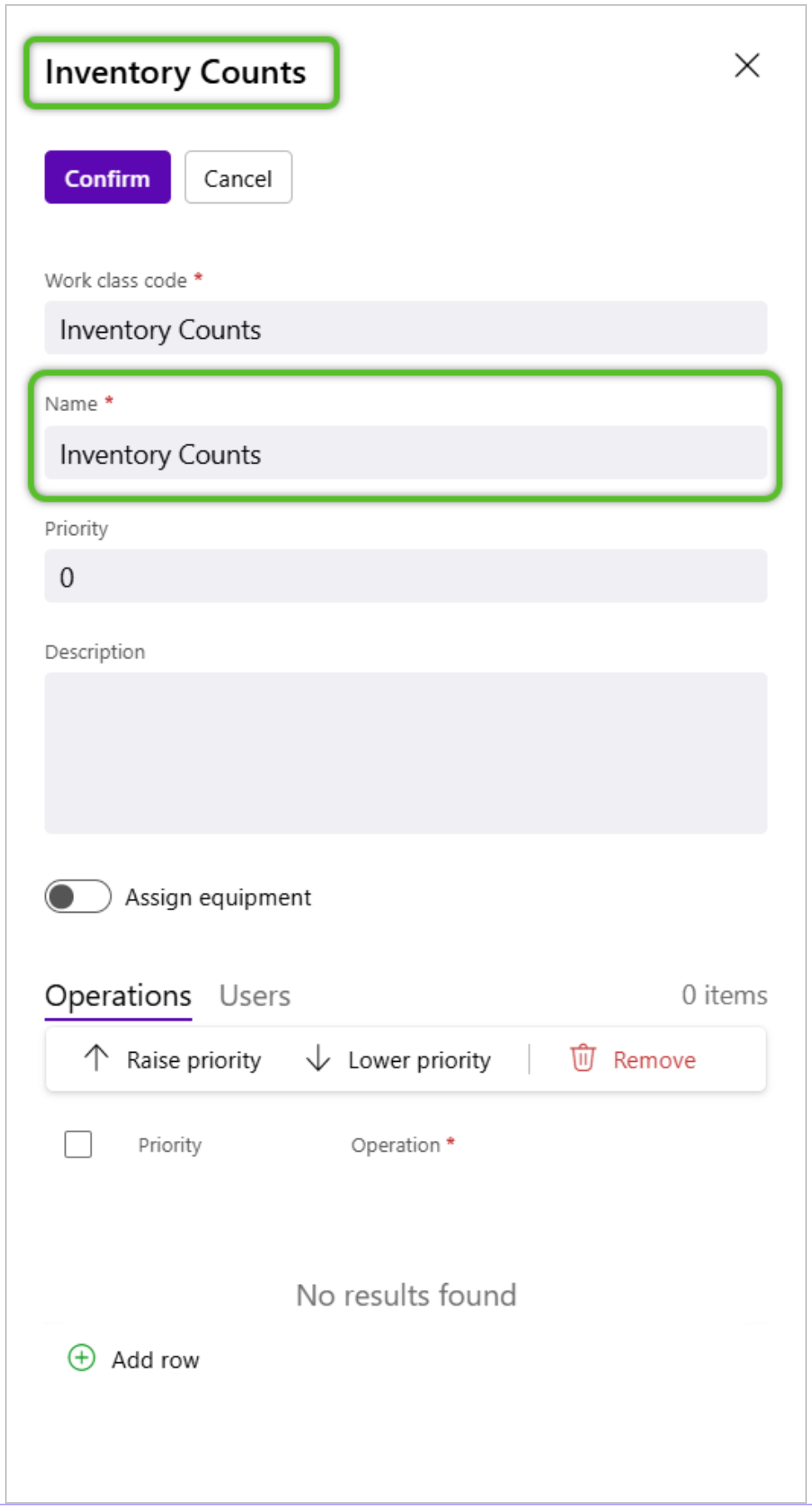
1. To create a new **Work Class**, click **+ Create work class**.



2. In the **Create work class** window, enter a required short lookup **Code**, then tab or click into the next field.

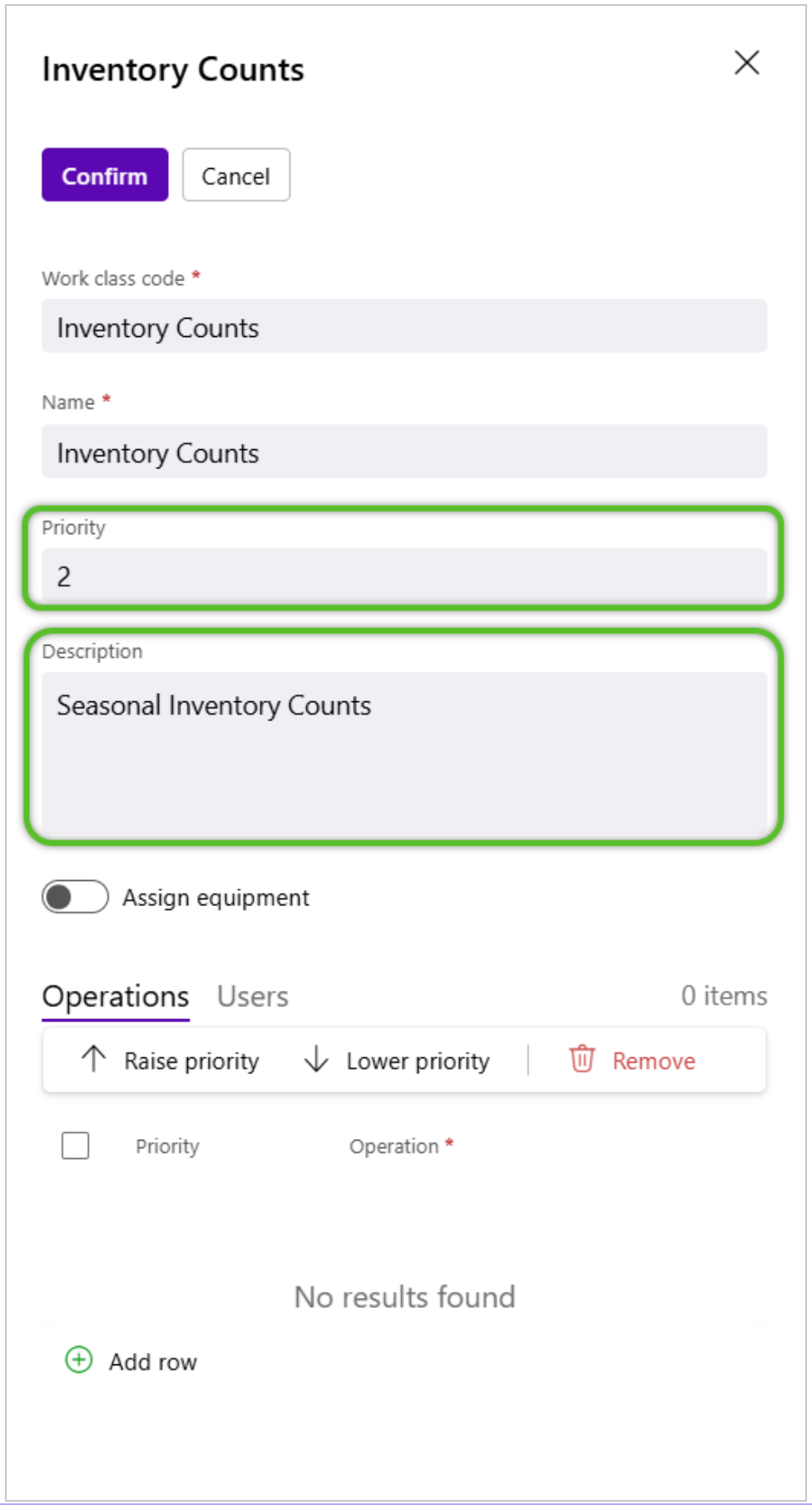


The **Work Class** will automatically be created and the window will switch to a flyout on the right side of the screen, allowing more details to be entered.

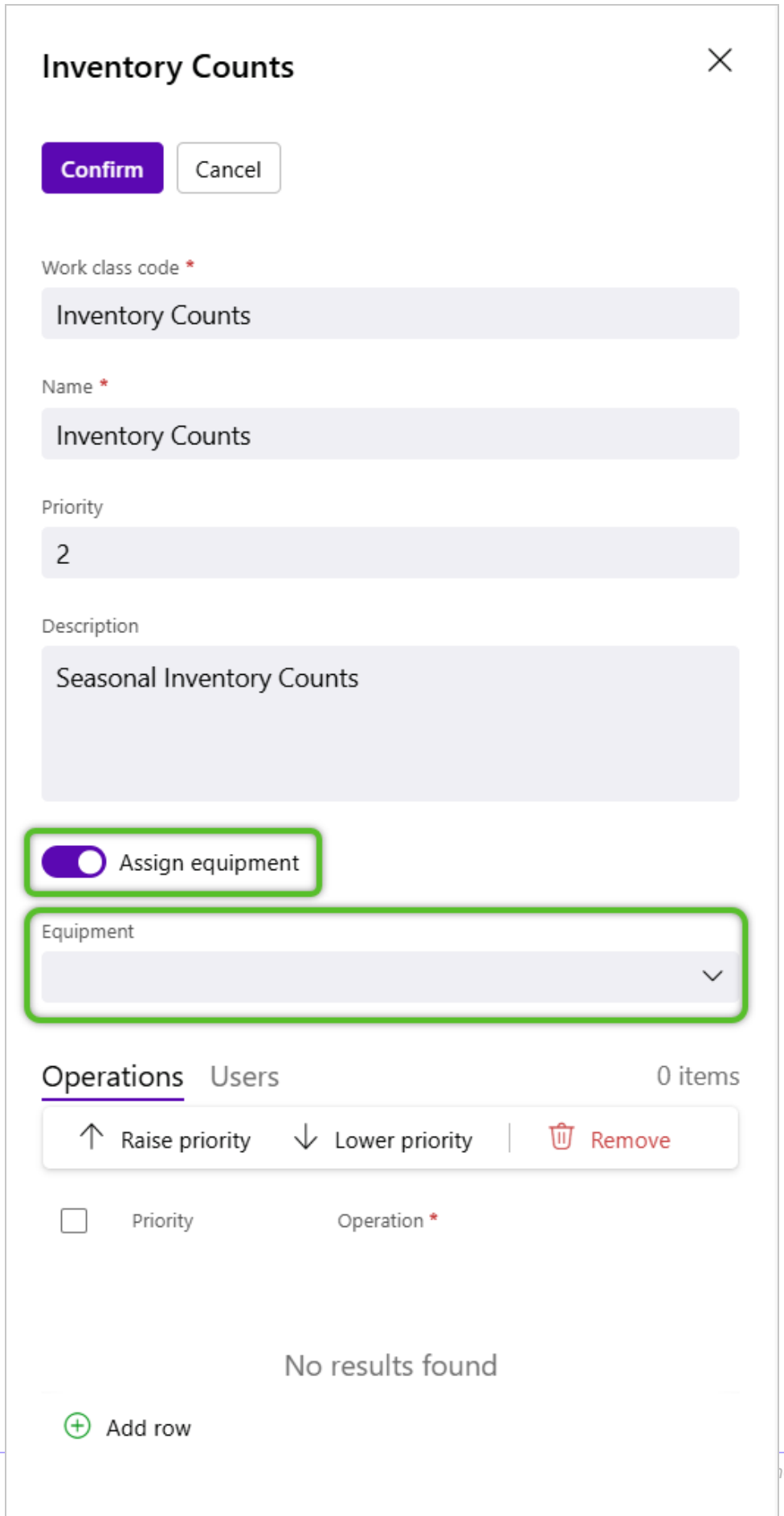

Inventory Counts
Confirm
Cancel
Work class code *
Inventory Counts
Name *
Inventory Counts
Priority
0
Description
Assign equipment
Operations
Users
0 items
Raise priority
Lower priority
Remove
Priority
Operation *
No results found
Add row

Both the window and the required **Name** field update to the short code, which can be updated.

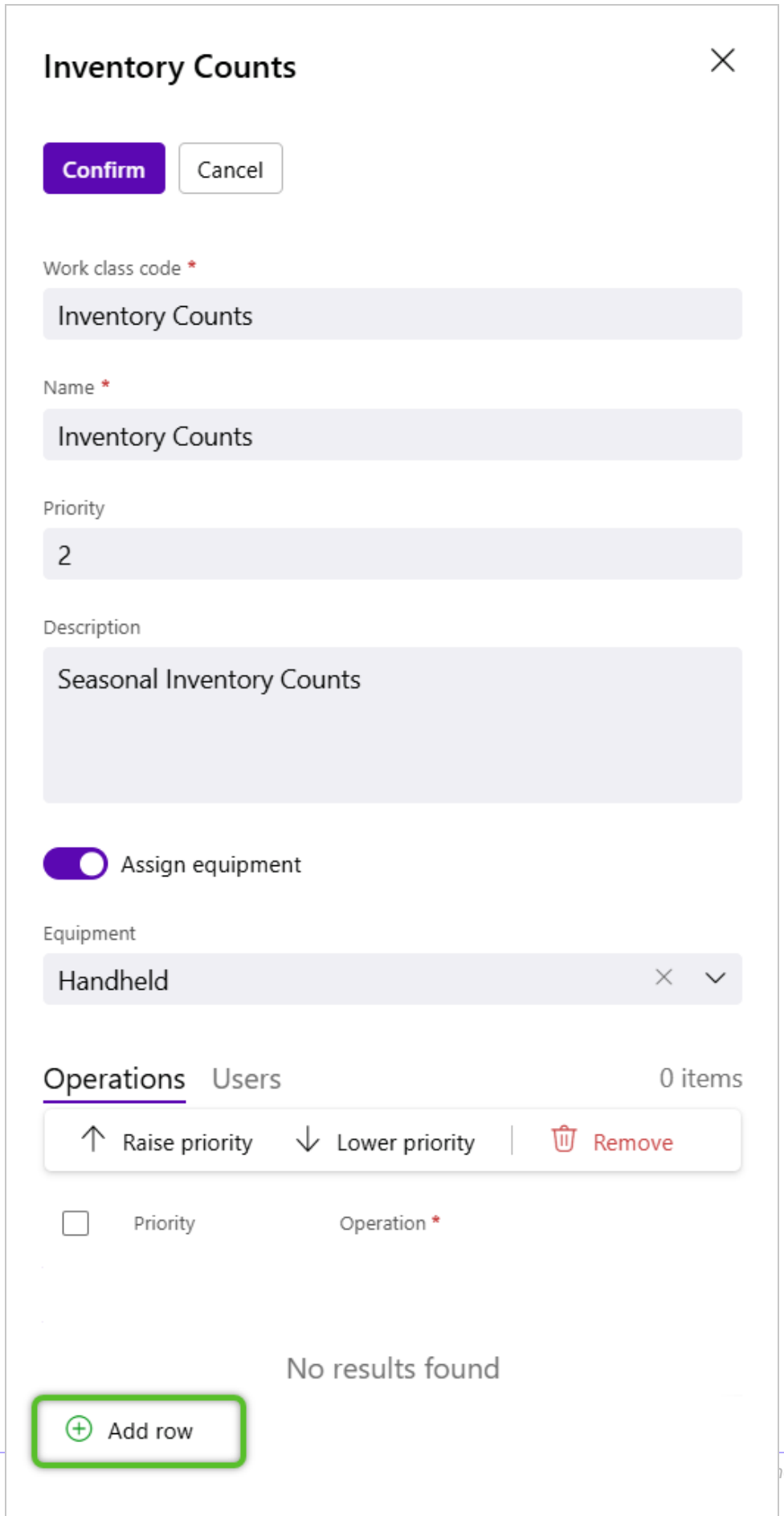
3. (Optional) Set the Priority and enter a Description for the Work Class.


Inventory Counts
Confirm
Cancel
Work class code *
Inventory Counts
Name *
Inventory Counts
Priority
2
Description
Seasonal Inventory Counts
Assign equipment
Operations
Users
0 items
Raise priority
Lower priority
Remove
Priority
Operation *
No results found
Add row

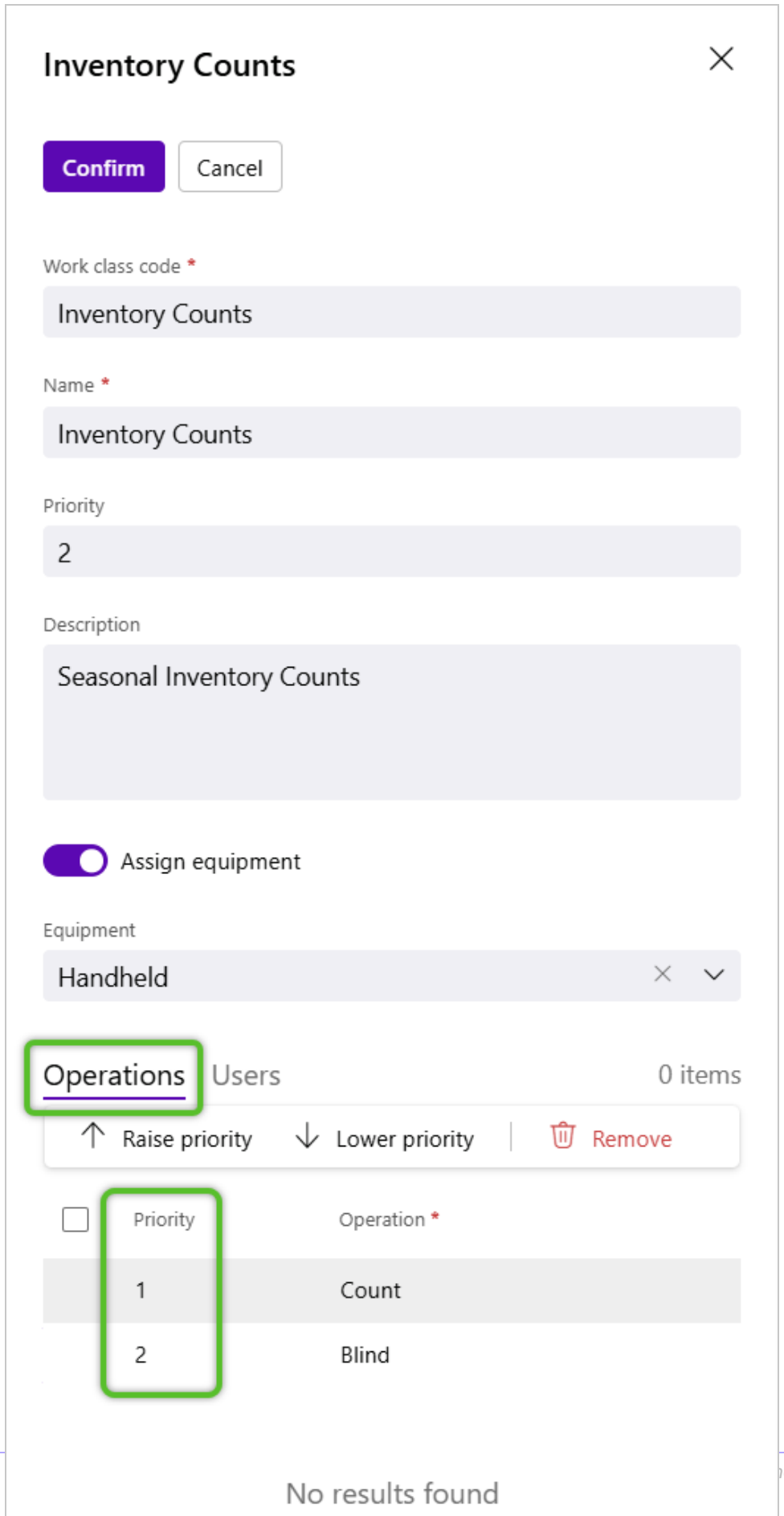
4. If this new **Work Class** will have **Equipment** assigned, click the **Assign equipment** toggle and select the **Equipment** from the dropdown.


Inventory Counts
Confirm
Cancel
Work class code *
Inventory Counts
Name *
Inventory Counts
Priority
2
Description
Seasonal Inventory Counts
Assign equipment
Equipment
Operations
Users
0 items
Raise priority
Lower priority
Remove
Priority
Operation *
No results found
Add row

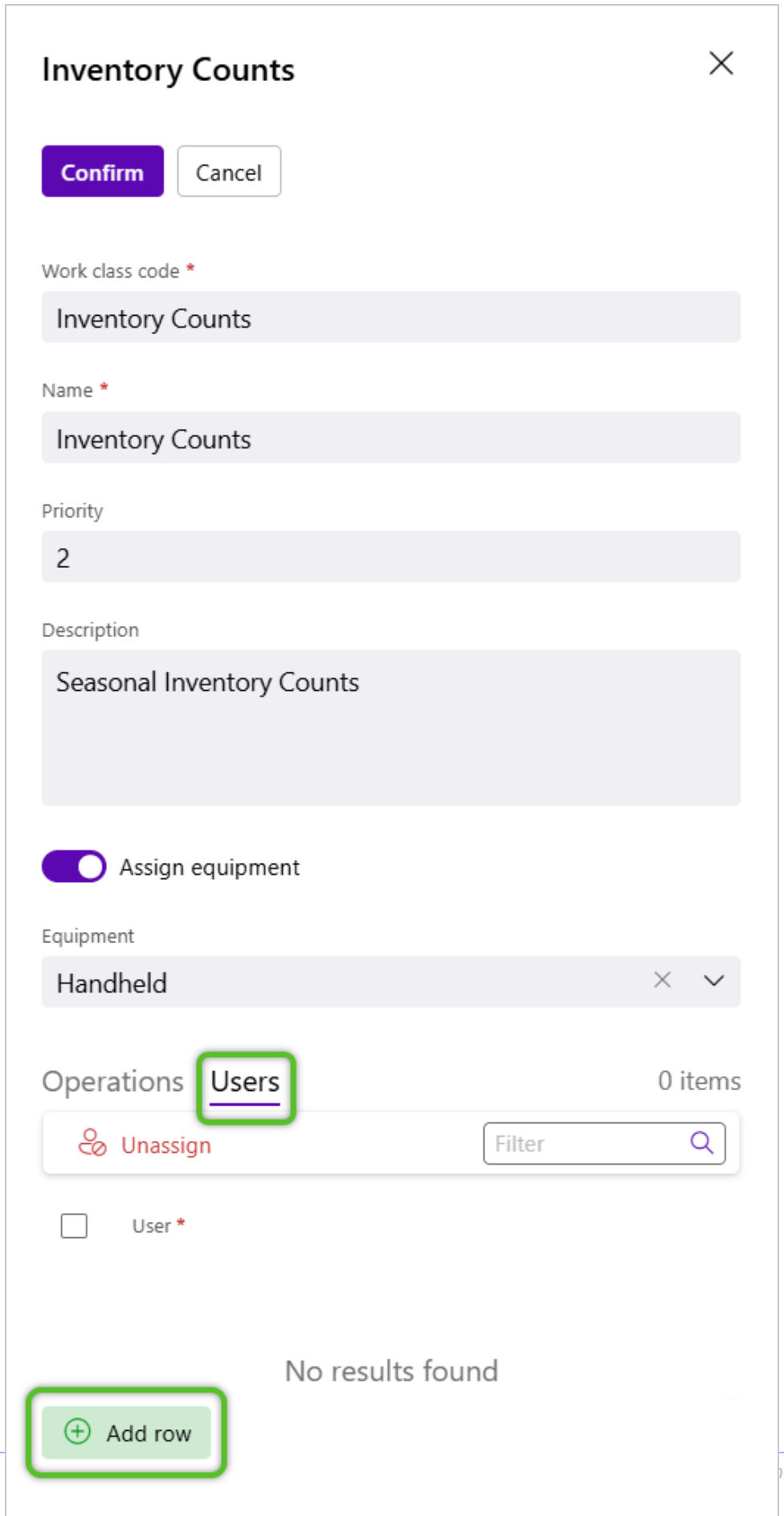
5. On the **Operations** tab, locate and click the **+ Add row** button to add **Operations** to the new **Work Class**.


Inventory Counts
Confirm
Cancel
Work class code *
Inventory Counts
Name *
Inventory Counts
Priority
2
Description
Seasonal Inventory Counts
Assign equipment
Equipment
Handheld
Operations
Users
0 items
Raise priority
Lower priority
Remove
Priority
Operation *
No results found
Add row

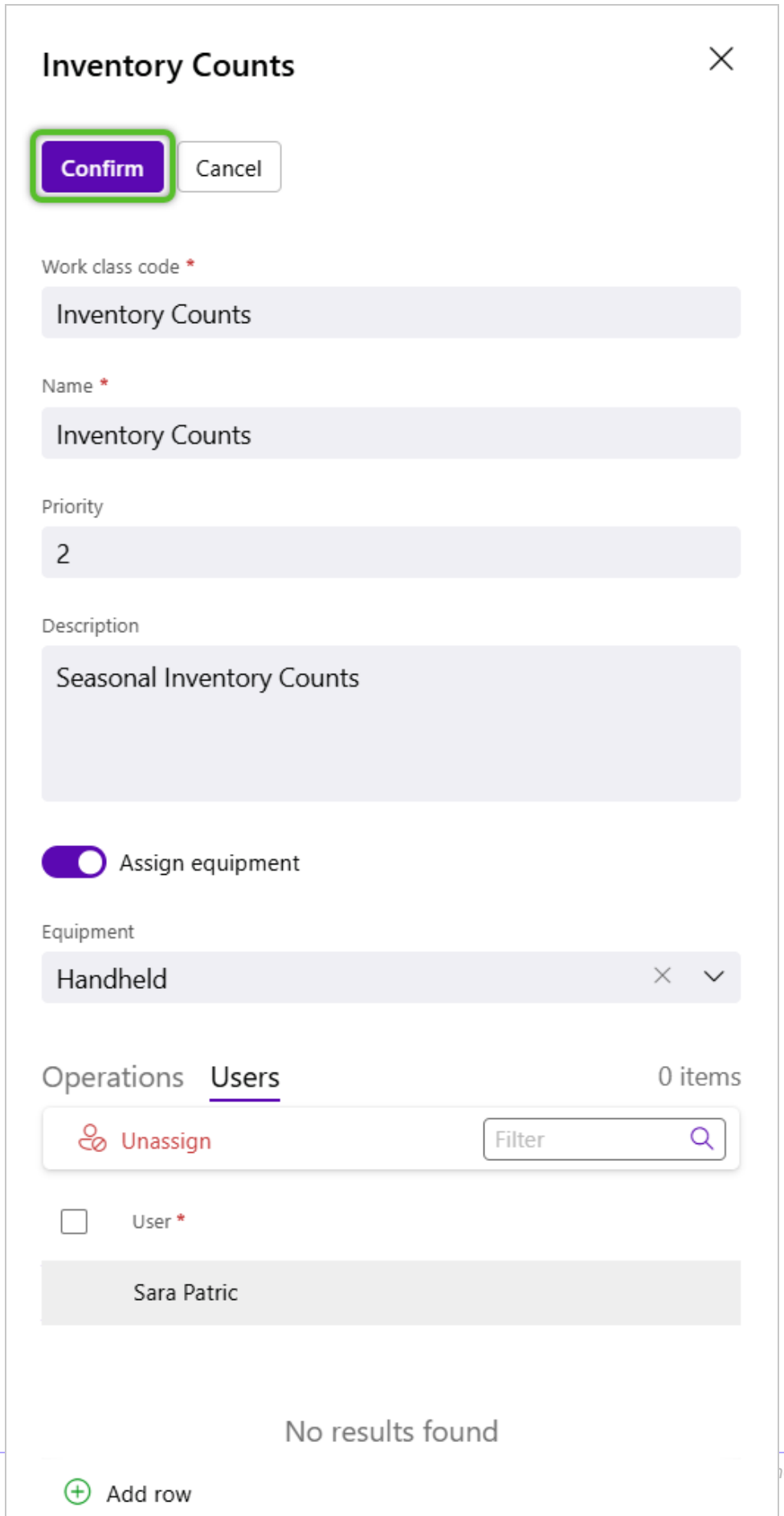
The **Operations** will be listed in the tab by **Priority** in the order which they were added. This can be updated.


Inventory Counts
Confirm
Cancel
Work class code *
Inventory Counts
Name *
Inventory Counts
Priority
2
Description
Seasonal Inventory Counts
Assign equipment
Equipment
Handheld
Operations
Users
0 items
Raise priority
Lower priority
Remove
Priority
Operation *
1
Count
2
Blind
No results found

6. To assign users to this new **Work Class**, click the **Users** tab, click the **+ Add row** button, then locate and select the user(s) to assign to the new **Work Class**.


Inventory Counts
Confirm
Cancel
Work class code *
Inventory Counts
Name *
Inventory Counts
Priority
2
Description
Seasonal Inventory Counts
Assign equipment
Equipment
Handheld
Operations
Users
0 items
Unassign
Filter
User *
No results found
Add row

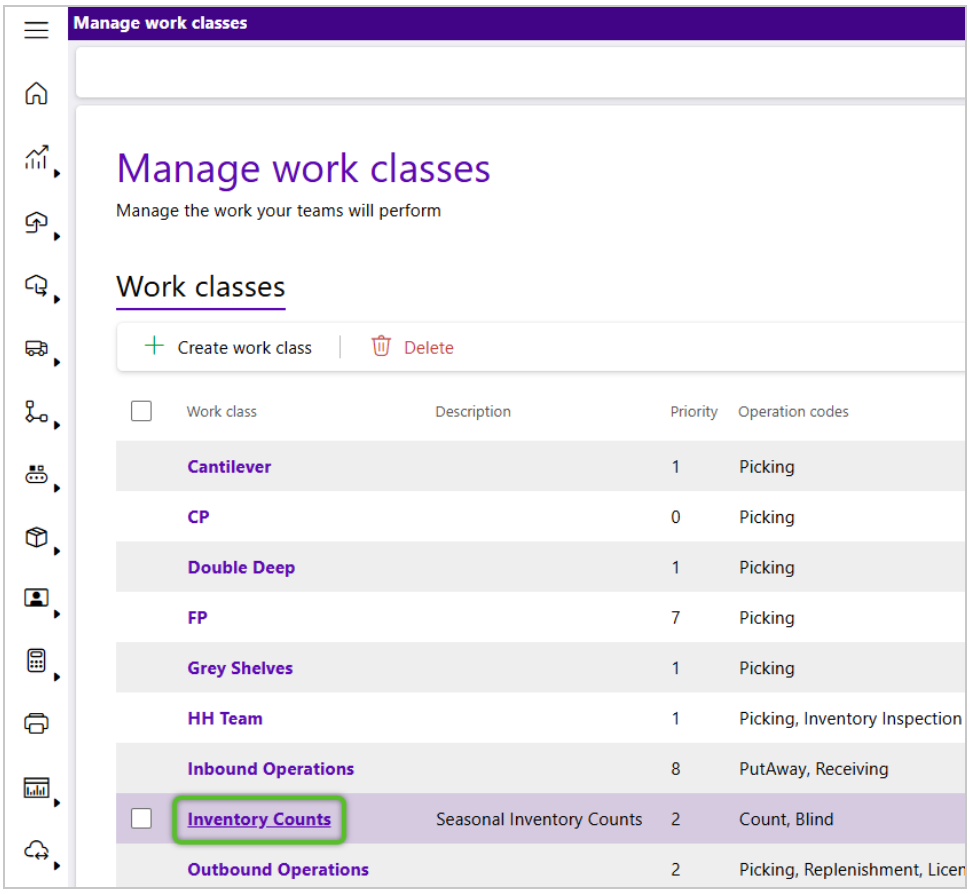
7. Once all the new Work Class details have been entered, click the Confirm button in the top left.


Inventory Counts
Confirm
Cancel
Work class code *
Inventory Counts
Name *
Inventory Counts
Priority
2
Description
Seasonal Inventory Counts
Assign equipment
Equipment
Handheld
Operations
Users
0 items
Unassign
Filter
User *
Sara Patric
No results found
Add row

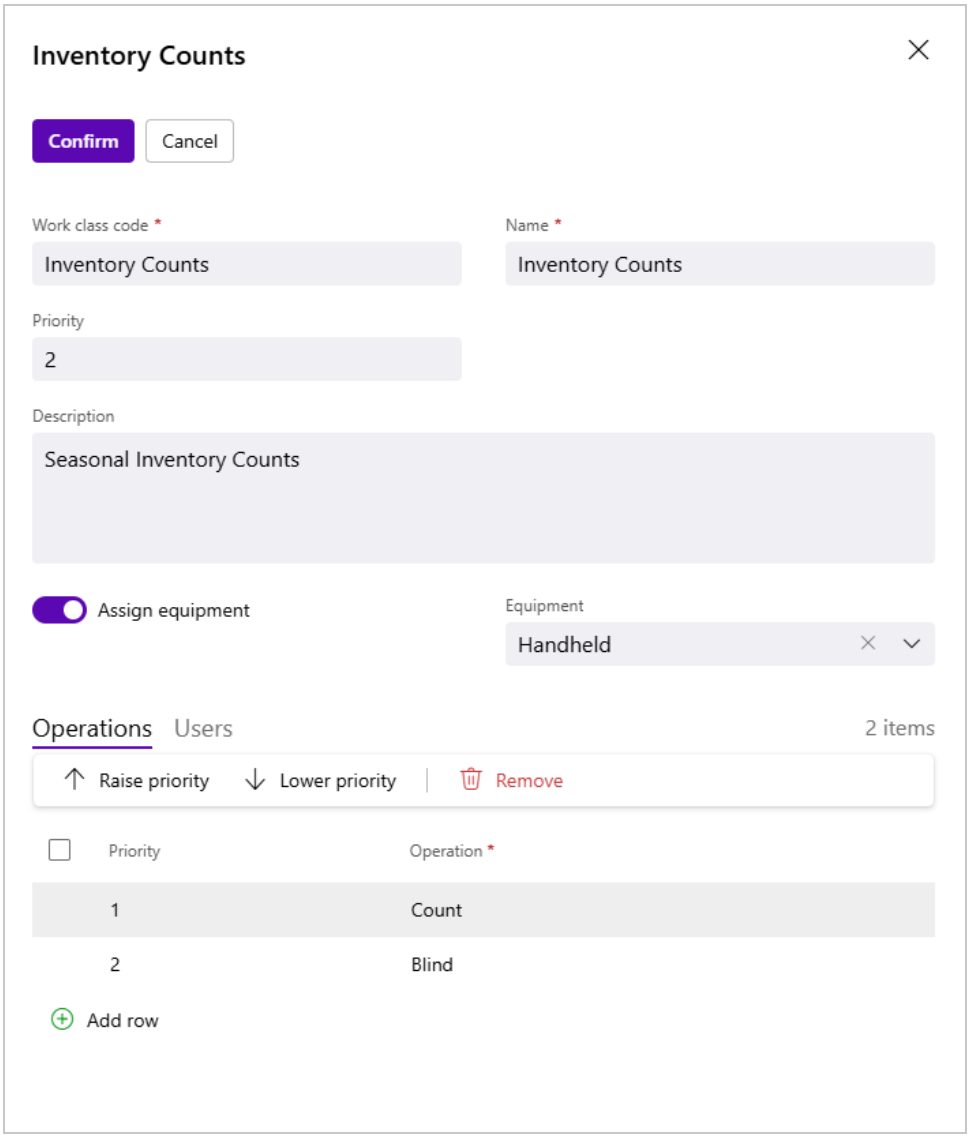
The Work Class will now be available for use and management in Footprint

Edit a Work Class

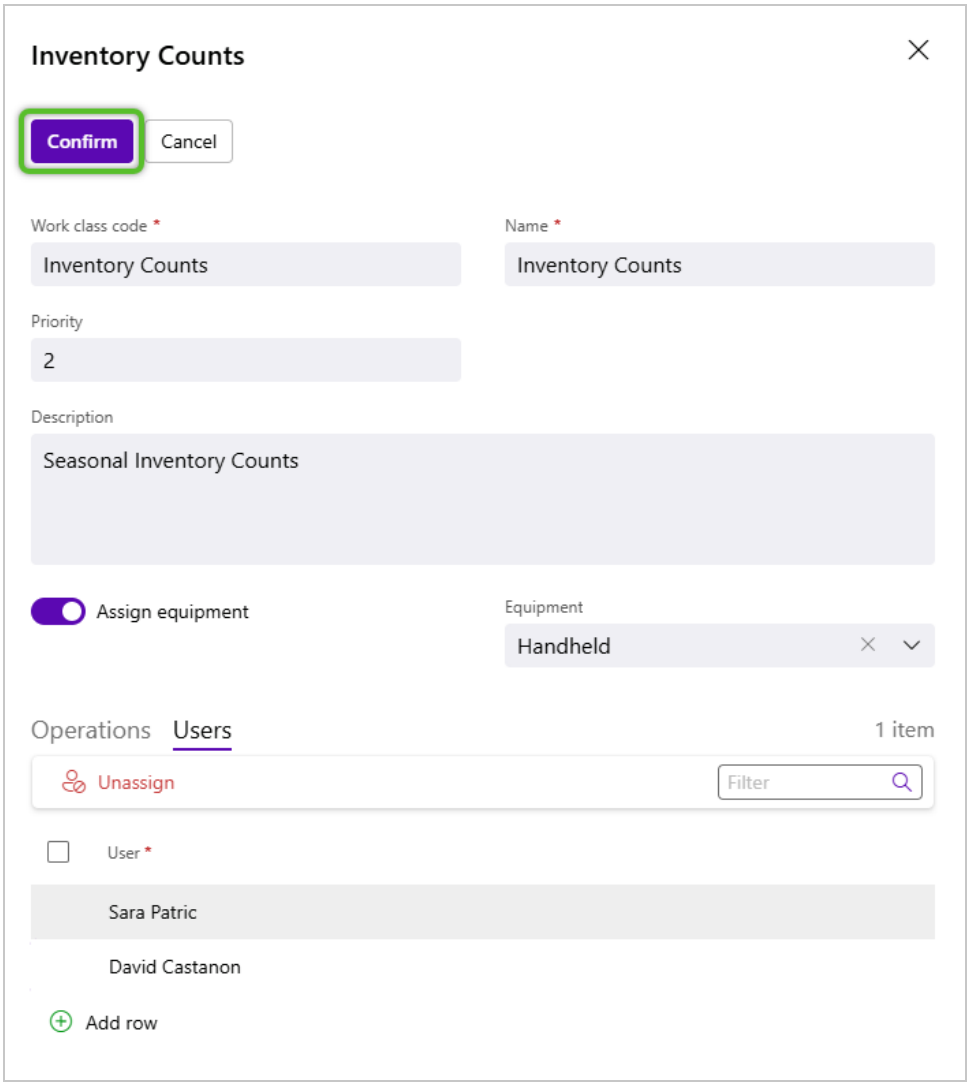
1. To edit a Work Class, locate the Work Class and click the associated link the Work Class field.



The Work Class window will open along the right side of the screen and allows for the details to be edited.



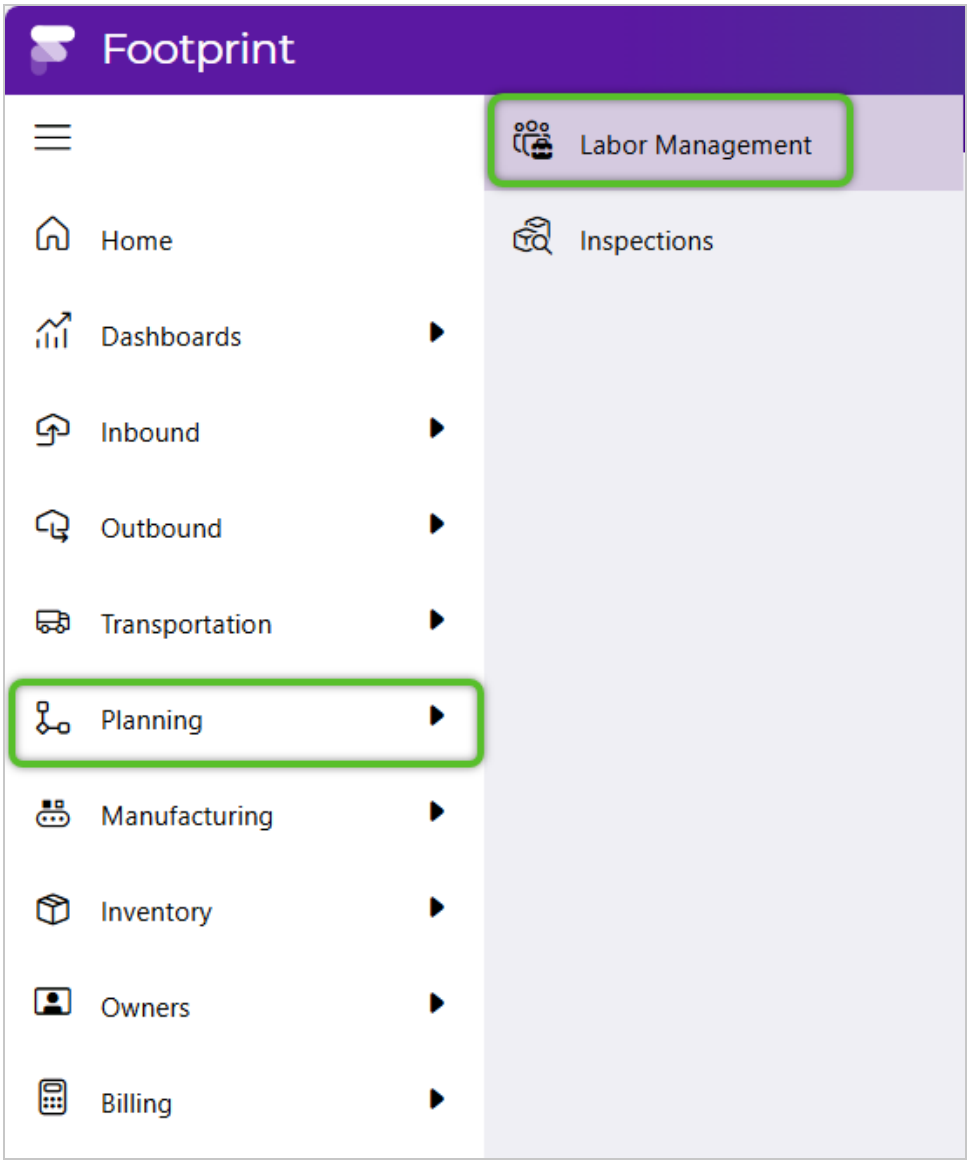
2. Once all the necessary Work Class details have been updated, click the Confirm button in the top left.



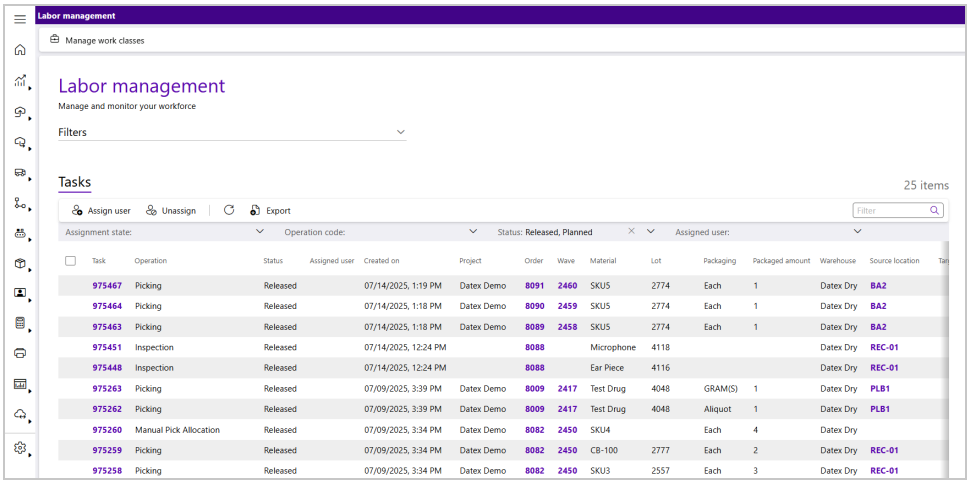
How to Assign and Unassign Tasks

Everything in Footprint, every action from Receiving Inventory to changed a Status or Completing an Order, is represented by a Task.

To assign or unassign **Tasks**, click **Planning** in the left navigation menu, then click the **Labor Management** submenu item.



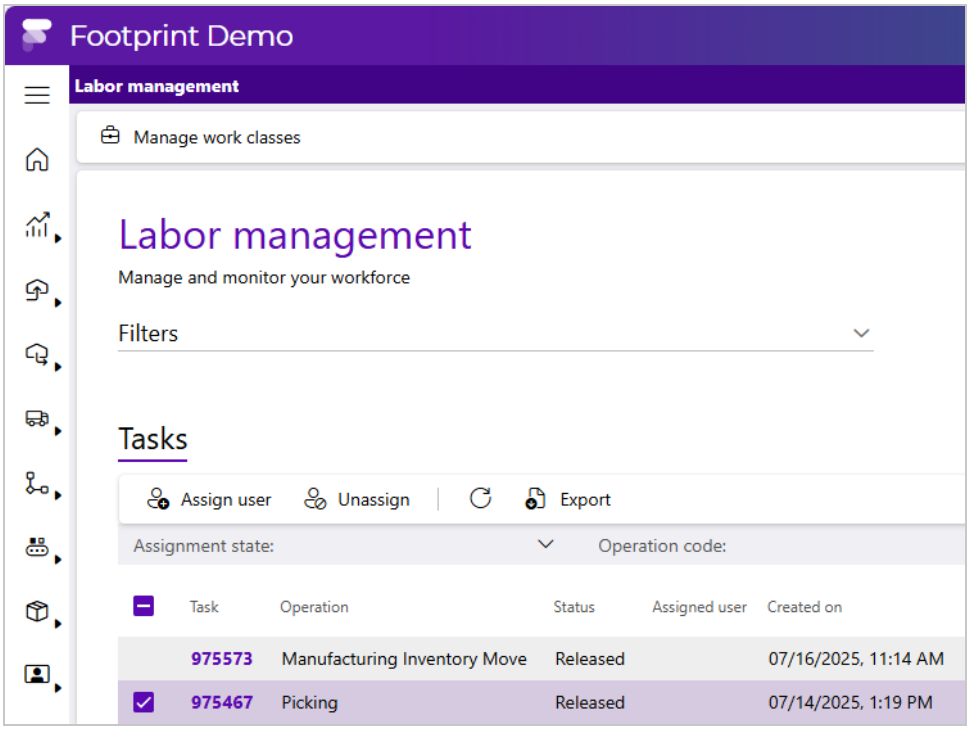
The **Labor Management Hub** will display



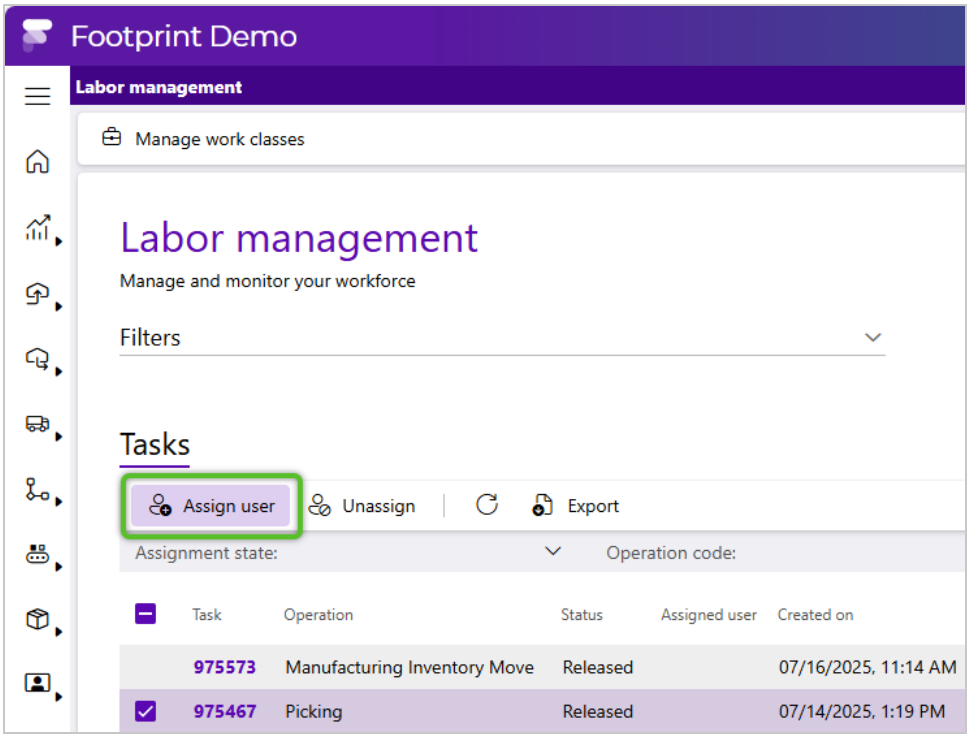
Assign Tasks to Users

Tasks contain details ranging from the **Material** involved in the **Task** to the employee associated with it. **Tasks** are best described by their **Operation Code**, which indicates how the task was created and the intent of the Task.

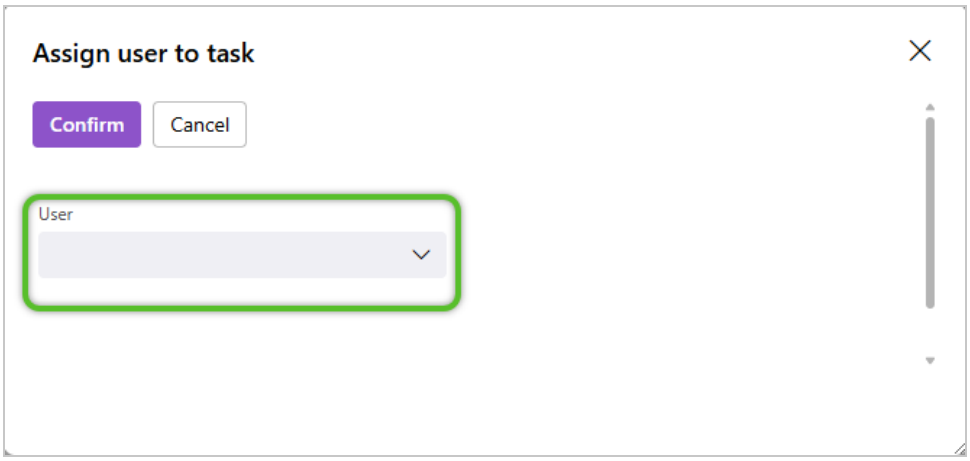
1. To assign **Tasks** to a user, locate the **Task**, then check the box to the left of it.



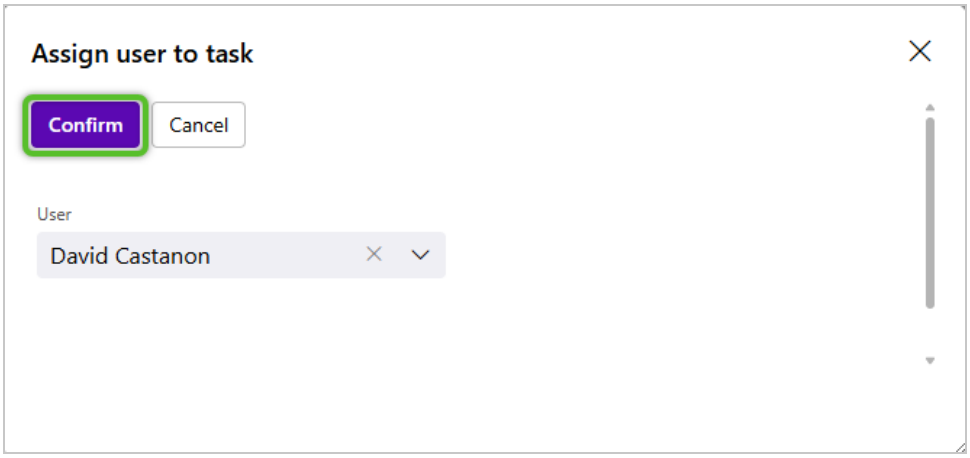
2. Click the **Assign user** button in the **Tasks** toolbar.



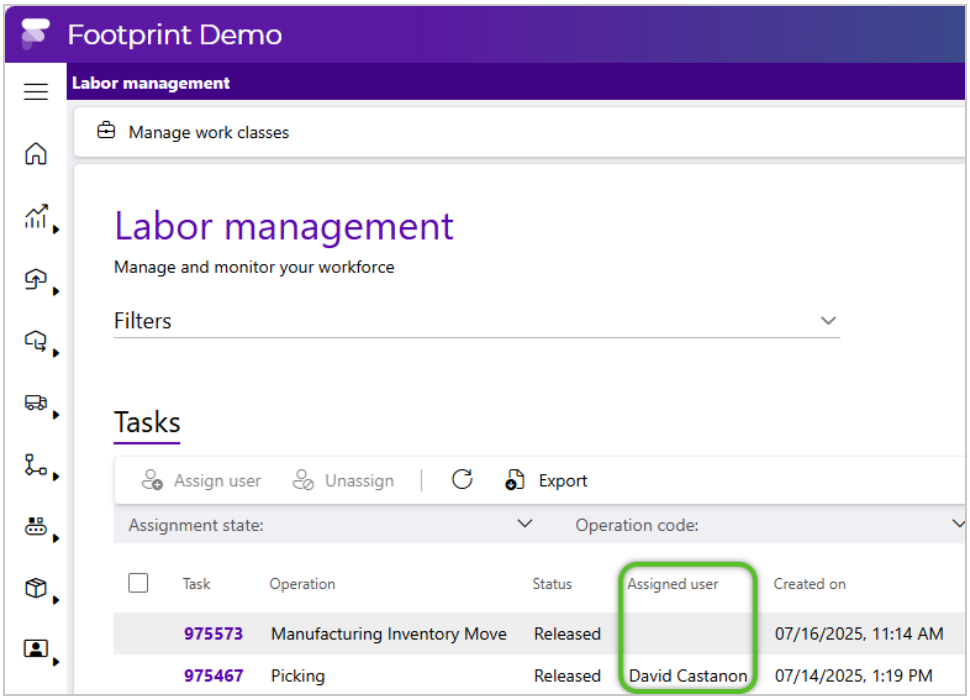
3. In the **Assign user to task** window, select a user from the dropdown.



4. Once a user has been assigned, click the **Confirm** button in the top left.

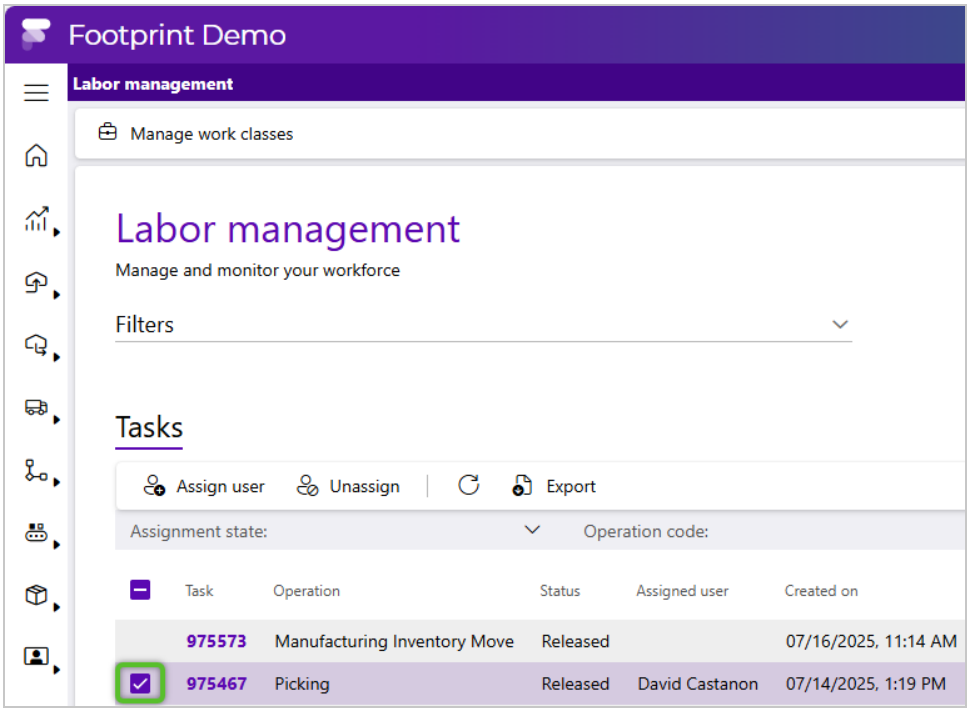


The user will now have the specific **Task** assigned to them.

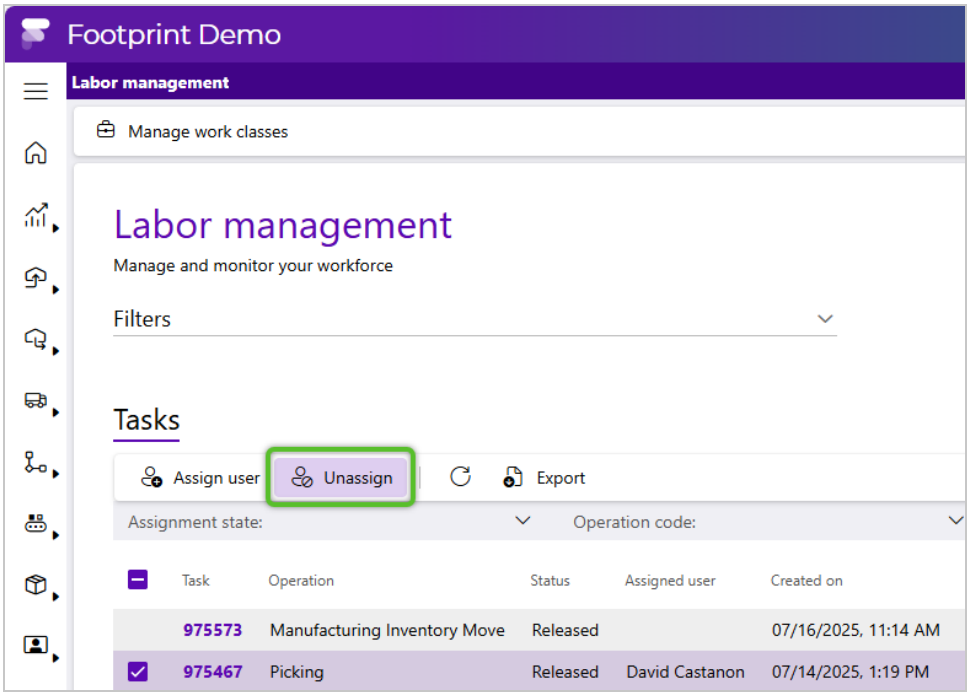


Unassign Tasks

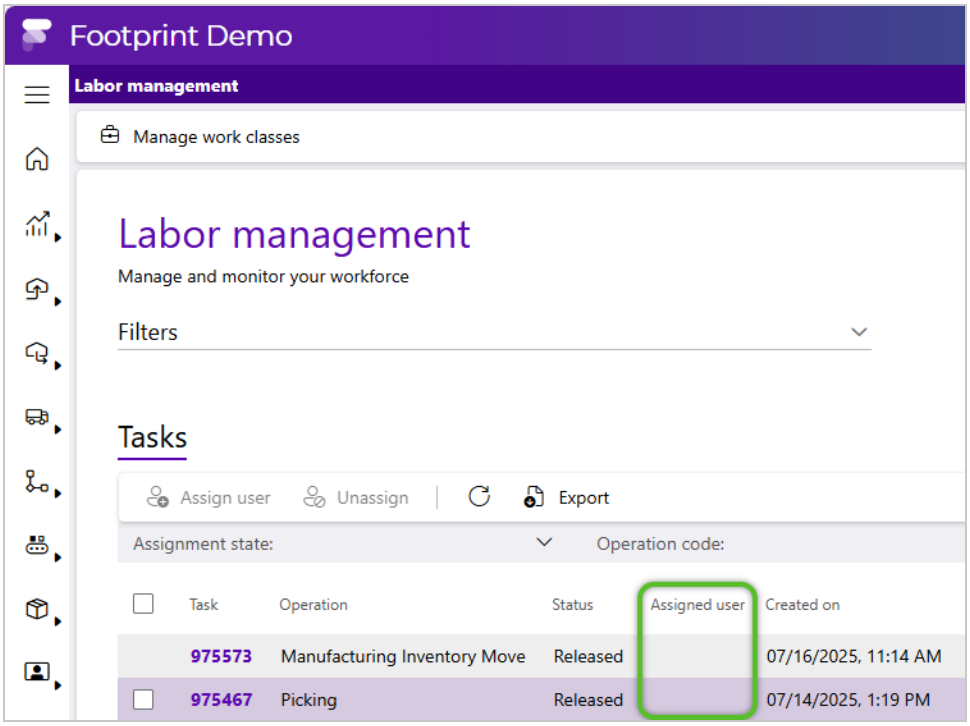
1. To unassign **Tasks**, the locate the **Task**, then check the box to the left of it.



2. Click the Unassign button in the Tasks toolbar.



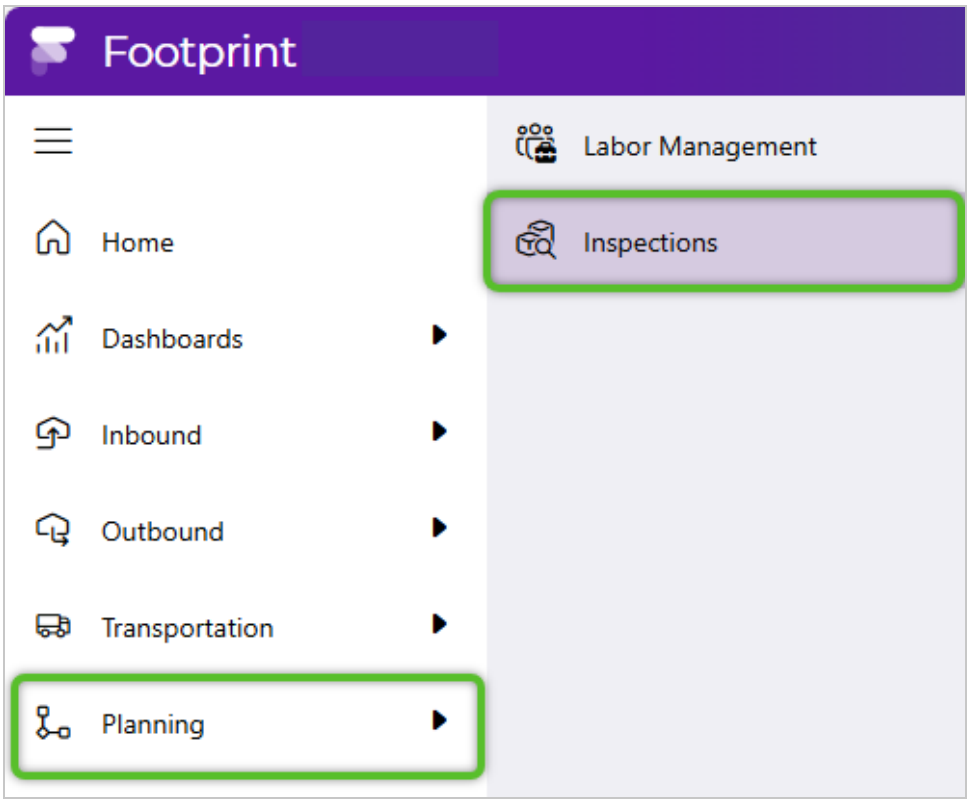
The Task will be updated without a user assigned.



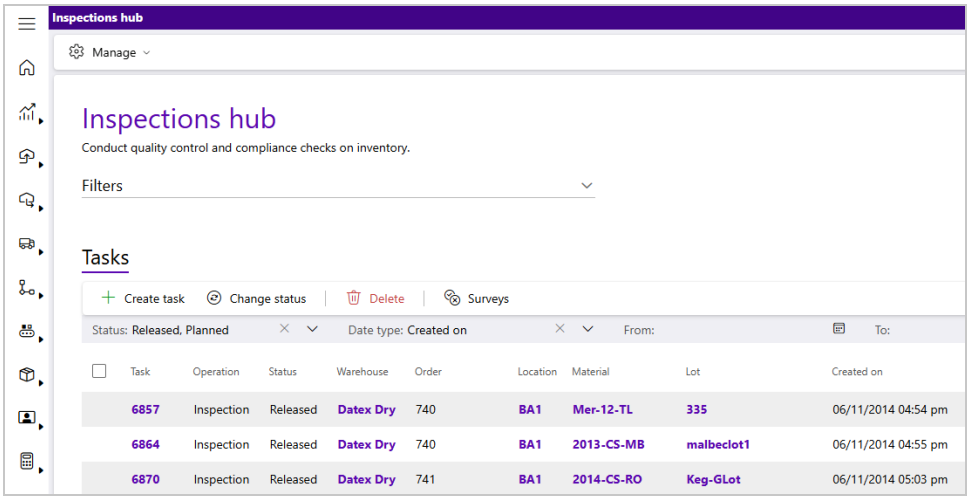
How to Create Inspection Operations

Inspection Operations are required to create **Inspection Tasks**, and are the only Type of **Operation** that can be created from the **Inspections Hub**.

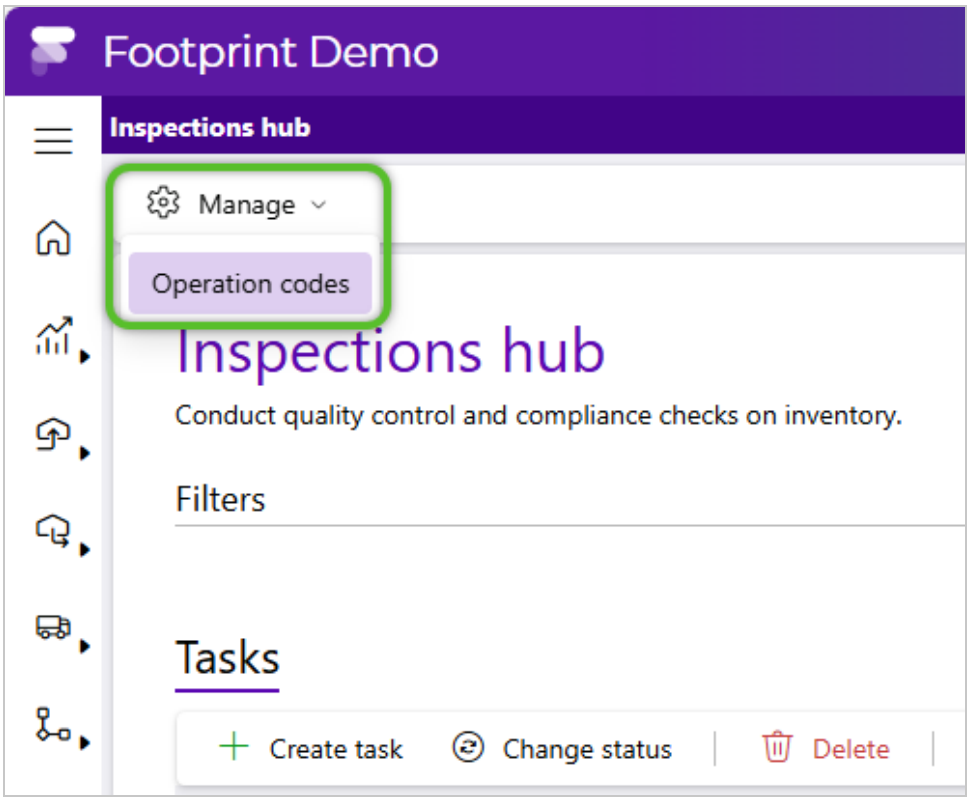
1. To create a new **Inspection Operations**, click **Planning** in the left navigation menu, then click **Inspections** submenu option.



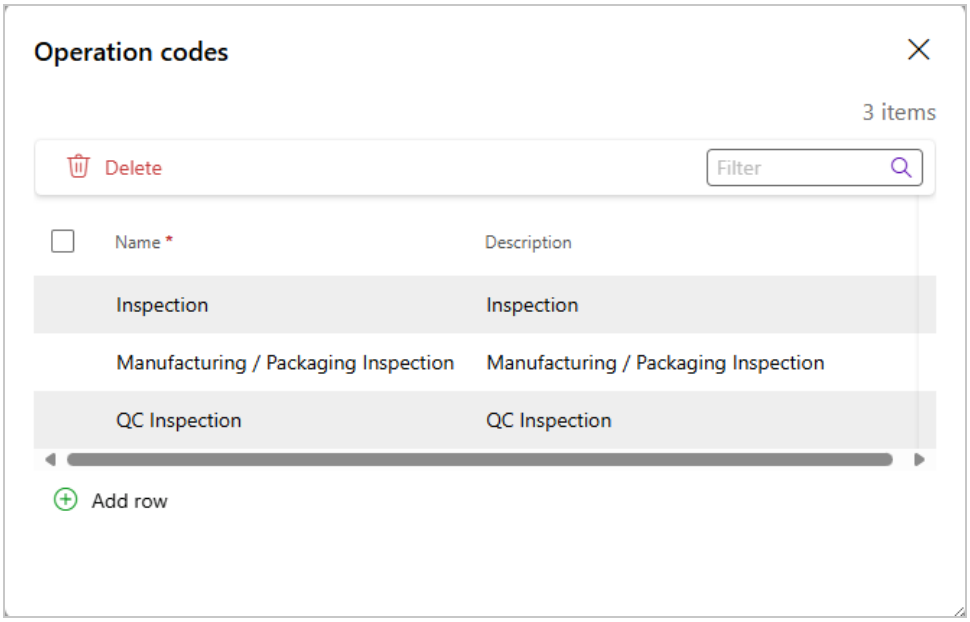
The **Inspections Hub** will display.



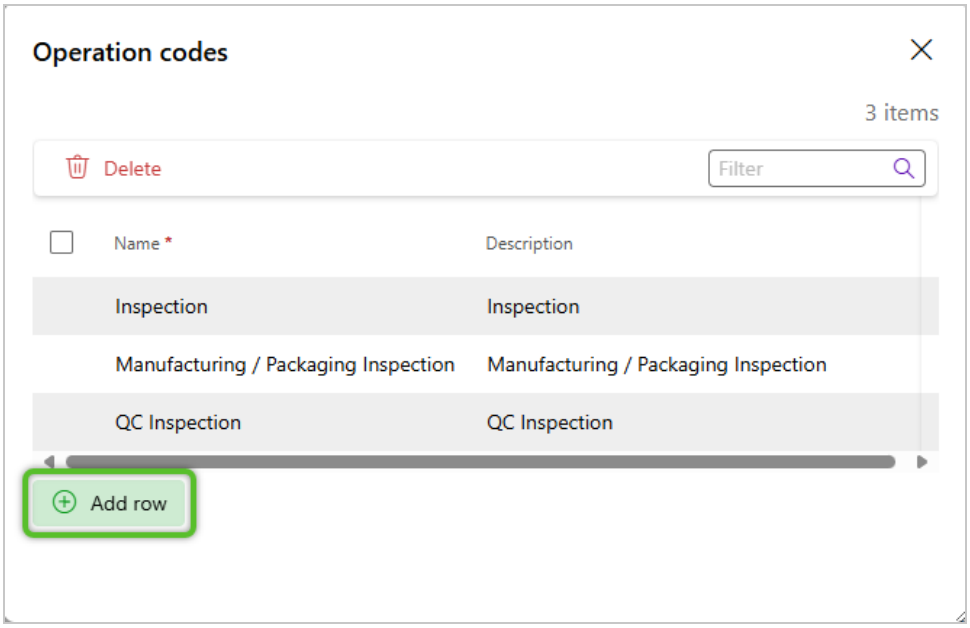
2. Click the **Manage** option in the hub toolbar, then select **Operation Codes**.



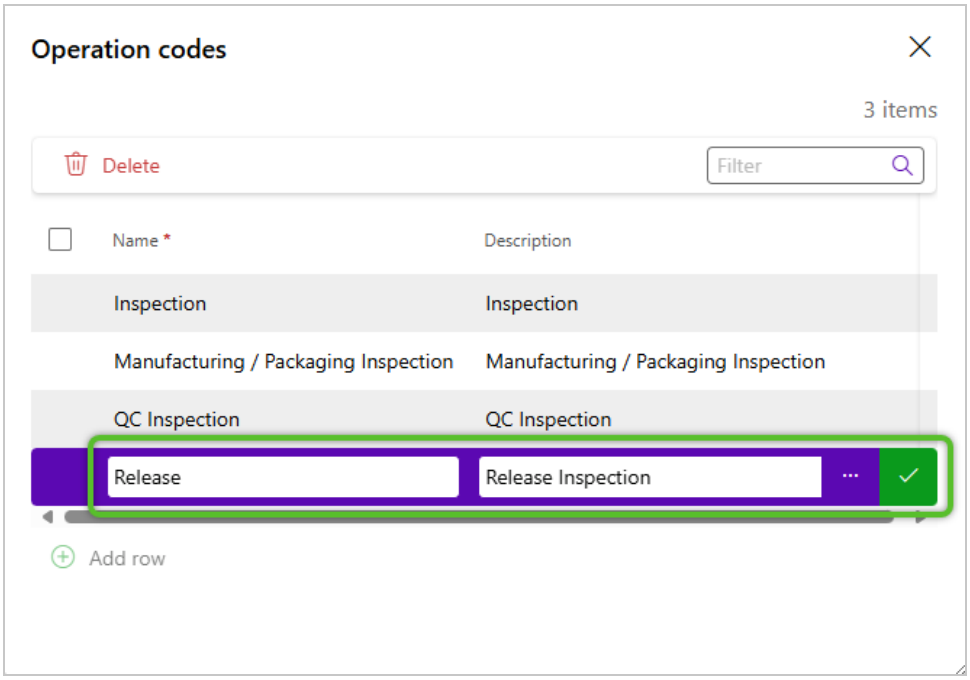
The **Create inspection operations** window opens displaying existing Inspection Operations for management.



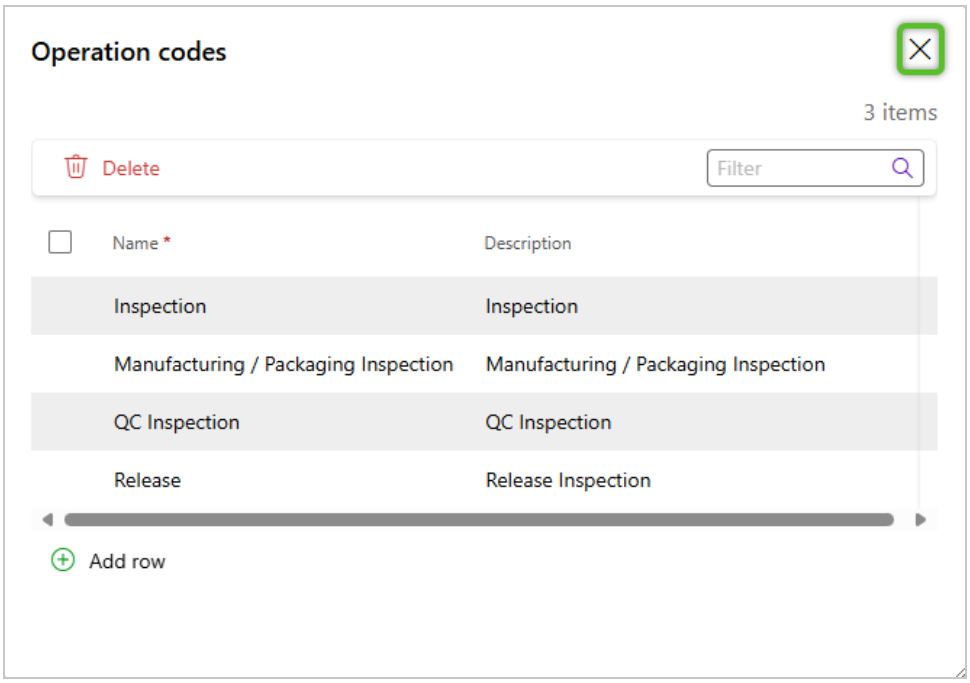
3. Click the **+Add Row** option to create a new Operation Code for **Inspection Tasks**.



4. Enter the **Name** and a **Description**, then click the checkmark at the end of the row to save the new Inspection Operation.



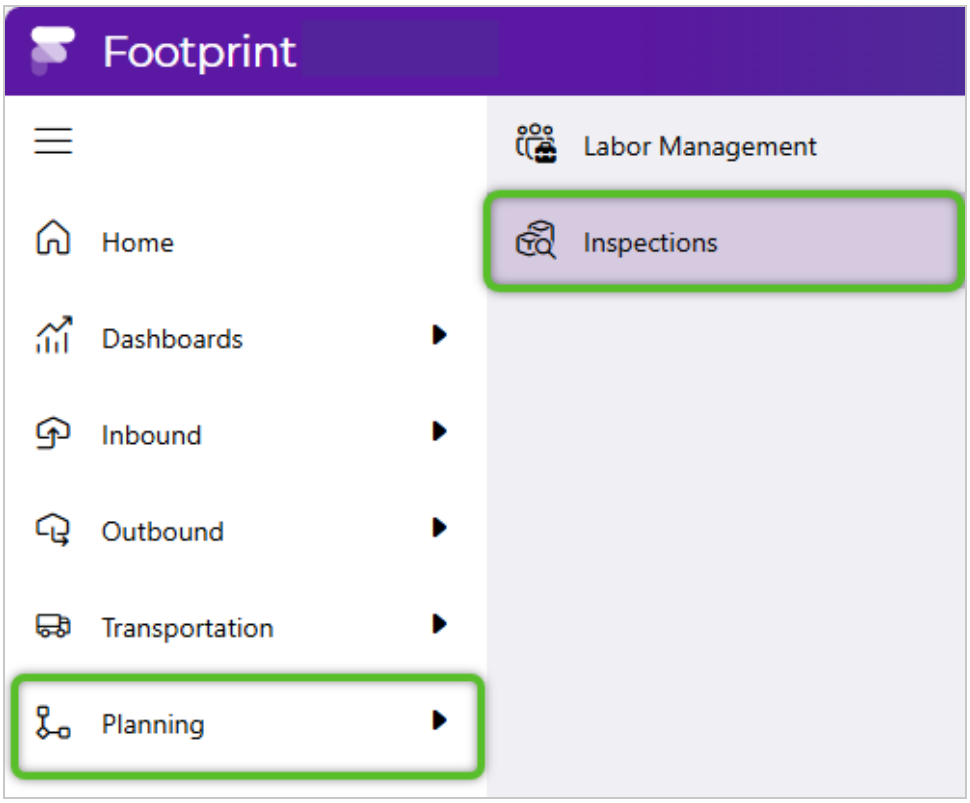
5. Close the window once the row has been added, and the new **Operation Code** will be available for use in **Inspection Tasks**.



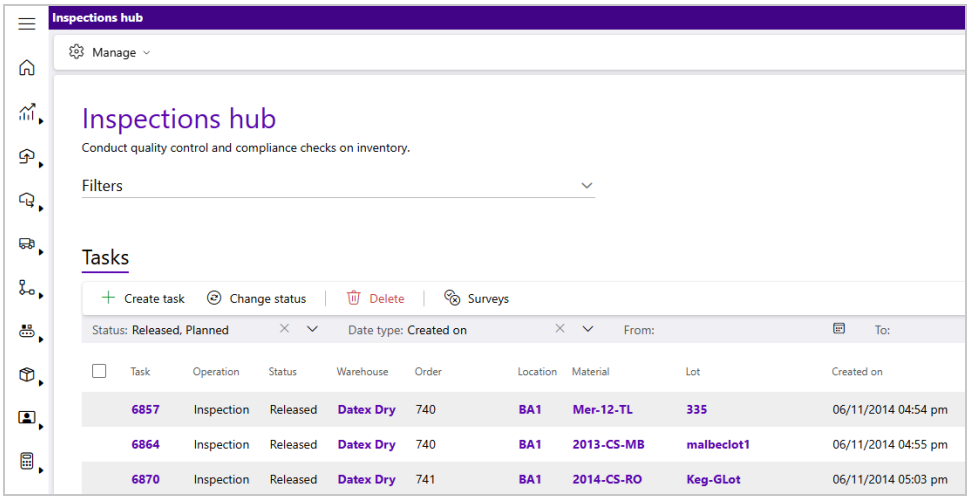
How to Create Inspection Tasks

Inspection Tasks can be assigned to allow specific details to be verified, such as Quantity and Lots.

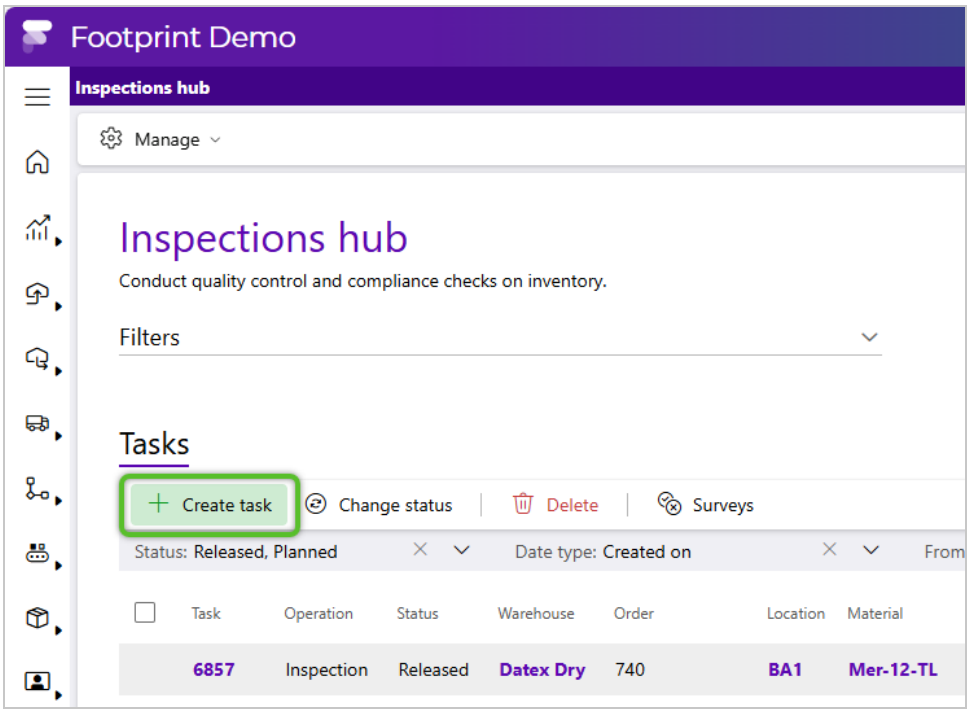
1. To create a new **Inspection Task**, click **Planning** in the left navigation menu, then click **Inspections** submenu option.



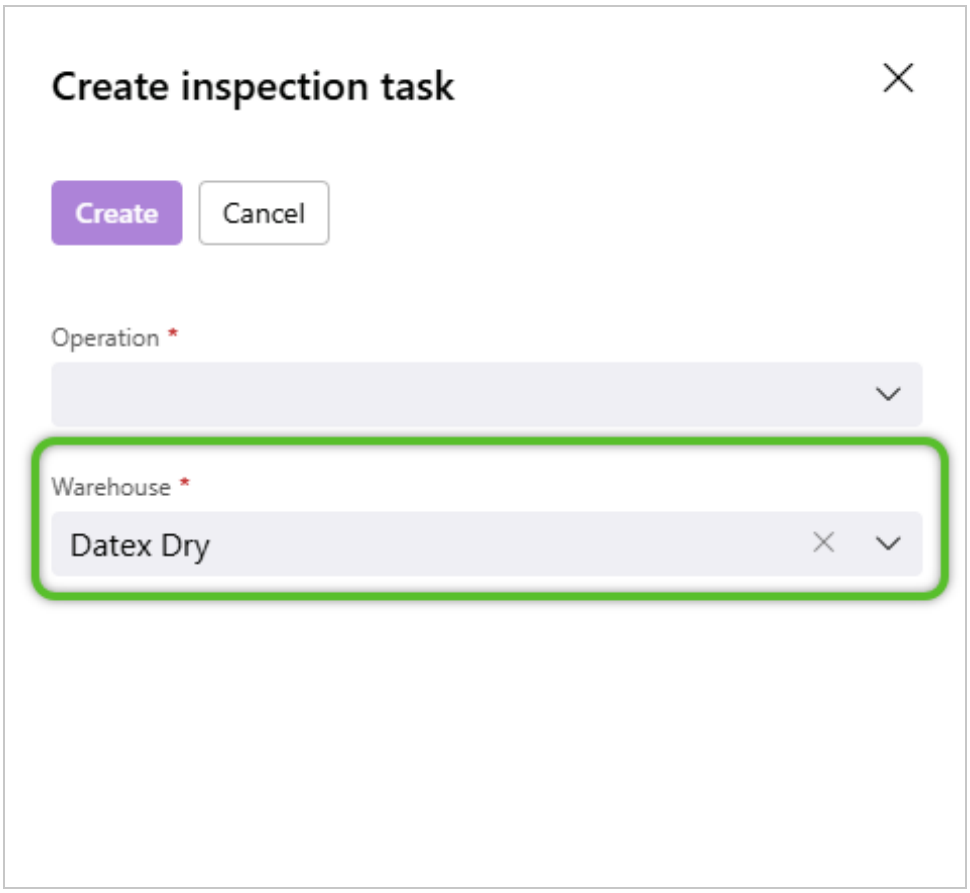
The **Inspections Hub** will display.



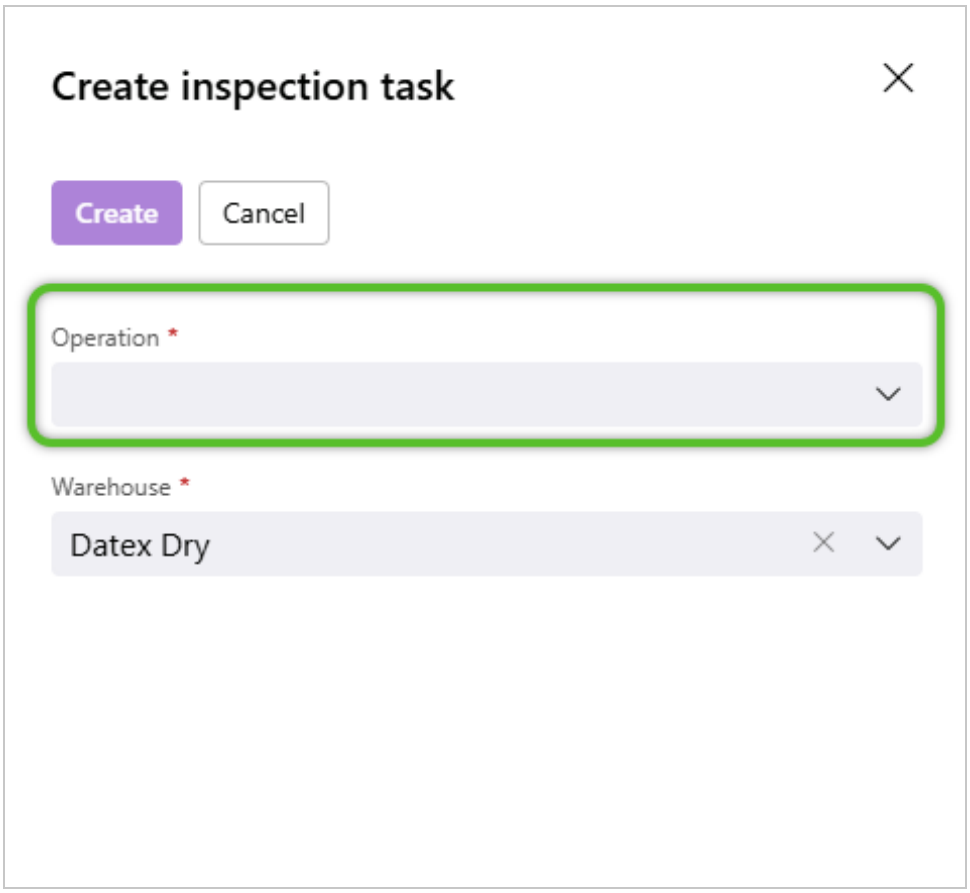
2. Click the **+ Create task** option in the **Tasks** tab toolbar.



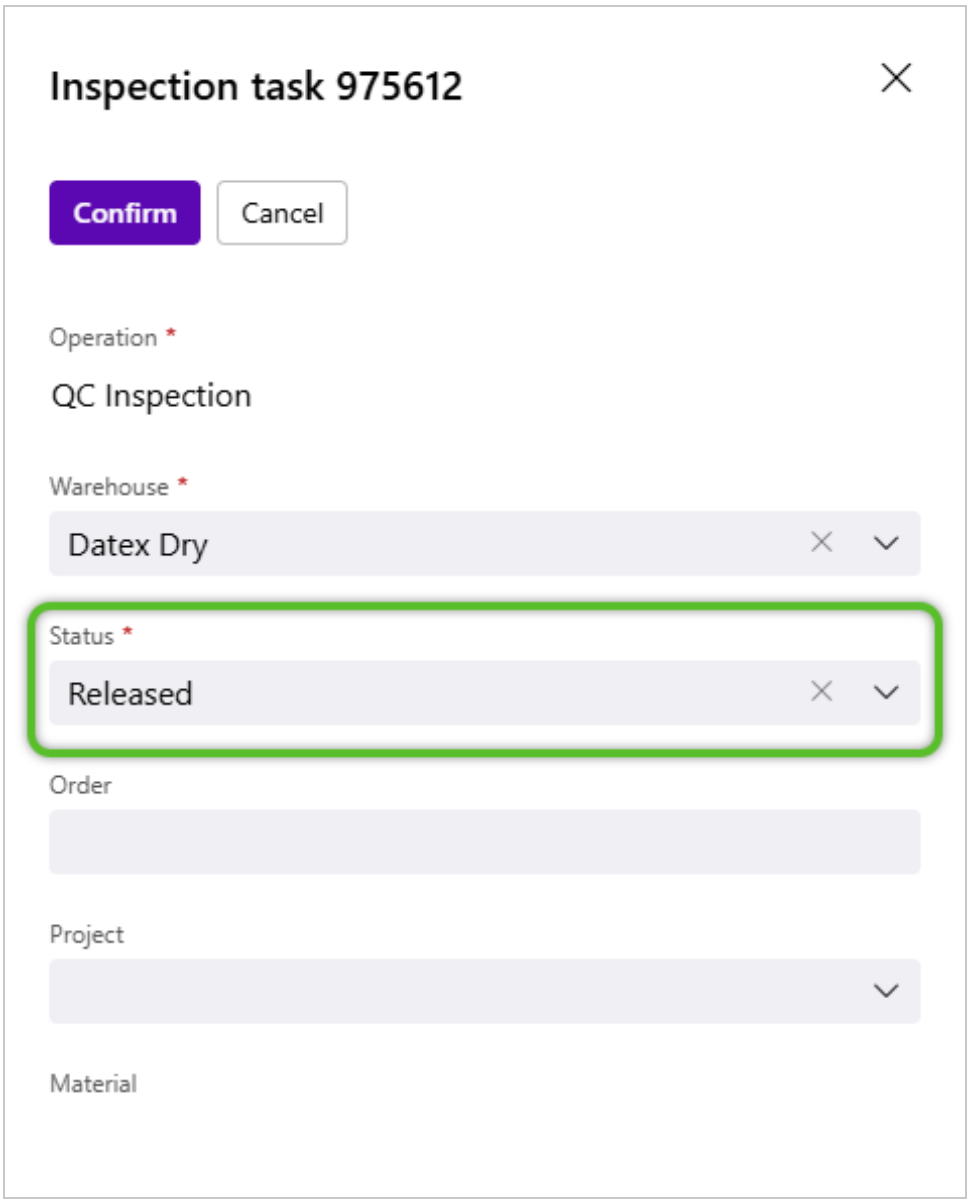
In the **Create inspection task** window, the **Warehouse** will populated based on user.



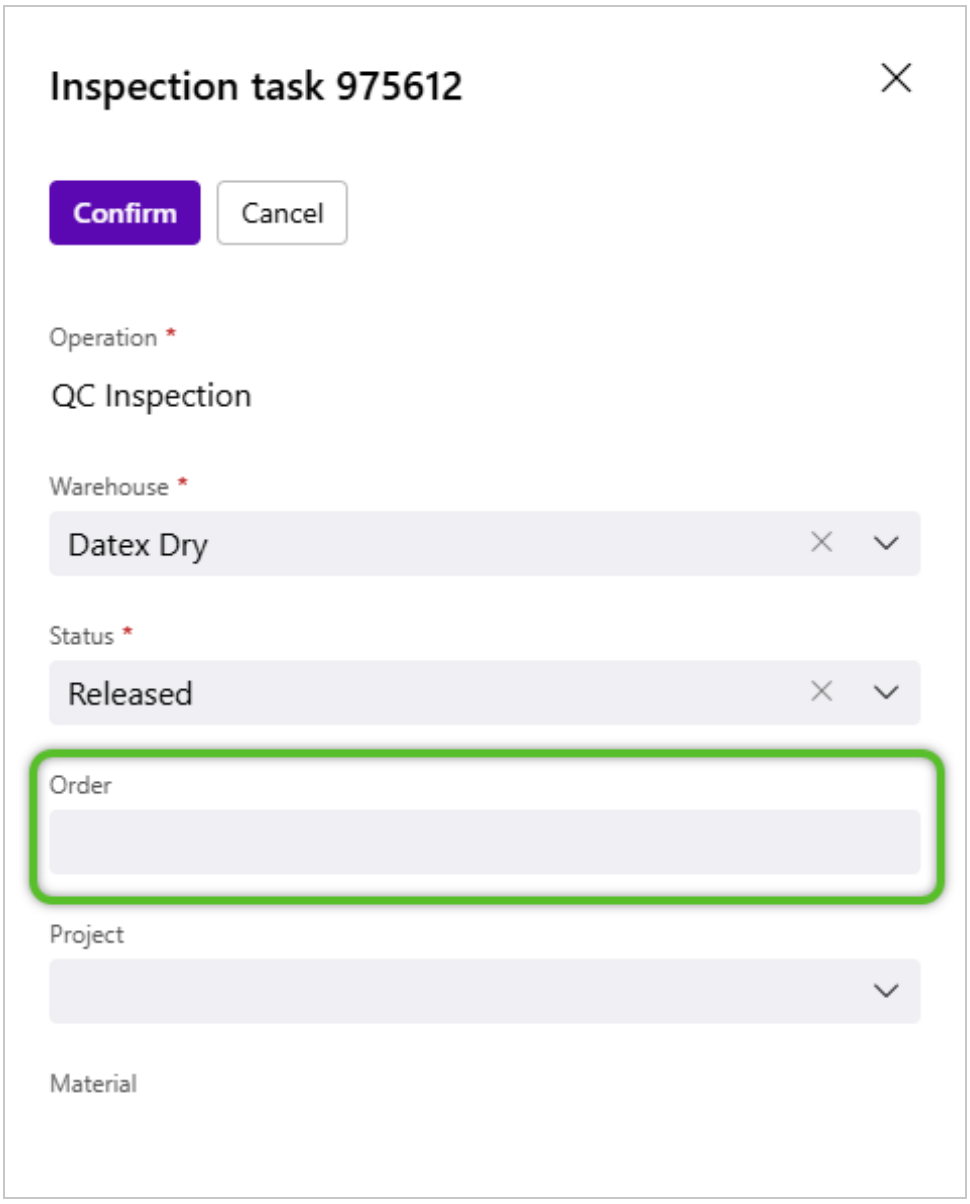
3. Select a required Inspection Task **Operation**.



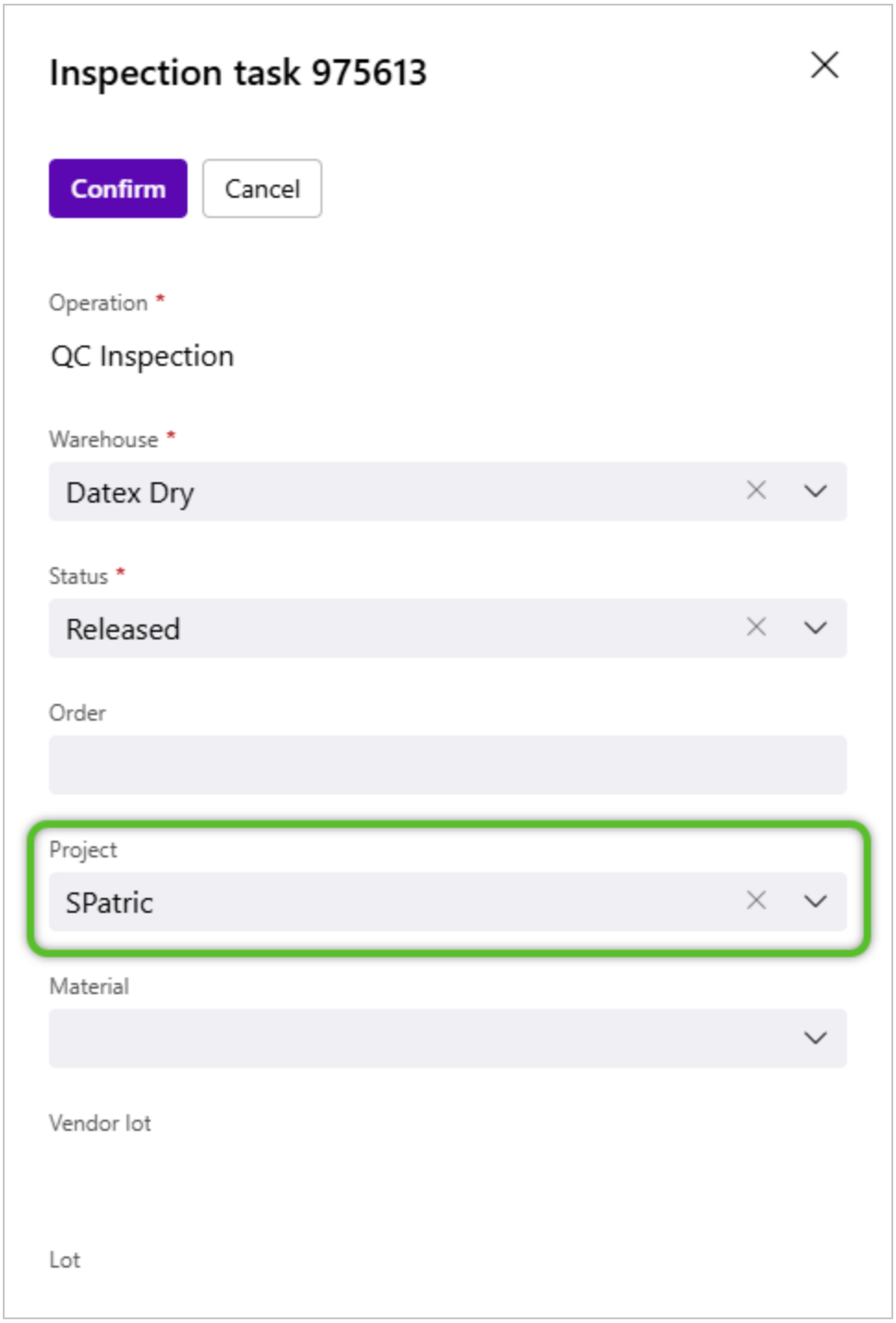
When the screen updates, the **Status** defaults to **Released** and can be changed.



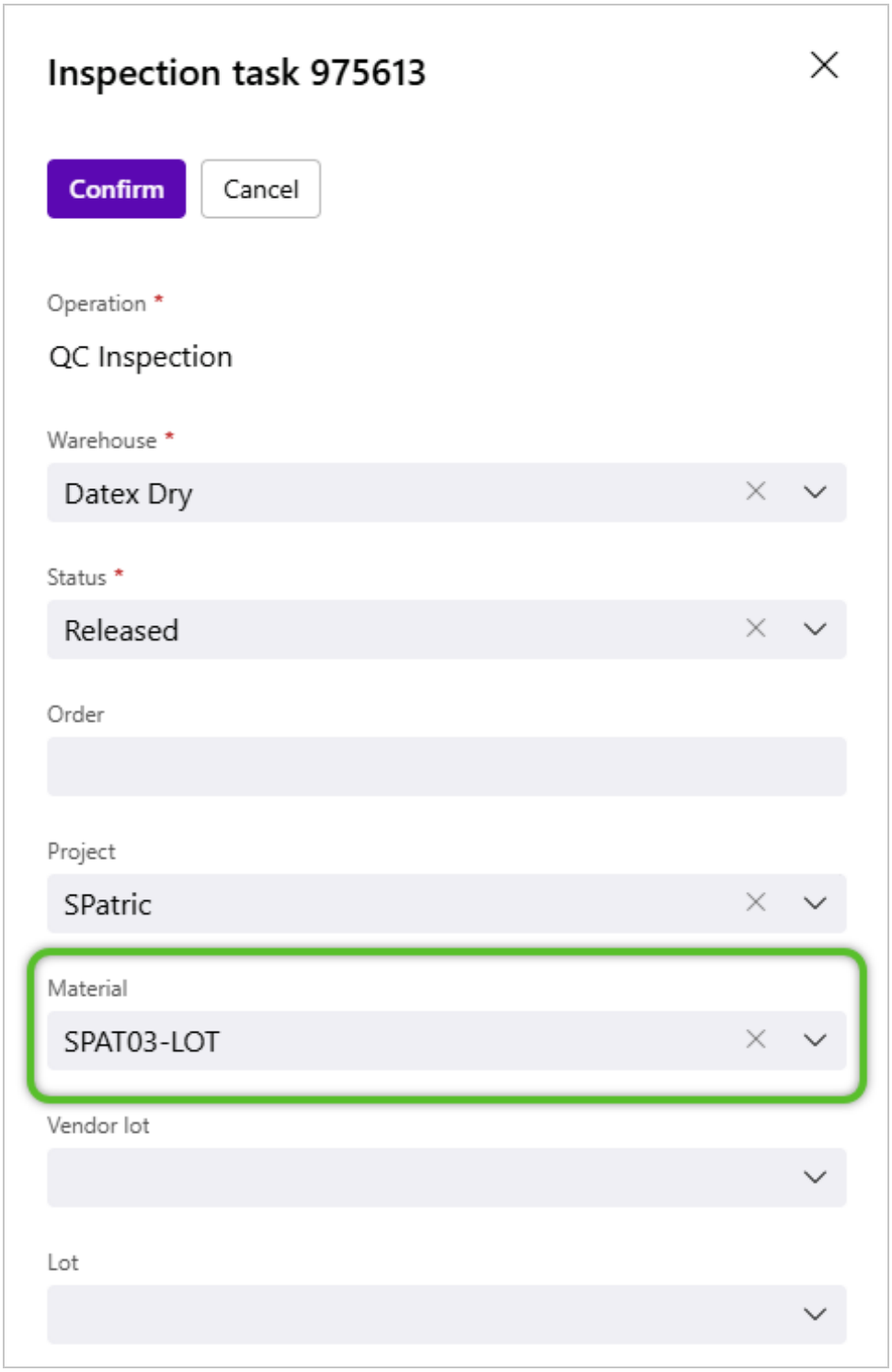
4. When necessary, assign the new **Inspection Task** to a specific **Order** or **Orders**.



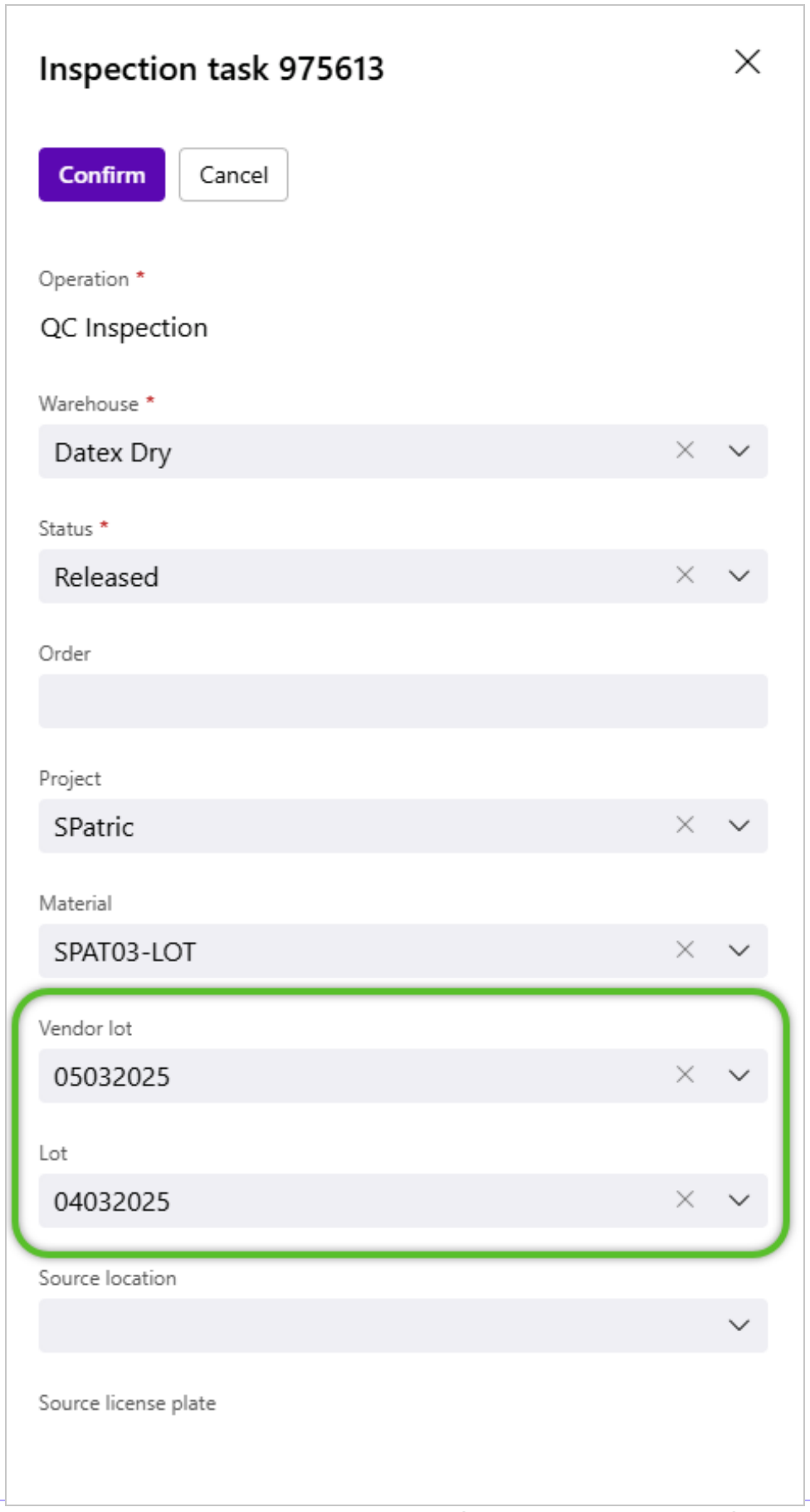
5. (Optional) Specify a single **Project** to which this new **Inspection Task** will be available. When a **Project** is selected here, the **Inspection Task** will not be available for other **Projects**.



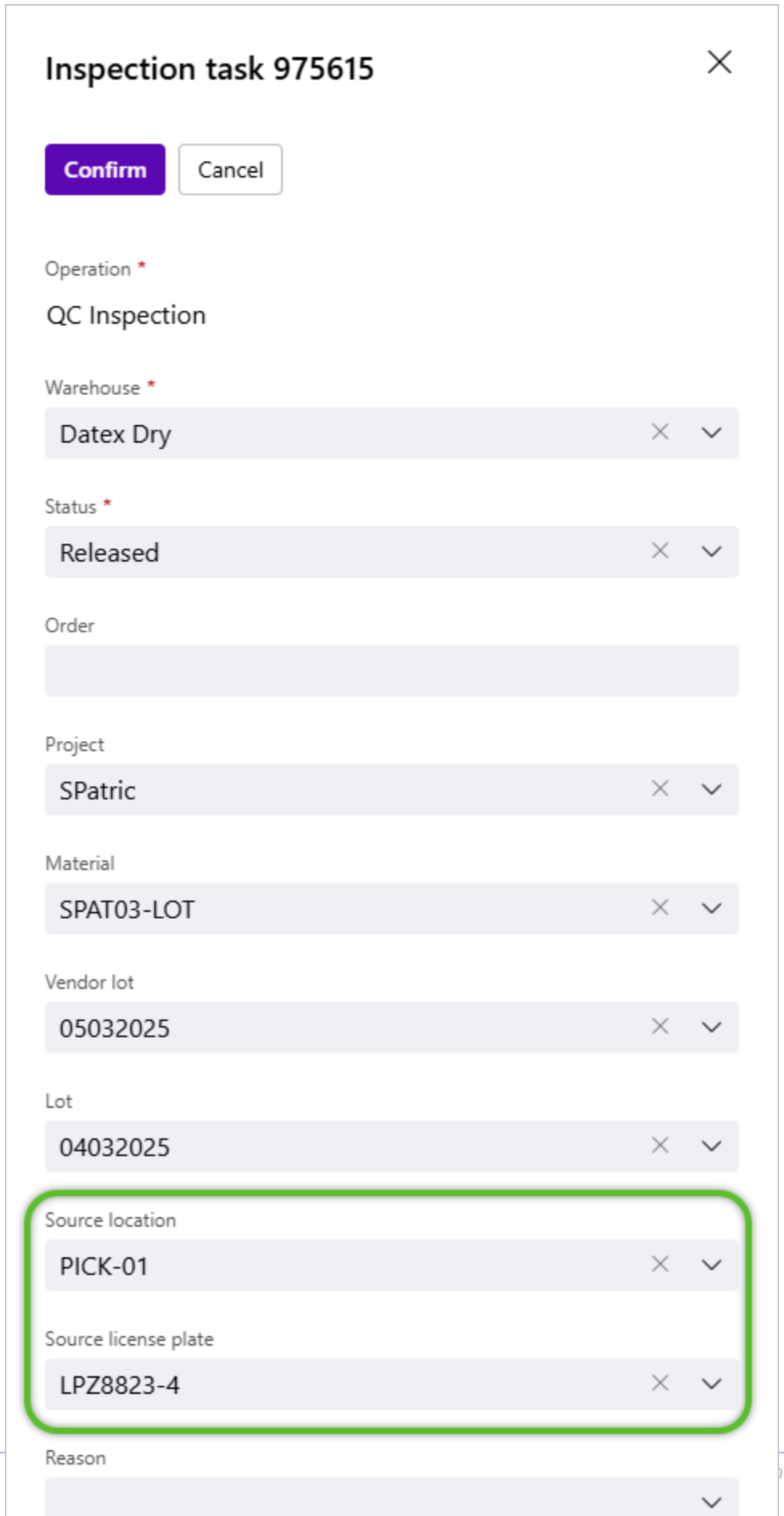
6. (Optional) Specify a **Material** to which this new **Inspection Task** will apply. When a **Material** is selected here, the **Inspection Task** will no be available for other **Materials** in the **Project**.



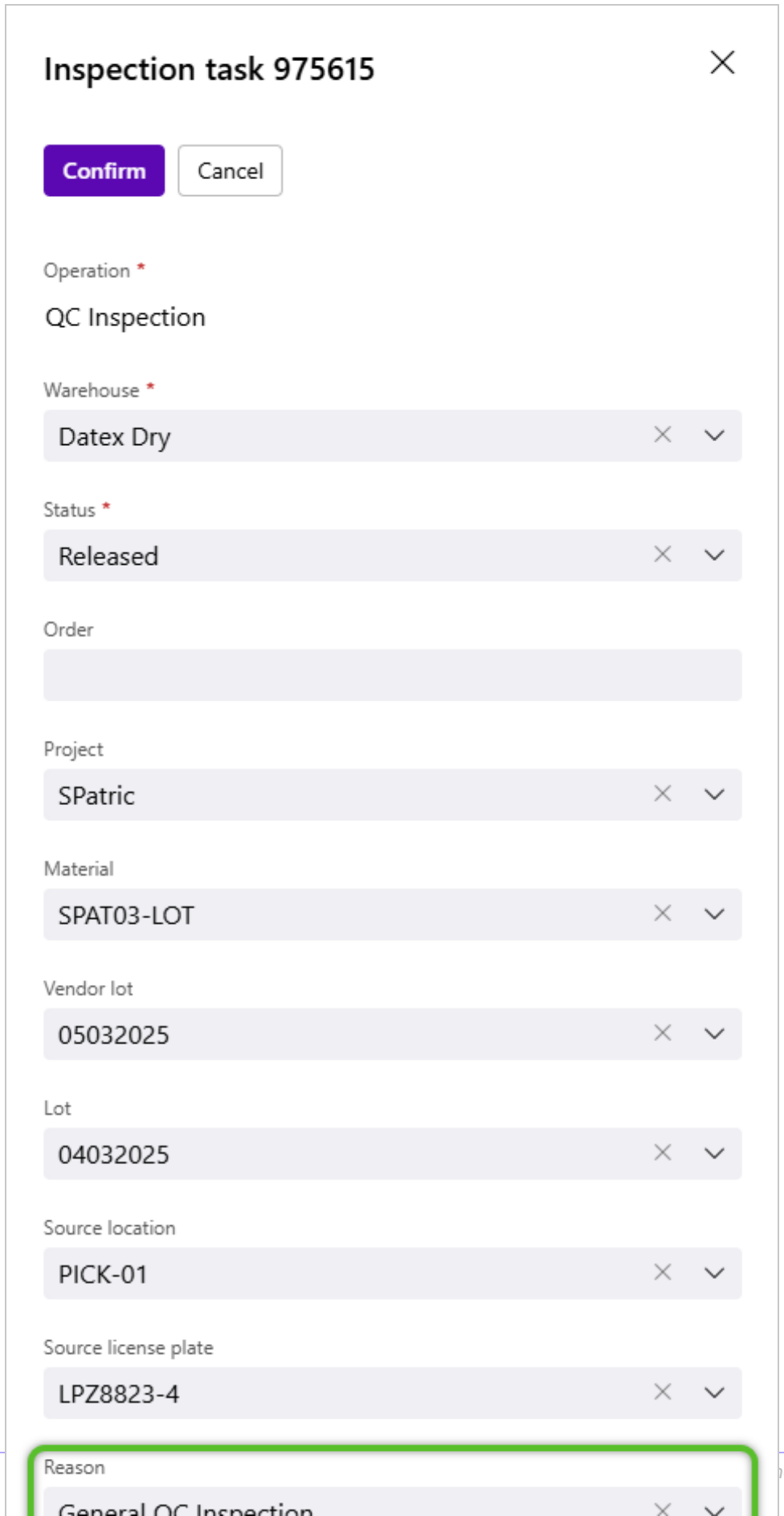
7. (Optional) Select a **Vendor Lot** and **Lot**.


Inspection task 975613
Confirm
Cancel
Operation *
QC Inspection
Warehouse *
Datex Dry
Status *
Released
Order
Project
SPatric
Material
SPAT03-LOT
Vendor lot
05032025
Lot
04032025
Source location
Source license plate

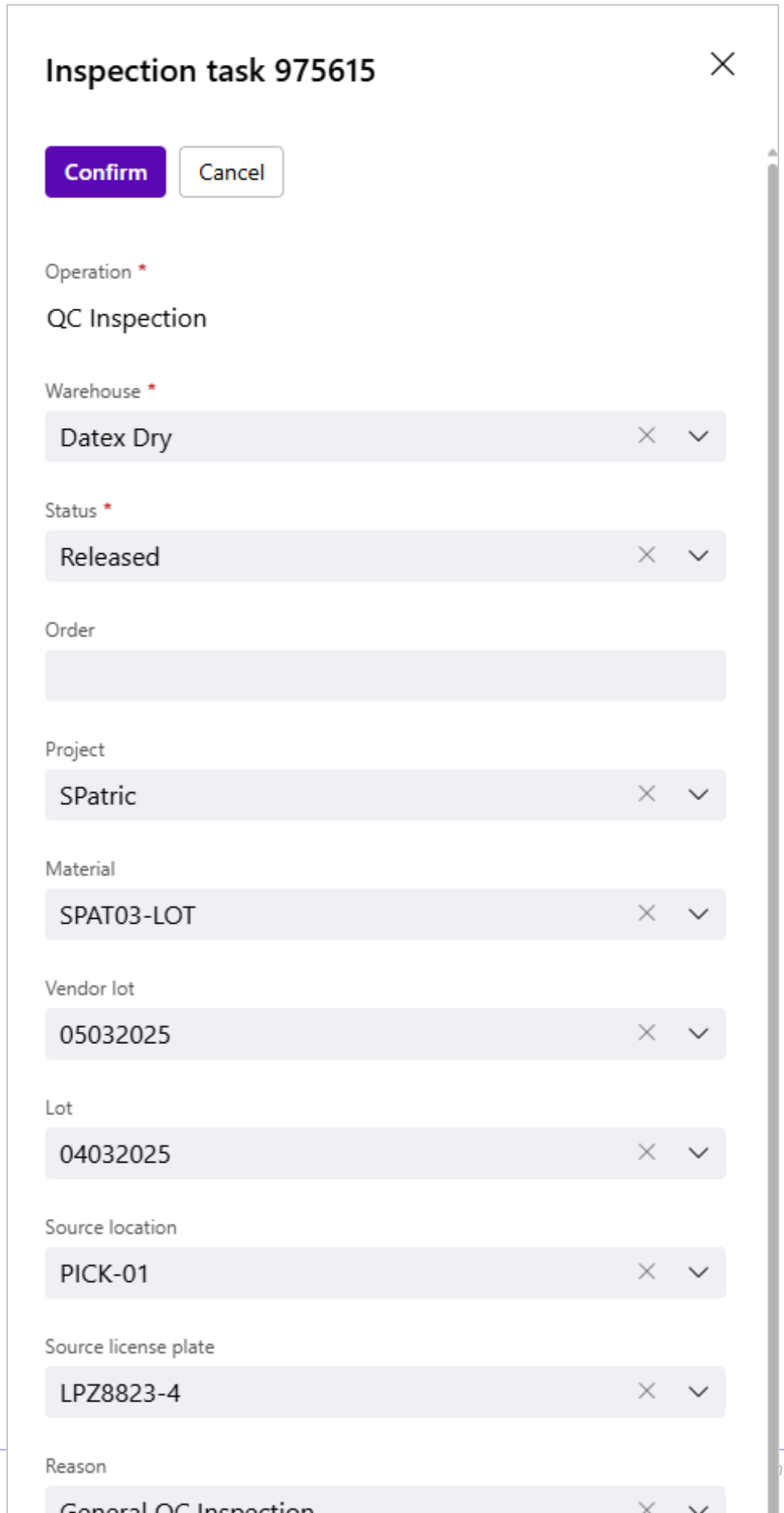
8. (Optional) Select a **Source Location** and specify a **Source License Plate**.


Inspection task 975615
Confirm
Cancel
Operation *
QC Inspection
Warehouse *
Datex Dry
Status *
Released
Order
Project
SPatric
Material
SPAT03-LOT
Vendor lot
05032025
Lot
04032025
Source location
PICK-01
Source license plate
LPZ8823-4
Reason

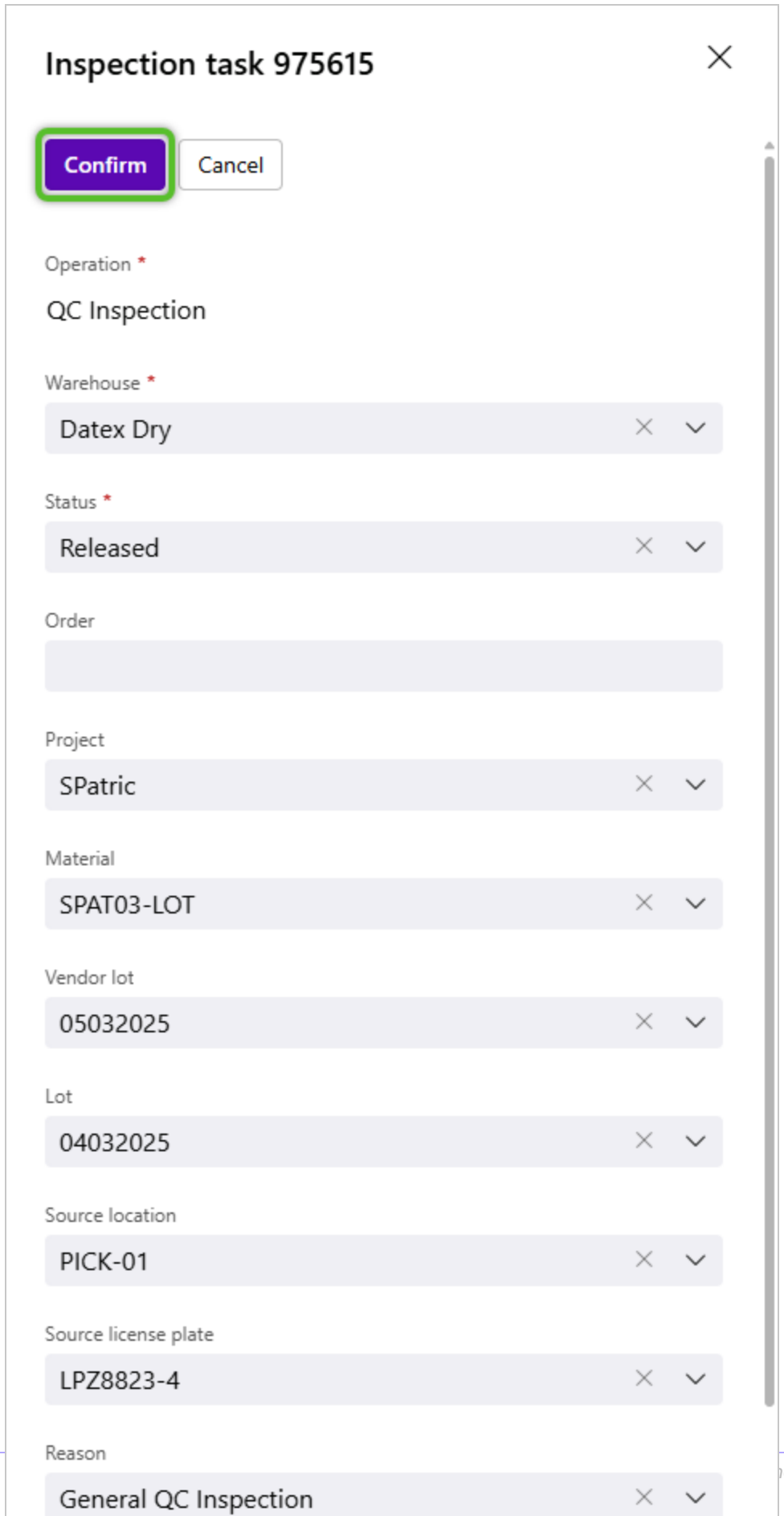
9. (Optional) Select a **Reason** for the new **Inspection Task**.


Inspection task 975615
Confirm
Cancel
Operation *
QC Inspection
Warehouse *
Datex Dry
Status *
Released
Order
Project
SPatric
Material
SPAT03-LOT
Vendor lot
05032025
Lot
04032025
Source location
PICK-01
Source license plate
LPZ8823-4
Reason
General QC Inspection

10. (Optional) Enter any **Notes** for the **Inspection Task**.


Inspection task 975615
Confirm
Cancel
Operation *
QC Inspection
Warehouse *
Datex Dry
Status *
Released
Order
Project
SPatric
Material
SPAT03-LOT
Vendor lot
05032025
Lot
04032025
Source location
PICK-01
Source license plate
LPZ8823-4
Reason

11. Click the **Confirm** button in the top left corner of the window to save the new **Inspection Task**.


Inspection task 975615
Confirm
Cancel
Operation *
QC Inspection
Warehouse *
Datex Dry
Status *
Released
Order
Project
SPatric
Material
SPAT03-LOT
Vendor lot
05032025
Lot
04032025
Source location
PICK-01
Source license plate
LPZ8823-4
Reason
General QC Inspection

Billing Guide

Sections

- Overview
- Billing Contracts
- Billing Records
- Invoices
- Work Orders
- Auto-Invoicing

Overview

The **Billing** menu is where everything related to Billing is set up and managed. Users can review and manage all Billing-related options from the following Hubs (submenus): Billing Contracts, Billing Records, Invoices, Work Orders, and Auto-Invoicing Rules.

Contracts should be set up for each Owner and Project. This allows Billing Records to be generated and their associated Invoices to be created based on those Billing Records. Work Orders can also be managed here.

Please Note

- **Operation Codes**, **Billing Strategies**, **Terms**, **Currencies**, and **Tax Schedules** must already be configured.
- Billing Contracts can be used along with external accounting software.

For assistance managing these billing presets or setting up external Billing, please contact Datex.

Billing Contracts Hub

Billing Contracts determine how much Owners are charged for your services. Each Project requires it's own Contract, and can only have one active Contract at a time. Creating a Billing Contract involves adding Contract Lines. Every billable Activity or Task will have a Contract Line set up for it. To save time, Billing Contracts can be Copied and edited before activation. A Contract must be activated before it is able to begin creating Billing Records.

The **Billing Contracts Hub** contains details about all Billing Contracts. Icons in the top toolbar allows users to **Creating a Billing Contract** and **Manage Billing Codes**. Billing Contracts can be filtered by Owner, Project, Status, and Expiring Contracts.

The **Billing Contracts tab** displays Contracts in descending order, starting with the most recently created first. Clicking the purple Contract **ID** link opens the **Contract** for further review and management. The Billing Contracts tab toolbar provides options to **Copy**, Activate, **Deactivate**, Delete, and Export selected Contracts.

Billing Contracts Hub Details

Status:	The status of the Contract.
ID:	The system-generated ID number for the Contract.
Name:	The name of the Contract.
Owner:	The Owner for the Contract.
Project:	The Project for the Contract.
Days Remaining:	The number of days remaining in the Contract.
Start Date:	The date and time when the Contract took effect in the system.
End Date:	The date and time when the Contract is set to end.
Auto Renewal:	The frequency the Contract will auto-renew, if auto-renewal is enabled.
Modified Date:	The date and time when the Contract was last modified.
Modified By:	The user who made the last Contract modification.
Notes:	Any notes in the system for the Contract.

*Those in red are required fields.

Billing Contracts

The Billing Contract is where all Contract details are specified and Contract Lines are added. The top toolbar offers options to Save, Edit, Activate, **Deactivate**, or **Copy** the Contract with all Lines intact. When copying a Contract, a different Owner and Project can be selected, allowing it to serve as a Contract template.

Billing Contract Information

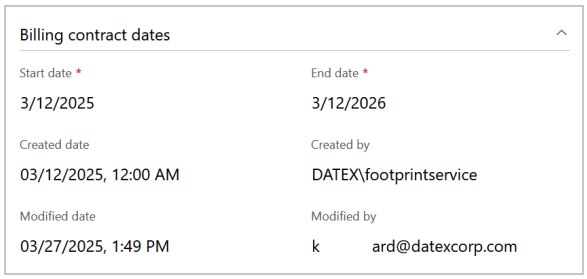
Billing Contract Basics

ID:	The system-generated ID number for the Contract.
Name:	The name for the Contract.
Owner:	The Owner selected for the Contract.
Project:	The Project selected for the Contract.
Status:	The system-generated current status of the Contract.
Billing Terms:	The selected Billing Term(s) for the Contract.

Billing Contract Dates

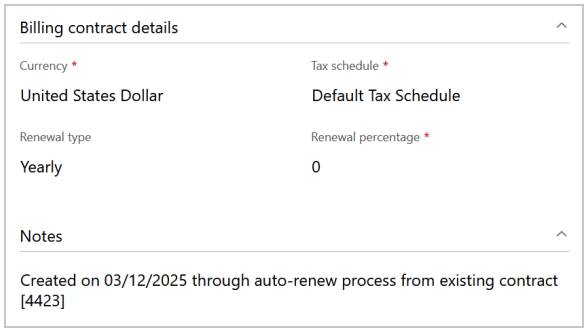
An Active Contract is used by the system to create **Billing Records** for the Owner and Project, and it will remain Active until the End date is reached, or it is manually Deactivated. Only one Contract can be Active per Project for a given time. If no Contracts are Active for a Project, that Project will generate no Billing Records.

A second contract for a Project can be created with an **Effective Start Date** set to the day after the **End Date** of the first contract, and left unactivated so the system will automatically switch over to the new Contract on its **Start Date**. Auto-renewal can also be set up to automatically create a new contract after the active contract expires.



Start Date: The date and time when the Contract took effect.
End Date: The date and time when the Contract is set to end.
Created Date: The date and time when the Contract was created.
Created By: The user who created the Contract.
Modified Date: The date and time when the Contract was last modified.
Modified By: The user who made the last Contract modification.

Billing Contract Details



Currency: The currency the Contract is using.
Tax Schedule: The tax schedule the Contract is using.
Renewal Type: The renewal period for Automatic Contract Renewal - yearly,

	quarterly, monthly, or semi-annually.
Renewal Percentage:	The percentage by which contract rates will adjust up or down when a new contract is generated by Contract Auto-Renewal. To create a decrease in percentage utilize a **"-" (minus)** sign.
Notes:	Any notes in the system for the Contract.

Billing Contract Tabs

Contract Lines are where you set up each specific charge in the Contract. The **Billing Aggregation Strategies** currently available for adding Contract Lines in Footprint are grouped into seven tabs. Each Contract can have multiple Lines added to one or more of these tabs described below. Keep in mind that all Contract Lines created here will be active, and duplicate Billing can take place if there are multiple Lines set up to bill for the same things.

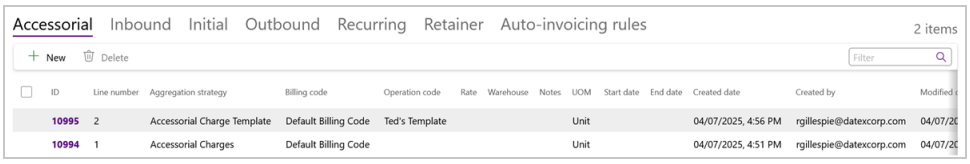
The **New** button opens the Billing Contract Line Wizard, which guides users through defining the particulars for a new Contract Line. Clicking a purple Contract Line **ID** allows for review of and edits to an existing Line's Billing Rates information in the wizard window. Contract Lines can be deleted by selecting them and clicking the **Delete** option in the tab toolbar.

❑Note

Upon saving an edit to an active Contract Line, users will be prompted to "Apply rate change to un-invoiced billing records?". Selecting **Yes** recalculates all un-invoiced Billing Records with the new rates, effectively backdating the change to the last invoice. Selecting **No** keeps all previously generated Billing Records as-is, and only new Billing Records will reflect the change. Also, only the **Rates** will be recalculated; any changes to the **Ranges** or **Minimums** will only effect future Billing Records.

Accessorial

This strategy allows the set up of rates for Accessorial Charges or the use of an Accessorial Charges Template. Each different Accessorial Charge can have a specific Contract Line written for it, or, if you leave the Operation Code field blank, the Contract Line will apply to all Accessorial Charges.



❑Note

Make sure all the necessary, specific Accessorial Charge Billing Strategies are setup before setting up a generic one for all Accessorial Charges; that way, the Billing Strategy without a specified Operation Code will apply to all Accessorial Charges not covered in the pre-existing Contract Lines.

Contract Line Information

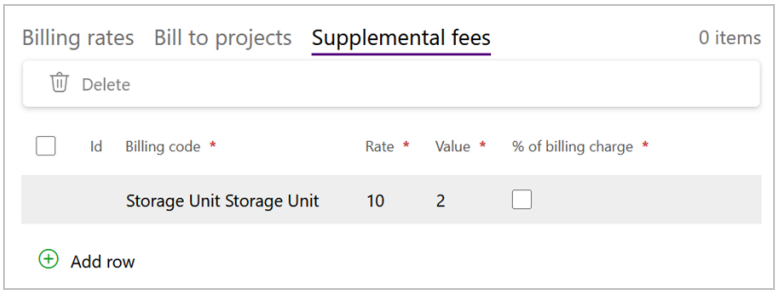
ID:	The Contract Line ID is generated when the Line is created and cannot be updated.
Line Number:	The Contract Line number, determined by the order in which the Contract Lines were added. This can be changed if desired.
Aggregation Strategy:	The Billing Aggregation Strategy selected for this Contract Line.
Accessorial Charge Template:	The Accessorial Charge Template selected for this Contract Line, if the selected Aggregation Strategy is Accessorial Charge Template.
Billing Code:	The Billing Code selected for this Contract Line.
Operation Code:	The Operation Code (Accessorial Charge) selected for this Contract Line. When the Operation Code field is left blank, the Contract Line will apply to all Accessorial Charges.
Rate:	The rate set for this Contract Line.
Warehouse:	The warehouse where this Contract Line applies.
Notes:	Any notes in the system for the Contract Line.
UOM:	The Unit by which the charge for this Contract Line is Measured.
Start Date:	The date and time when the Contract Line took effect.
End Date:	The date and time when the Contract Line is set to end.
Created Date:	The date and time when the Contract Line was created.
Created By:	The user that created the Contract Line.
Modified Date:	The date and time when the Contract Line was last modified.
Modified By:	The user that last modified the Contract Line.

Rate Information

Rate:	The rate at which the Line is charged (specifically for the Range listed).
Minimum Charge:	The minimum amount to be charged when charging for this Contract Line.
Range Start:	The starting point at which this rate will be charged, measured by the Contract Line's Unit of Measurement.
Range End:	The end point at which this rate will be charged, measured by the Contract Line's Unit of Measurement.

(Optional) Add Supplemental Fees

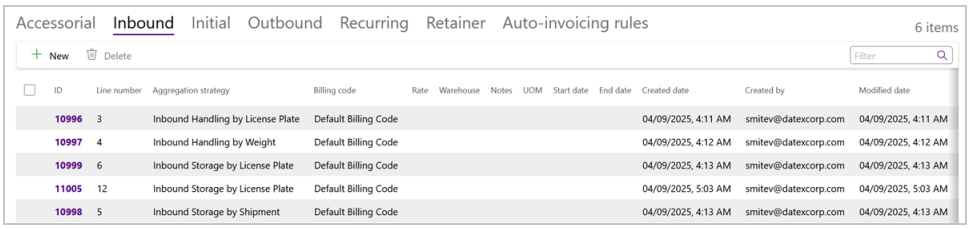
Supplemental fees can be created for this contract line, and defined by either a flat value per instance of the Billing Charge, or by a percentage of the in question.



ID:	The Contract Line Supplemental Fee ID is generated when the fee is created and cannot be updated.
Billing Code:	The Billing Code selected for this Supplemental Fee.
Rate:	The rate at which the Supplemental Fee is charged.
Value:	The amount of times the rate will be applied per instance of the billing code. For example, if the Rate is 10 and this Value is 2, then $20 will be applied per instance of the Supplemental Fee.
% of Billing Charge:	Indicates whether or not the value is a flat amount or a % of the Billing Charge. For example, if the Rate is 10, the Value is 2, and this % of Billing Charge is enabled with 50, then a billing record would be generated for $10.00 (10*2*.50).

Inbound

Inbound handling and storage strategies allow rates to be set for inventory being received into the warehouse. The storage strategy will charge customers a one-time fee for storing their inventory. Each individual line set up will apply.



Contract Line Information

ID: The Contract Line ID is generated when the Line is created and cannot be updated.

Line Number: The Contract Line Number, determined by the order in which the Contract Lines were added. This can be changed if desired.

Aggregation Strategy: The Billing Aggregation Strategy selected for this Contract Line.

Billing Method: The Billing Method selected for this Contract Line. Options include:

- **Gross (Shipping) Volume**: The system will calculate the Gross Volume based on the Material's Packaging and the Containers used, and bill by that.
- **Gross (Shipping) Weight**: The system will calculate the Gross Weight of based on the Material's Packaging and the Containers used, and bill by that.
- **Inventory Quantity**: Bill by the number of units of inventory.
- **Net Volume**: The system will calculate the New Volume of all Inventory in a Shipment based on the Material's Packaging, and bill by that.
- **Net Weight**: The system will calculate the New Weight of all Inventory in a Shipment based on the Material's Packaging, and bill by that.
- **Static Quantity**: Bill by a set number of License Plates.

Billing Code: The Billing Code selected for this Contract Line.

Rate: The rate set for this Contract Line.

Warehouse: The warehouse where this Contract Line applies.

Notes: Any notes in the system for the Contract Line.

UOM: The Unit by which the charge for this Contract Line is Measured.

Start Date: The date and time when the Contract Line took effect.

End Date: The date and time when the Contract Line is set to end.

Base Package Conversion: When enabled, the Contract Line is set up to convert the packaging of the material(s) specified in the Line to their Base Packaging Type, so that they are charged per individual unit.

Date Range: Determines the monthly date range when this Contract Line is billed (1st - 15th, 16th - 31st, or the entire month).

Material Group: Allows for the billing strategy to be applied to only the Material

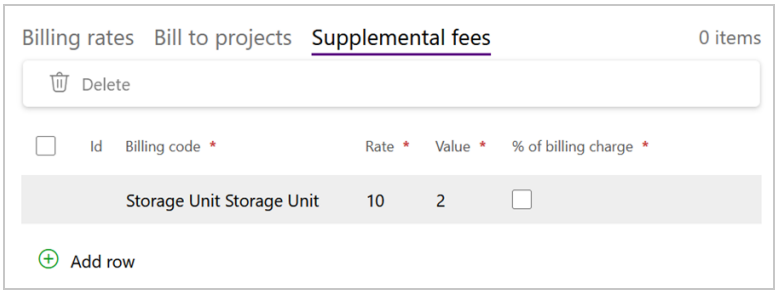
	Group selected.
Material Package:	Allows for the billing strategy to be applied to only the Material Packaging selected.
Material Tags:	Allows for the billing strategy to be applied to only the Material Tag (s) selected.
Created Date:	The date and time when the Contract Line was created.
Created By:	The user that created the Contract Line.
Modified Date:	The date and time when the Contract Line was last modified.
Modified By:	The user that last modified the Contract Line.

Rate Information

Rate:	The rate at which the Line is charged (specifically for the Range listed).
Minimum Charge:	The minimum amount to be charged when charging for this Contract Line.
Range Start:	The starting point at which this rate will be charged, measured by the Contract Line's Unit of Measurement.
Range End:	The end point at which this rate will be charged, measured by the Contract Line's Unit of Measurement.

(Optional) Add Supplemental Fees

Supplemental fees can be created for this contract line, and defined by either a flat value per instance of the Billing Charge, or by a percentage of the in question.

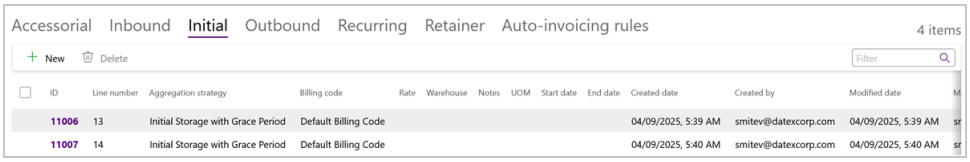


ID:	The Contract Line Supplemental Fee ID is generated when the fee is created and cannot be updated.
Billing Code:	The Billing Code selected for this Supplemental Fee.
Rate:	The rate at which the Supplemental Fee is charged.
Value:	The amount of times the rate will be applied per instance of the billing code. For example, if the Rate is 10 and this Value is 2, then $20 will be applied per instance of the Supplemental Fee.

% of Billing Charge:	Indicates whether or not the value is a flat amount or a % of the Billing Charge. For example, if the Rate is 10, the Value is 2, and this % of Billing Charge is enabled with 50, then a billing record would be generated for $10.00 (10*2*.50).

Initial

The **Initial** strategy allows a one-time rate to be set for initial inventory charges. Each individual line set up will apply.



Contract Line Information

ID:	The Contract Line ID is generated when the Line is created and cannot be updated.
Line Number:	The Contract Line Number, determined by the order in which the Contract Lines were added. This can be changed if desired.
Aggregation Strategy:	The Billing Aggregation Strategy selected for this Contract Line.
Billing Object:	The Billing Object selected for this Contract Line (Lot, License Plate Lot, or Shipment).
Billing Method:	The Billing Method selected for this Contract Line. Options include: • **Gross (Shipping) Volume**: The system will calculate the Gross Volume based on the Material's Packaging and the Containers used, and bill by that. • **Gross (Shipping) Weight**: The system will calculate the Gross Weight of based on the Material's Packaging and the Containers used, and bill by that. • **Inventory Quantity**: Bill by the number of units of inventory. • **Net Volume**: The system will calculate the New Volume of all Inventory in a Shipment based on the Material's Packaging, and bill by that. • **Net Weight**: The system will calculate the New Weight of all Inventory in a Shipment based on the Material's Packaging, and bill by that. • **Static Quantity**: Bill by a set number of License Plates.
Billing Code:	The Billing Code selected for this Contract Line.
Rate:	The rate set for this Contract Line.

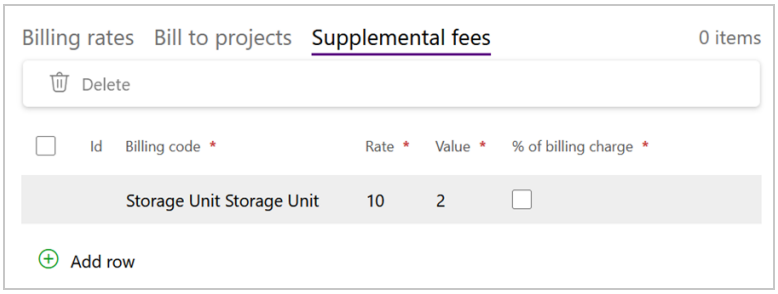
Warehouse:	The warehouse where this Contract Line applies.
Notes:	Any notes in the system for the Contract Line.
UOM:	The Unit by which the charge for this Contract Line is Measured.
Start Date:	The date and time when the Contract Line took effect.
End Date:	The date and time when the Contract Line is set to end.
Base Package Conversion:	When enabled, the Contract Line is set up to convert the packaging of the Material(s) specified in the Line to their Base Packaging Type, so that they are charged per individual unit.
Date Range:	Determines the monthly date range when this Contract Line is billed (1st - 15th, 16th - 31st, or the entire month).
Days Remaining:	The number of days remaining in the Grace Period (month, quarter, year, or none).
Initiating Date:	When the grace period begins (Shipment Complete Date, Shipment Arrival Date, or First Completed Receiving Task Date).
Grace Period Option:	The grace period option (days, weeks, or none).
Grace Period Value:	The number of days/weeks included in the grace period, determined by the Grace Period Option selected.
Material Group:	Allows for the billing strategy to be applied to only the Material Group selected.
Material Package:	Allows for the billing strategy to be applied to only the Material Packaging selected.
Location Tags:	Allows for the billing strategy to be applied to only the Location Tag (s) selected.
Created Date:	The date and time when the Contract Line was created.
Created By:	The user that created the Contract Line.
Modified Date:	The date and time when the Contract Line was last modified.
Modified By:	The user that last modified the Contract Line.

Rate Information

Rate:	The rate at which the Line is charged (specifically for the Range listed).
Minimum Charge:	The minimum amount to be charged when charging for this Contract Line.
Range Start:	The starting point at which this rate will be charged, measured by the Contract Line's Unit of Measurement.
Range End:	The end point at which this rate will be charged, measured by the Contract Line's Unit of Measurement.

(Optional) Add Supplemental Fees

Supplemental fees can be created for this contract line, and defined by either a flat value per instance of the Billing Charge, or by a percentage of the in question.



ID: The Contract Line Supplemental Fee ID is generated when the fee is created and cannot be updated.

Billing Code: The Billing Code selected for this Supplemental Fee.

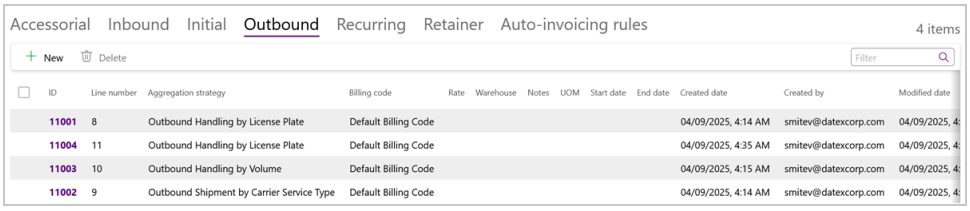
Rate: The rate at which the Supplemental Fee is charged.

Value: The amount of times the rate will be applied per instance of the billing code. For example, if the Rate is 10 and this Value is 2, then $20 will be applied per instance of the Supplemental Fee.

% of Billing Charge: Indicates whether or not the value is a flat amount or a % of the Billing Charge. For example, if the Rate is 10, the Value is 2, and this % of Billing Charge is enabled with 50, then a billing record would be generated for $10.00 (10*2*.50).

Outbound

Outbound handling and shipment by carrier strategies allow rates to be set for inventory being shipped out of the warehouse. The shipment by carrier strategy will bill based on specific carrier service types for outbound shipments. Each individual line set up will apply.



Contract Line Information

ID: The Contract Line ID is generated when the Line is created and cannot be updated.

Line Number: The Contract Line Number, determined by the order in which the

	Contract Lines were added. This can be changed if desired.
Aggregation Strategy:	The Billing Aggregation Strategy selected for this Contract Line.
Billing Method:	The Billing Method selected for this Contract Line. Options include: • **Gross (Shipping) Volume**: The system will calculate the Gross Volume based on the Material's Packaging and the Containers used, and bill by that. • **Gross (Shipping) Weight**: The system will calculate the Gross Weight of based on the Material's Packaging and the Containers used, and bill by that. • **Inventory Quantity**: Bill by the number of units of inventory. • **Net Volume**: The system will calculate the New Volume of all Inventory in a Shipment based on the Material's Packaging, and bill by that. • **Net Weight**: The system will calculate the New Weight of all Inventory in a Shipment based on the Material's Packaging, and bill by that. • **Static Quantity**: Bill by a set number of License Plates.
Billing Code:	The Billing Code selected for this Contract Line.
Rate:	The rate set for this Contract Line.
Base Package Conversion:	When enabled, the Contract Line is set up to convert the packaging of the Material(s) specified in the Line to their Base Packaging Type, so that they are charged per individual unit.
Date Range:	Determines the monthly date range when this Contract Line is billed (1st - 15th, 16th - 31st, or the entire month).
Material Group:	Allows for the billing strategy to be applied to only the Material Group selected.
Material Package:	Allows for the billing strategy to be applied to only the Material Packaging selected.
Material Tags:	Allows for the billing strategy to be applied to only the Material Tag (s) selected.
Service Type Method:	The Carrier Service Type Method to which the Contract Line applies. • **Full Truck Load**: Charges per Shipment. • **Less Than Truck Load**: Charges per License Plate in the Shipment. • **Package**: Charges per individual piece of Inventory in the Shipment.
Carrier Service Type:	The Carrier Service Type to which the Contract Line applies.
Warehouse:	The warehouse where this Contract Line applies.

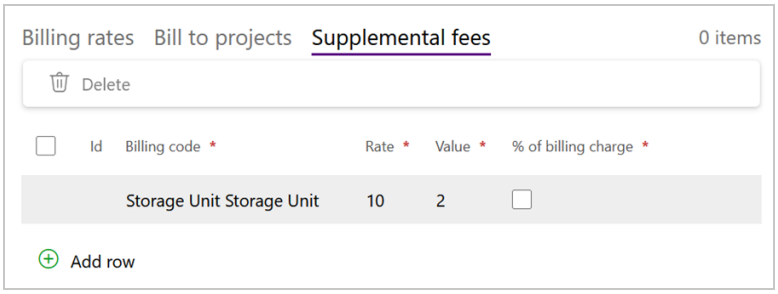
Notes:	Any notes in the system for the Contract Line.
UOM:	The Unit by which the charge for this Contract Line is Measured.
Start Date:	The date and time when the Contract Line took effect.
End Date:	The date and time when the Contract Line is set to end.
Created Date:	The date and time when the Contract Line was created.
Created By:	The user that created the Contract Line.
Modified Date:	The date and time when the Contract Line was last modified.
Modified By:	The user that last modified the Contract Line.

Rate Information

Rate:	The rate at which the Line is charged (specifically for the Range listed).
Minimum Charge:	The minimum amount to be charged when charging for this Contract Line.
Range Start:	The starting point at which this rate will be charged, measured by the Contract Line's Unit of Measurement.
Range End:	The end point at which this rate will be charged, measured by the Contract Line's Unit of Measurement.

(Optional) Add Supplemental Fees

Supplemental fees can be created for this contract line, and defined by either a flat value per instance of the Billing Charge, or by a percentage of the in question.

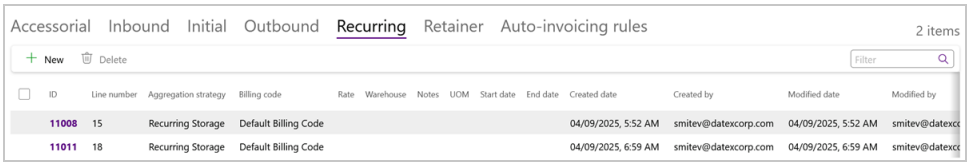


ID:	The Contract Line Supplemental Fee ID is generated when the fee is created and cannot be updated.
Billing Code:	The Billing Code selected for this Supplemental Fee.
Rate:	The Rate at which the Supplemental Fee is charged.
Value:	The amount of times the rate will be applied per instance of the billing code. For example, if the Rate is 10 and this Value is 2, then $20 will be applied per instance of the Supplemental Fee.

% of Billing Charge:	Indicates whether or not the value is a flat amount or a % of the Billing Charge. For example, if the Rate is 10, the Value is 2, and this % of Billing Charge is enabled with 50, then a billing record would be generated for $10.00 (10*2*.50).

Recurring

This strategy bills a charge for storage of Inventory in the warehouse, on a daily, weekly, or monthly basis.



Contract Line Information

ID:	The Contract Line ID is generated when the Line is created and cannot be updated.
Line Number:	The Contract Line Number, determined by the order in which the Contract Lines were added. This can be changed if desired.
Aggregation Strategy:	The Billing Aggregation Strategy selected for this Contract Line.
Billing Code:	The Billing Code selected for this Contract Line.
Rate:	The rate set for this Contract Line.
Warehouse:	The warehouse where this Contract Line applies.
Notes:	Any notes in the system for the Contract Line.
UOM:	The Unit by which the charge for this Contract Line is Measured.
Start Date:	The date and time when the Contract Line took effect.
End Date:	The date and time when the Contract Line is set to end.
Billing Object:	The Billing Object selected for this Contract Line. • **Lot**: Charge once for each Lot the customer is storing in the Warehouse. No more detailed information will be considered or reported. • **License Plate Lot**: Charge once for each Lot on each individual License Plate. • **Shipment**: Charge once for each Shipment.
Schedule:	The schedule for this Line item (Anniversary or Predefined).
Frequency:	The frequency at which this rate charge occurs (Daily, Weekly, or Monthly).
Execute Time:	The time of day at which this billing strategy rate executes.

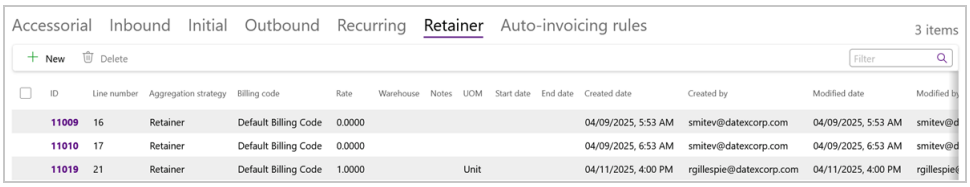
Anniversary Grace Period:	When enabled, allows the grace period to reoccur at the specified grace period.
Advance Billing:	When enabled, allows for advance Billing that executes at 23:59:59.
Grace Period Option:	The Grace Period Option (days, weeks, or none).
Grace Period Value:	The number of days/weeks included in the grace period, determined by the Grace Period Option selected.
Material Group:	Allows for the billing strategy to be applied to only the Material Group selected.
Material Package:	Allows for the billing strategy to be applied to only the Material Packaging selected.
Location Tags:	Allows for the billing strategy to be applied to only the Location Tag (s) selected.
Location Storage Category:	Allows for the billing strategy to be applied to only the Location Storage Category selected.
Created Date:	The date and time when the Contract Line was created.
Created By:	The user that created the Contract Line.
Modified Date:	The date and time when the Contract Line was last modified.
Modified By:	The user that last modified the Contract Line.

Rate Information

Rate:	The rate at which the Line is charged (specifically for the Range listed).
Minimum Charge:	The minimum amount to be charged when charging for this Contract Line.
Range Start:	The starting point at which this rate will be charged, measured by the Contract Line's Unit of Measurement.
Range End:	The end point at which this rate will be charged, measured by the Contract Line's Unit of Measurement.

Retainer

This strategy bills based on a configured Retainer charge, often used for assessing a "down payment" or "minimum" for a type of other charge. Retainer charges are set for a fixed Billing amount and rate, and have a predefined schedule that occurs daily, weekly, or monthly.



Contract Line Information

ID: The Contract Line ID is generated when the Line is created and cannot be updated.

Line Number: The Contract Line Number, determined by the order in which the Contract Lines were added. This can be changed if desired.

Aggregation Strategy: The Billing Aggregation Strategy selected for this Contract Line.

Billing Code: The Billing Code selected for this Contract Line.

Rate: The rate set for this Contract Line.

Warehouse: The warehouse where this Contract Line applies.

Notes: Any notes in the system for the Contract Line.

UOM: The Unit by which the charge for this Contract Line is Measured.

Start Date: The date and time when the Contract Line took effect.

End Date: The date and time when the Contract Line is set to end.

Created Date: The date and time when the Contract Line was created.

Created By: The user that created the Contract Line.

Modified Date: The date and time when the Contract Line was last modified.

Modified By: The user that last modified the Contract Line.

Rate Information

Billing Amount: The number of instances of occurrence of this retainer charge.

Billing Rate: The rate at which the retainer is charged. This rate is multiplied by the Billing Amount number for each instance of the retainer charge.

Frequency: The frequency at which this rate charge occurs (daily, weekly, or monthly).

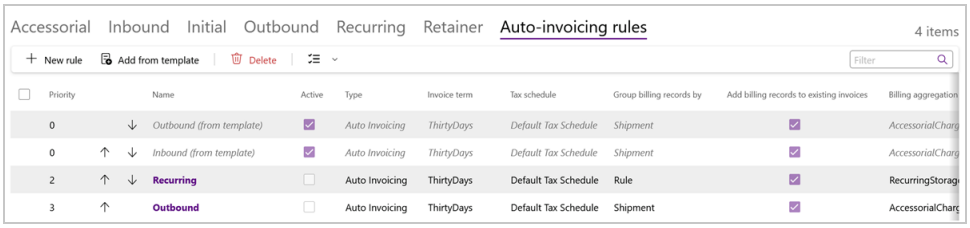
Interval: The interval at which the frequency occurs. For example, if the frequency is daily and the Interval is 3, the rate charge will reoccur every 3 days.

Execute Time: The time of day at which this billing strategy rate executes.

Notes: Any notes for this billing strategy rate.

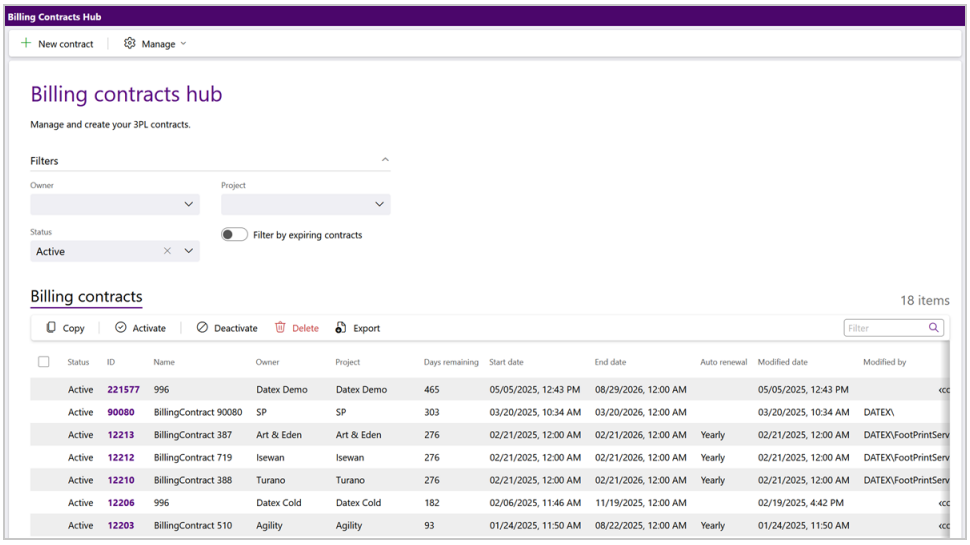
Auto-Invoicing Rules

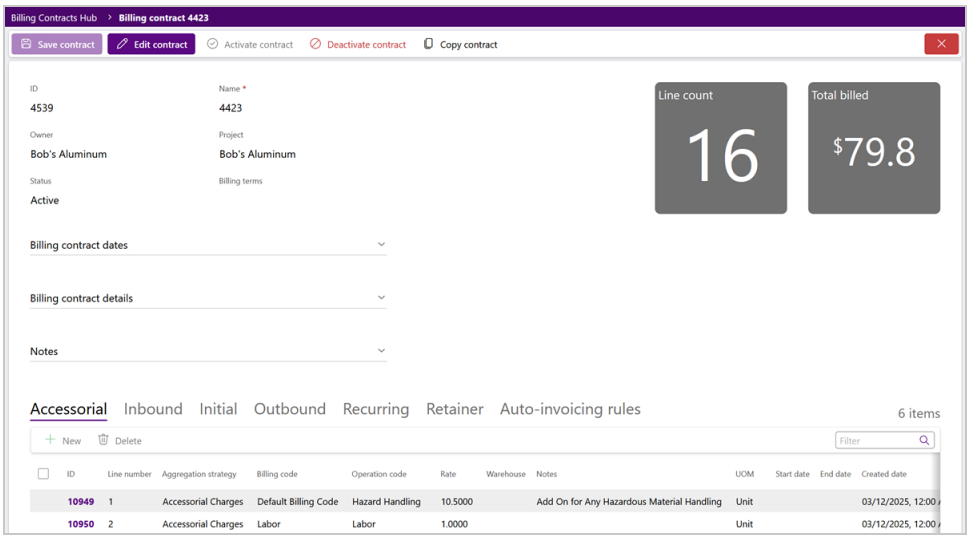
Auto-Invoicing Rules can be added to a contract to ensure efficient and accurate billing.



Auto-Invoicing Rule Information

Priority:	The priority of the Auto-Invoicing Rule.
Name:	The name of the Auto-Invoicing Rule.
Active:	The status of the Auto-Invoicing Rule.
Type:	The type of Auto-Invoicing Rule.
Invoice Term:	The Invoice Term selected for the Auto-Invoicing Rule.
Tax Schedule:	The tax schedule selected for the Auto-Invoicing Rule.
Group Billing Records By:	Indicates how the Billing Records for this Auto-Invoicing Rule are grouped.
Add Billing Records to Existing Invoices:	Indicates whether or not Billing Records for this Auto-Invoicing Rule will be added to existing invoices.
Billing Aggregation Strategies:	The Billing Aggregation Strategies selected for this Auto-Invoicing Rule.
Billing Code(s):	The Billing Code(s) selected for this Auto-Invoicing Rule.
Schedule:	The schedule set for this Auto-Invoicing Rule.





Billing Records Hub

Billing Records are created when any activity related to an active Contract's Lines has taken place. Invoices are created from these Billing Records. Billing Records can only be assigned to one Invoice, and once assigned, will no longer be available for invoicing. When Invoicing, the selected Records can added to a new invoice or assigned to an existing one. Invoicing multiple selected Records allows users to either add one Invoice Line per Record, or to group them onto one Invoice Line.

The **Billing Records Hub** contains details about all Billing Records. Billing Records can be filtered by Owner, Project, Material, and Warehouse, and can include Canceled and Invoiced Records. In the top, right corner are three tiles indicating the number **Invoiced Today**, **Billed Today**, and **Billed This Month**.

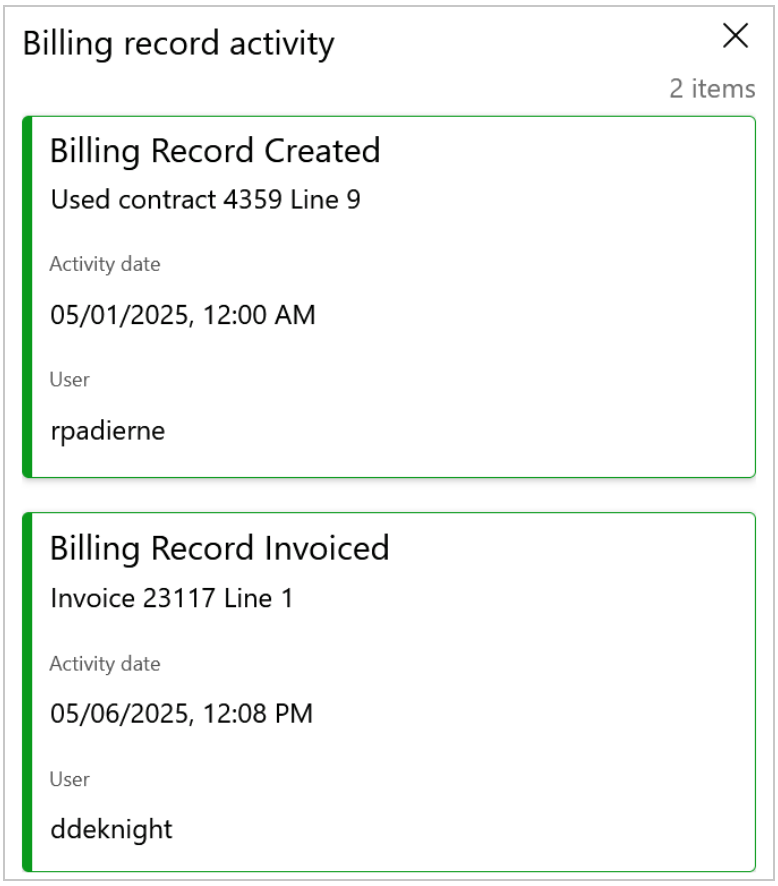
The **Billing Records tab** is in descending order, starting with the most recently created. The Billing Records tab toolbar provides options to **Invoice**, **Cancel**, Delete, and Export selected Records. They can be further filtered by date and Billing Code.

Billing Records Hub Details

Billing Record:	The system-generated ID number for the Billing Record.
Created On:	The date and time when the Billing Record was created.
Billing Code:	The name of the Billing Code the Billing Record is using.
Billing Strategy:	The name of the Contract Line Billing Strategy the Billing Record is associated with.
Operation Code:	The Operation Code associated with the Billing Record, if applicable.
Invoiced:	If the Billing Record is associated with an Invoice, the system-generated Invoice ID and Line number are displayed here.
Amount:	The number of units of work performed for the Billing Record.
UOM:	The Unit of Measure by which the Billing Record is charging.
Rate Minimum Charge:	If a Minimum Charge has been set in the Contract Line associated with the Billing Record, it is displayed here.
Total:	The total charge for the Billing Record.
Owner /Project:	The Owner and Project associated with the Billing Record.
Order:	The Order associated with the Billing Record, if applicable.
Warehouse:	The warehouse the Billing Record is associated with.
Cancelled:	Indicates whether or not the Billing Record has been cancelled.
Cancelled Reason Code:	The reason the Billing Record was cancelled, when applicable.
Notes:	Any notes in the system for the Billing Record.

Billing Record Activity Details

Clicking the purple Record **ID** link opens the Record to review its creation details, and when invoiced, the invoice details.



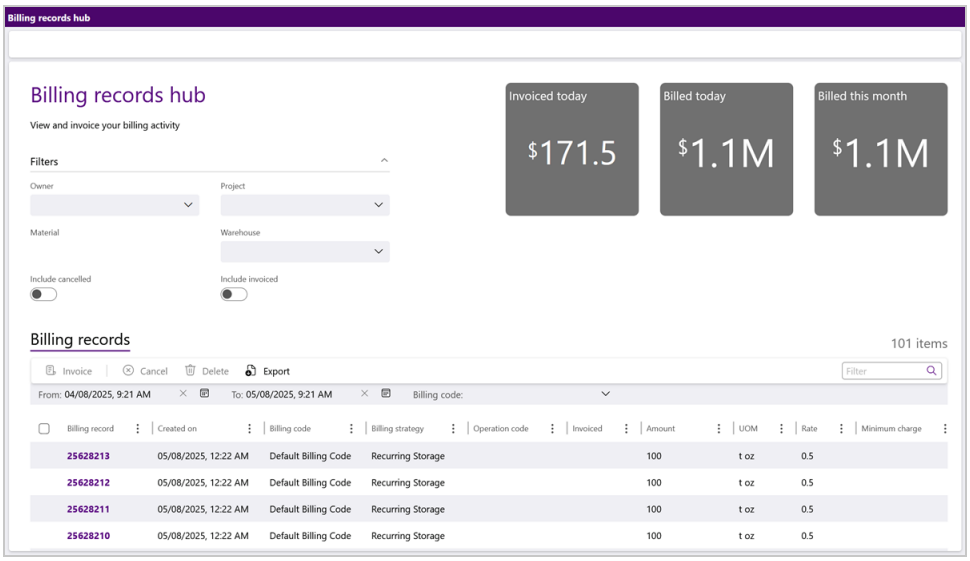
Activity Title: The system activity the Billing Record is associated with.

Contract Line: The Contract number and Line number the Billing Record is based on.

Invoice Line: The Invoice number and Line number the Billing Record is associated with.

Activity Date: The date and time when the activity associated with the Billing Record was completed.

User: The user who created the activity for the Billing Record.



Invoices Hub

Invoices are the actual customer bills. Invoices are based on Billing Records generated by the Contracts that have been setup for each of an Owner's Projects. They can also be created manually by adding or adjusting individual Lines as needed.

The **Invoices Hub** lists all existing Invoices for review and management. Invoices can be **created** and filtered by Owner, Project, and Status. In the top, right corner are two tiles indicating the number of **Total Units** and **Total Billed** amount.

The **Invoices tab** displays Invoices in descending order, starting with the most recently created first. The Invoices tab toolbar provides options to Update, **Complete**, Cancel, Delete, Export for Accounting, manage **Attachments** to, **Print Files** for, and Export a CSV of the selected Invoices.

Invoice Hub Details

❑Note

Once Exported for Accounting, the Invoice can no longer be edited, nor can any of its associated Billing Records be reassigned.

Invoice:	The Invoice number (code).
Status:	The status of the Invoice.
Reference:	Any Reference information for the Invoice.
Total:	The total charge of the Invoice Lines, after taxes, discounts, and freight charges are added.
Owner:	The name of the Owner the Invoice is for.
Project:	The name of the Project the Invoice is for.
Warehouse:	The name of the warehouse the Invoice is associated with.
Shipment:	The shipment ID associated with the Invoice, if applicable.
Due Date:	The date and time when the Invoice Payments are due.
Create:	The date and time when the Invoice was created.
Notes:	Any notes in the system about the Invoice.

Invoices

The Invoice can be opened for further review and management by clicking the purple Invoice number. In the top right corner are two tiles indicating the number of **Total Units** and **Total Billed** amount for the Invoice.

Icons in the top toolbar provide options to Update Status, Cancel, Delete, manage **Attachments**, **Print Files**, Export a CSV, and **View Sent Emails** for the Invoice.

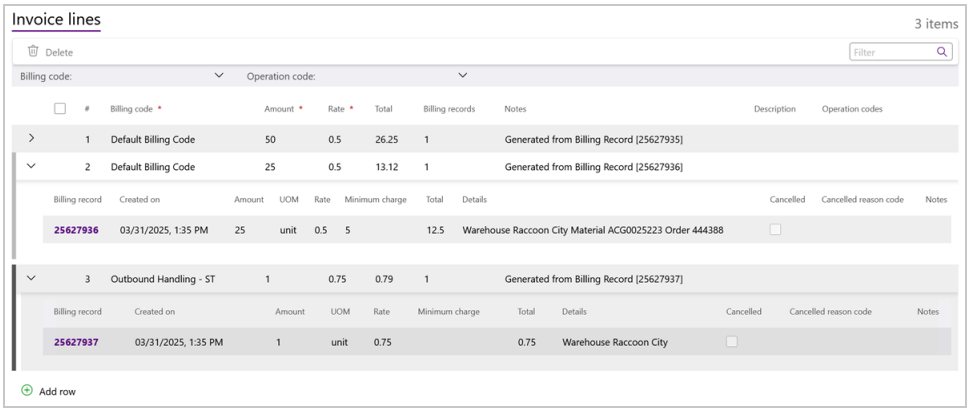
Invoice Details

The Invoice's basic information will be displayed and 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 information for the Invoice.
Attention Of:	Any 'Attention Of' information for the Invoice.
Notes:	Any notes in the system about the Invoice.

Invoice Lines Tab Details

In the **Invoice Lines** tab, the Invoice Line details are displayed. Invoice Lines can be added and deleted. The associated Billing Records can be viewed by clicking the arrow icon next to the Line item.



Invoice Line Details

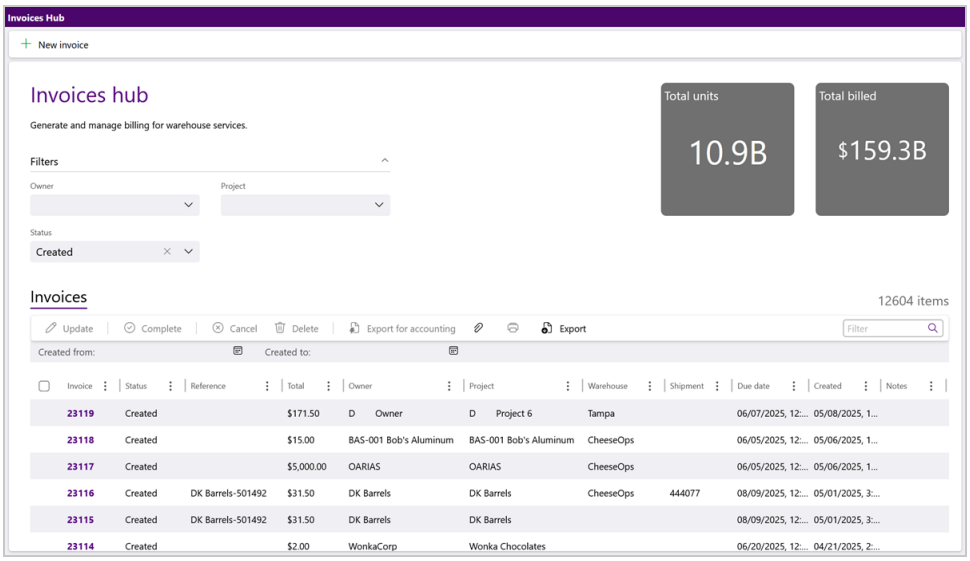
❑Note

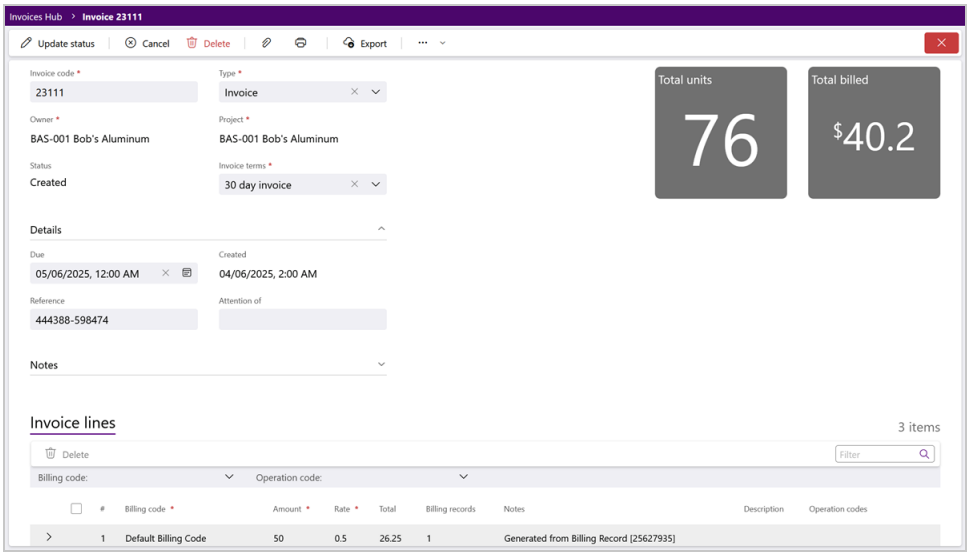
Invoice Lines are rounded according to the standard for financial applications, commonly referred to as "**Bankers Rounding**."

#:	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 being 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.
Operation Codes:	The Operation Codes associated with the Invoice Line.

Billing Record Details

Billing Record:	The system-generated ID number for the Billing Record.
Created On:	The date and time when the Billing Record was created.
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 being charged for the Billing Record.
Minimum Charge:	If a minimum charge has been set in the Contract Line associated with this Billing Record, it is displayed here.
Total:	The total charge for the Invoice Line.
Details:	The warehouse, material, and order number associated with the Billing Record, when applicable.
Cancelled:	Indicates whether or not the Billing Record has been cancelled.
Cancelled Reason Code:	When a Billing Record has been cancelled, the Reason Code is displayed here.
Notes:	Any notes in the system about the Invoice Line.





Work Orders Hub

Work Orders are separate from Inbound and Outbound Orders and do not have to be tied to Shipments. They exist on their own, grouping Accessorial Tasks (simple tasks or procedures that take place in the Warehouse) together and assigning them to a specific Owner and Project. While Work Order tasks can be performed in Footprint or on any Footprint mobile device, the Work Order itself can only be completed from within Footprint. Completing a Work Order closes it out and creates associated Billing Records.

The **Work Orders Hub** allows users to **Create** and manage Work Orders. Work Orders can be filtered by Owner, Project, Warehouse, and Status. In the top, right corner are two tiles indicating the number of **Completed Units Today** and **Open Units Today**.

The **Work Orders tab** lists them in descending order, starting with the most recently created. The Work Orders tab toolbar provides options to Release, **Complete**, Cancel, Delete, **Print Files** for, and manage **Attachments** for the selected Work Orders.

Work Order Hub Details

Work Order:	The Work Order number.
Status:	The status of the Work Order.
Owner / Project:	The Owner and Project associated with the Work Order.
Created:	The date and time when the Work Order was created.
Expected:	The expected date and time of the Work Order's completion.
Warehouse:	The warehouse in which the Work Order is assigned.
Reference:	The reference number for the Work Order.
Description:	A description of the Work Order.
Notes:	Any notes in the system for the Work Order.

Work Orders

The Work Order can be opened for further review and management by clicking the purple Work Order number. In the top right corner are two tiles indicating the **Open Count** and **Completed Count**. Icons along the top provide options to Release, **Complete**, Cancel, **Print Files** for, and manage **Attachments** for the Work Order.

Work Order Details

The Work Order's basic information will be displayed and the **Details** section can be opened for more information about the Work Order.

Work Order Code:	The Work Order number.
Owner:	The Owner associated with the Work Order.
Project:	The Project associated with the Work Order.
Warehouse:	The warehouse in which the Work Order is assigned.
Status:	The status of the Work Order.
Reference:	The reference number for the Work Order.
Expected Date:	The expected date and time of the Work Order's completion.
Description:	A description of the Work Order.
Notes:	Any notes in the system for the Work Order.

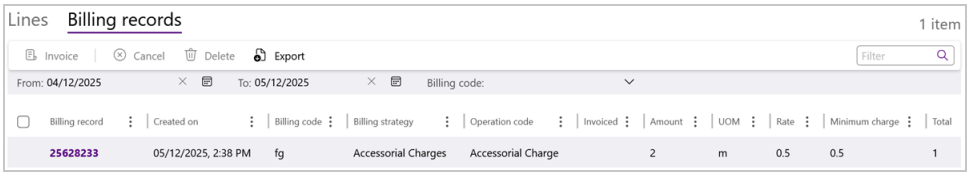
Work Order Lines Tab Details

In the **Lines tab**, the Work Order's tasks are displayed and can be added. Icons in the Lines tab toolbar allows the selected task(s) to be **Completed**, Canceled, Deleted, and the list to be Refreshed. There is a toggle for the option to have the task Auto-complete on Creation.

Operation Code:	A drop-down list of the types of Accessorial Tasks that can be added to the Work Order.
Expected Qty:	The expected amount of work for the task, as measured by the Unit of Measurement.
Actual Qty:	The actual amount of work for the task, as measured by the Unit of Measurement. This is entered once the task has been completed.
UOM:	The Unit of Measurement by which the task will be measured. Defaults based on the Operation Code and may be changed if needed.
Actual UOM:	The Actual Unit of Measurement by which the Task will be measured. Defaults based on the Operation Code and may be changed if needed.
Notes:	Any notes in the system for the Work Order.
Status:	The status of the Accessorial Task.
Billing Record:	The system-generated ID number for the Billing Record associated with the Work Order Line.
Invoice:	The Invoice number for the task, when invoiced.

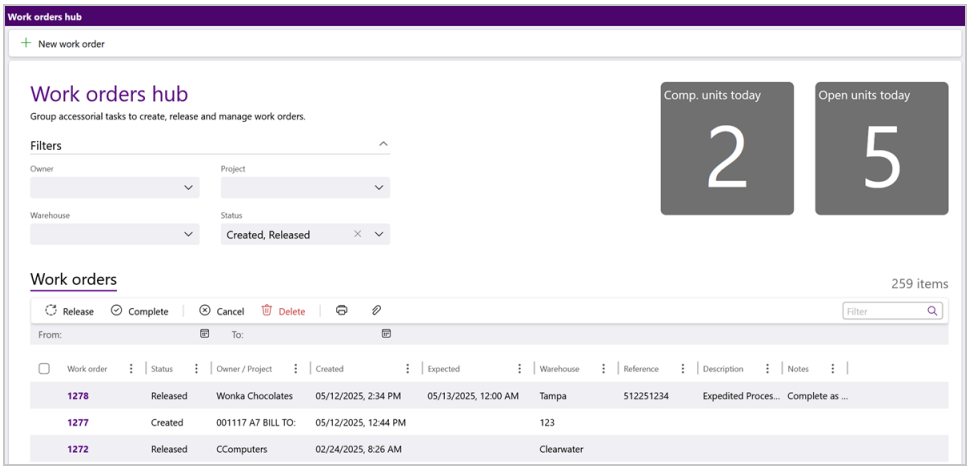
Work Order Billing Records Tab Details

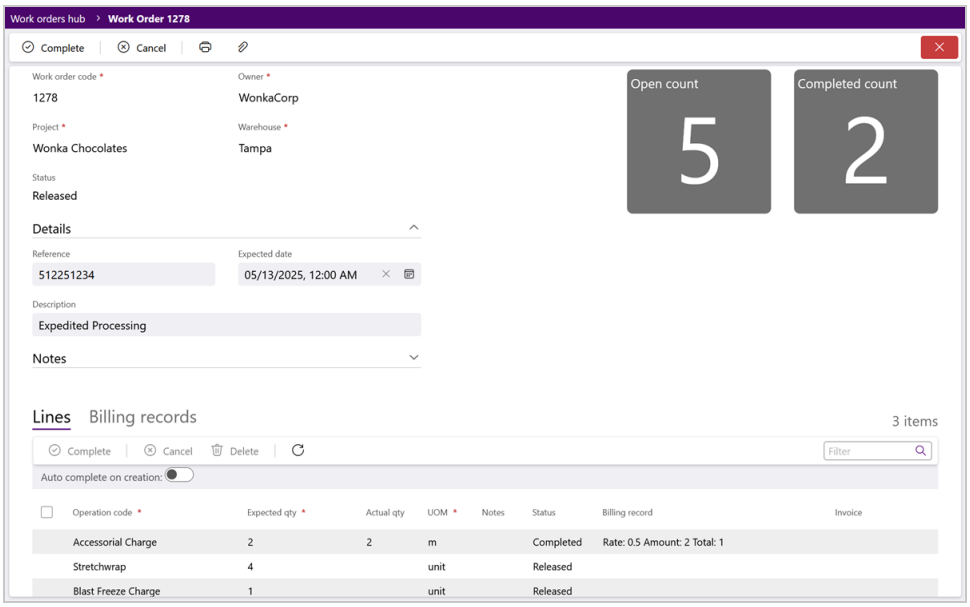
The **Billing Records tab** lists the associated Billing Records. Icons in the tab toolbar allow selected Records to be **Invoiced**, Cancelled, Deleted, or Exported to a CSV. The Billing Records can be filtered by date range and Billing Code.



Billing Record:	The system-generated ID for the Work Order's Billing Record.
Created On:	The date and time when the Billing Record was created.
Billing Code:	The name of the Billing Code the Billing Record is using.
Billing Strategy:	The Contract Line Billing Strategy for the Billing Record.
Operation Code:	The Operation Code associated with the Billing Record, if applicable.

Invoiced:	The system-generated Invoice ID and Line number, if the Billing Record for the Work Order has been invoiced.
Amount:	The number of units of work performed for the Billing Record.
UOM:	The Unit of Measure by which the Billing Record is charging.
Rate:	The rate at which the units of work are being charged for the Work Order's Billing Record.
Minimum Charge:	The minimum charge set in the Contract Line associated with the Billing Record, if applicable.
Total:	The total charge for the Work Order's Billing Record.
Owner / Project:	The Owner and Project associated with the Billing Record.
Order:	The Order associated with the Billing Record, if applicable.
Warehouse:	The warehouse the Billing Record is associated with.
Cancelled:	Indicates whether or not the Billing Record has been cancelled.
Cancelled Reason Code:	The reason the Work Order's Billing Record was cancelled, when applicable.
Notes:	Any notes in the system for the Work Order's Billing Record.





Auto Invoicing Rules Hub

Auto-Invoicing is designed to streamline the invoicing process by automating the generation of invoices based on predefined Invoice Rules. Managing Auto-Invoicing Rules effectively can save time and ensure accuracy in the invoicing process. Templates allow for preserving consistency across all contracts. For Auto-Invoicing to occur for a Project, Auto-Invoicing Rules must be created and enacted.

The **Auto-Invoice Rules Hub** allows users to **Create** and Manage all Auto-Invoice Rules for Project automatic invoicing. An icon in the top toolbar provides options to **Manage** Auto-Invoice Rule Configurations and Debug any issues that may occur.

Auto-Invoice Project Rules Tab Details

The **Project Rules tab** displays all Auto-Invoicing Rules for the selected Owner and Project. Clicking the purple Rule **Name** opens a window to further review and manage the **Auto-Invoicing Rule details**. When Rule Names listed in this tab are not purple links, they can be managed and edited from the **Template Rules** tab.

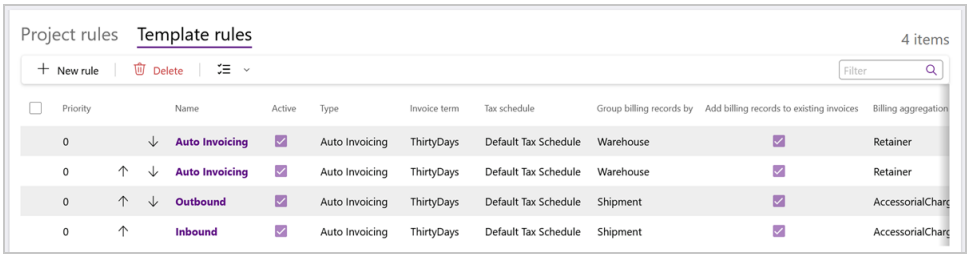
Icons in the tab toolbar provide options to create a + New Rule, Add from Template, Delete a selected Rule, and View More Details for the Project Rules.

Priority:	The priority number of the Project Rule.
Name:	The name of the Project Rule.
Active:	Indicates whether or not the Project Rule status is active.
Type:	The type of Project Rule. Auto-Invoicing is the default.
Invoice Term:	The number of days in the invoice term for the Project Rule.
Tax Schedule:	The tax schedule for the Project Rule.
Group Billing Records By:	Describes how the Billing Records for the Project Rule will be grouped on the invoice.
Add Billing Records to Existing Invoices:	Indicates whether or not Billing Records generated from the Project Rule will be added to existing invoices.
Billing Aggregation Strategies:	The Billing Aggregation Strategies used for the Project Rule.
Billing Codes:	The Billing Codes used for the Project Rule.
Schedule:	The invoice schedule for the Project Rule.
Created On:	The date and time when the Project Rule was created.
Created By:	The user that created the Project Rule.
Modified On:	The date and time when the Project Rule was last modified.
Modified By:	The user that last modified the Project Rule.

Auto-Invoice Template Rules Tab Details

The **Template Rules tab** displays all Auto-Invoicing Rules that have been set up as templates to be applied to any Project. Clicking the purple Rule **Name** opens a window to further review and manage the **Auto-Invoicing Rule details**.

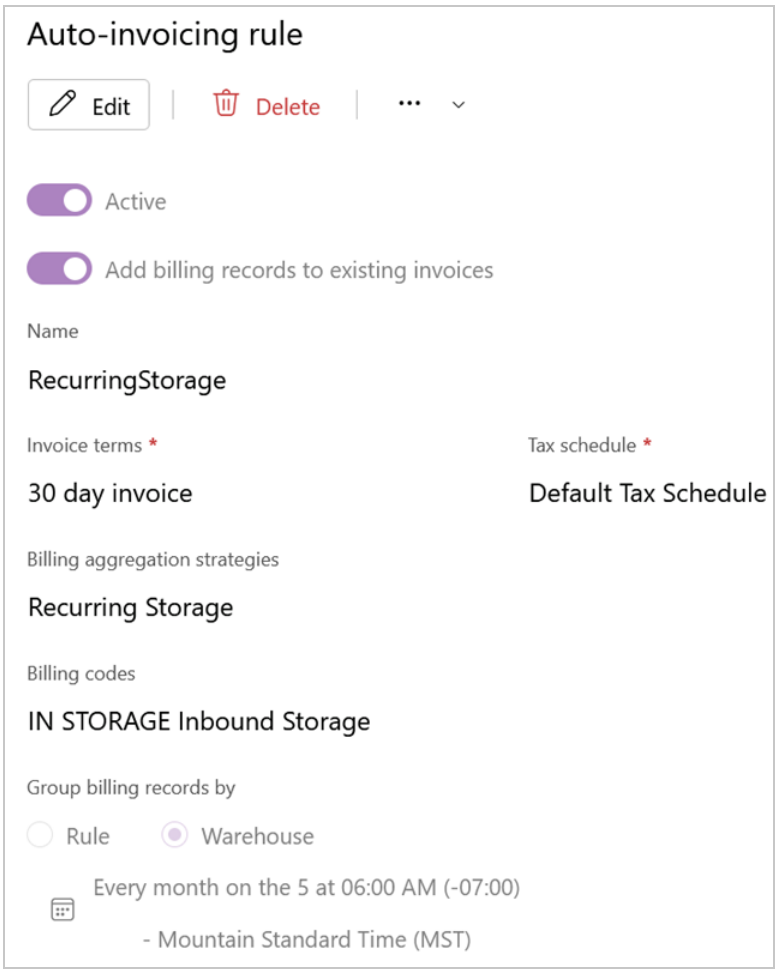
Icons in the tab toolbar provide options to create a + New Rule, Delete a selected Rule, and View More Details for the Template Rules.



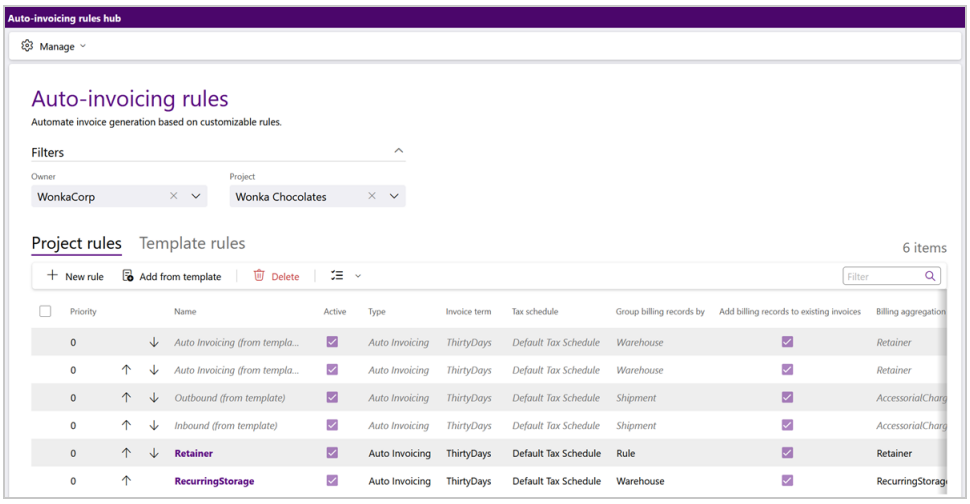
Priority:	The priority number of the Template Rule.
Name:	The name of the Template Rule.
Active:	Indicates whether or not the Template Rule status is active.
Type:	The type of Template Rule. Auto-Invoicing is the default.
Invoice Term:	The number of days in the invoice term for the Template Rule.
Tax Schedule:	The tax schedule for the Template Rule.
Group Billing Records By:	Describes how the Billing Records for the Template Rule will be grouped on the invoice.
Add Billing Records to Existing Invoices:	Indicates whether or not Billing Records generated from the Template Rule will be added to existing invoices.
Billing Aggregation Strategies:	The Billing Aggregation Strategies used for the Template Rule.
Billing Codes:	The Billing Codes used for the Template Rule.
Schedule:	The invoice schedule for the Template Rule.
Created On:	The date and time when the Template Rule was created.
Created By:	The user that created the Template Rule.
Modified On:	The date and time when the Template Rule was last modified.
Modified By:	The user that last modified the Template Rule.

Auto-Invoice Rule Details

The Auto-Invoicing Rule window allows users to Edit or Delete the Rule, as well as review the Rule's Transactions and Logs.



Active:	Indicates whether or not the Auto-Invoicing Rule is active.
Add Billing Records to Existing Invoices:	Indicates whether or not Billing Records generated from the Auto-Invoicing Rule will be added to existing invoices.
Name:	The name of the Auto-Invoicing Rule.
Invoice Terms:	The number of invoice term days for the Auto-Invoicing Rule.
Tax Schedule:	The tax schedule for the Auto-Invoicing Rule.
Billing Aggregation Strategies:	The Billing Aggregation Strategies included in the Auto-Invoicing Rule.
Billing Codes:	The Billing Codes included in the Auto-Invoicing Rule.
Group Billing Records By:	Indicates how the Billing Records for the Auto-Invoicing Rule will be grouped on the invoice.
Schedule:	The invoice schedule for the Auto-Invoicing Rule.


Auto-invoicing rules hub
Manage
Auto-invoicing rules
Automate invoice generation based on customizable rules.
Filters
Owner
WonkaCorp
Project
Wonka Chocolates
Project rules
Template rules
6 items
New rule
Add from template
Delete
Filter
Priority
Name
Active
Type
Invoice term
Tax schedule
Group billing records by
Add billing records to existing invoices
Billing aggregation
0 Auto Invoicing (from templa... Auto Invoicing ThirtyDays Default Tax Schedule Warehouse Retainer
0 Auto Invoicing (from templa... Auto Invoicing ThirtyDays Default Tax Schedule Warehouse Retainer
0 Outbound (from template) Auto Invoicing ThirtyDays Default Tax Schedule Shipment AccessorialCharg
0 Inbound (from template) Auto Invoicing ThirtyDays Default Tax Schedule Shipment AccessorialCharg
0 Retainer Auto Invoicing ThirtyDays Default Tax Schedule Rule Retainer
0 RecurringStorage Auto Invoicing ThirtyDays Default Tax Schedule Warehouse RecurringStorag

Manage Billing Codes

Billing Codes are used in conjunction with Operation Codes and Contracts to generate **Billing Records**. Each Line in a Contract is assigned a Billing Code, which determines how its revenue will be distributed.

✠ Prerequisites

- **Owner**
- **Project**
- **Billing Contract**

☪ Please Note

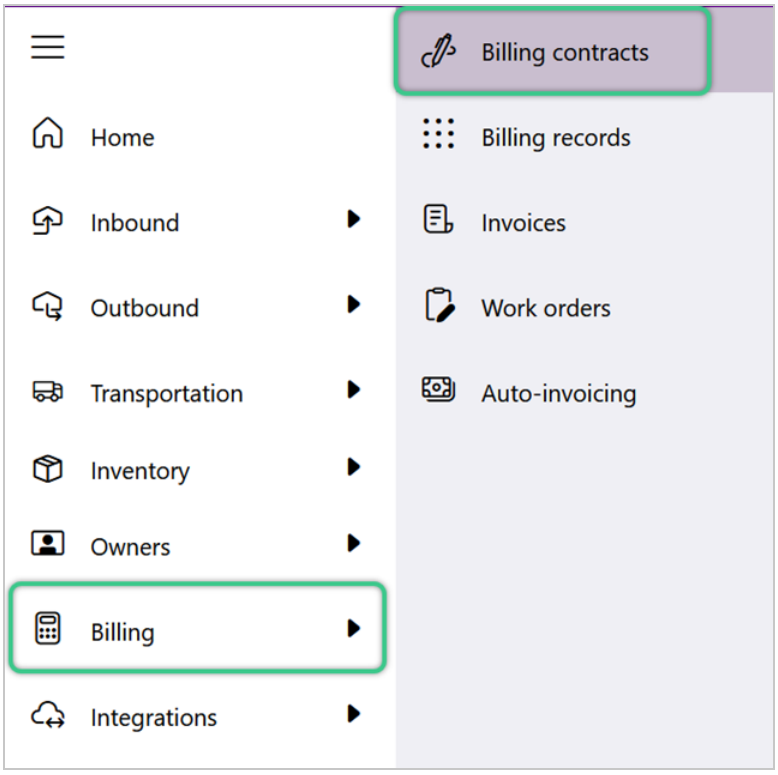
- **Operation Codes**, **Billing Strategies**, **Terms**, **Currencies**, and **Tax Schedules** must already be configured.
- Billing Contracts can be used along with external accounting software.

For assistance managing these billing presets or setting up external Billing, please contact Datex.

Step 1. Open the Billing Contracts Hub

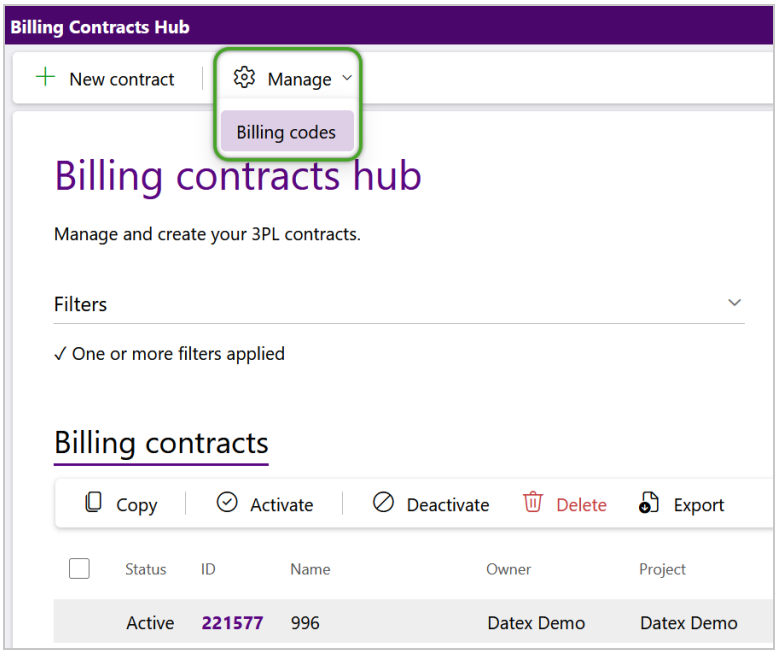
1. Click **Billing** in the left navigation menu, then select **Billing Contracts** in the submenu.

The **Billing Contracts Hub** will display.

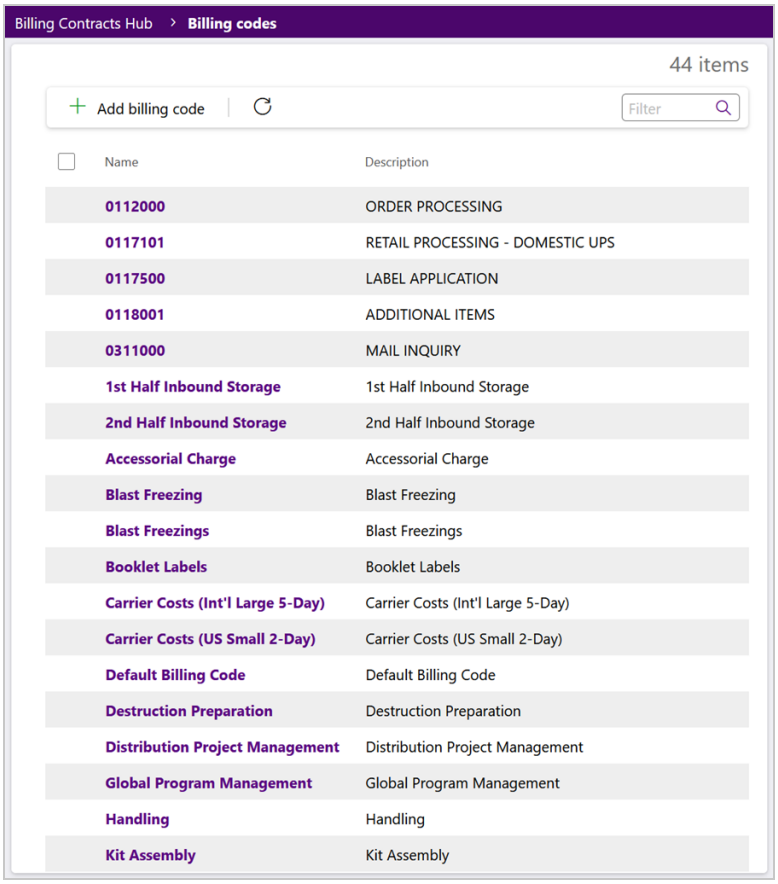


Step 2. Create a New Billing Code

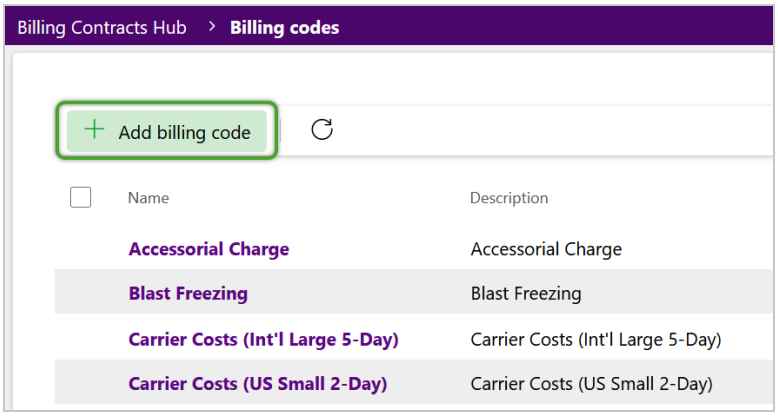
1. Click **Manage** in the top toolbar and select **Billing Codes**.



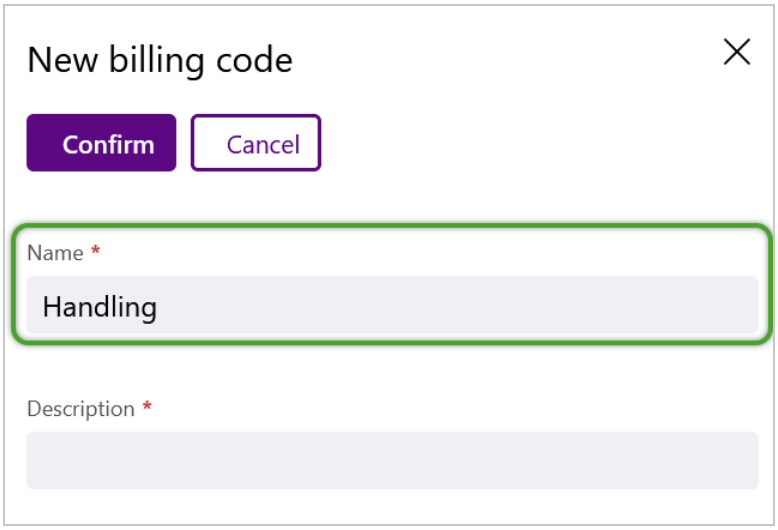
The **Billing Codes** list will appear.



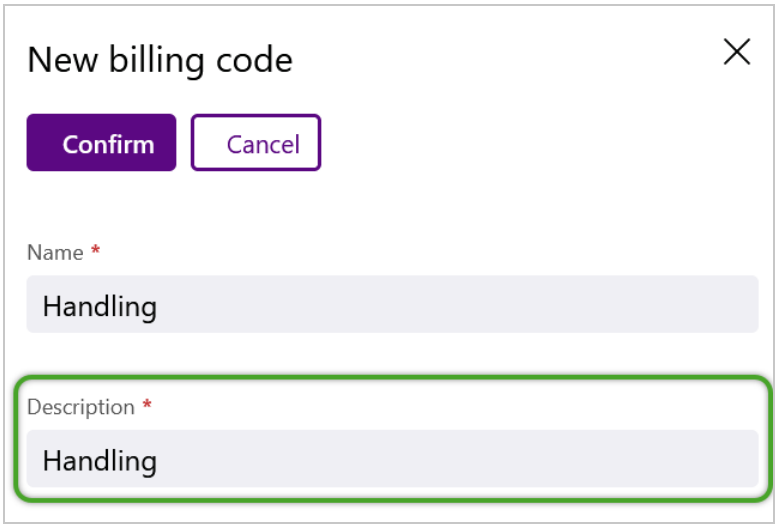
2. Click the **+ Add Billing Code** option in the top toolbar.



3. In the **New Billing Code** window, enter the **Name** of the new code.

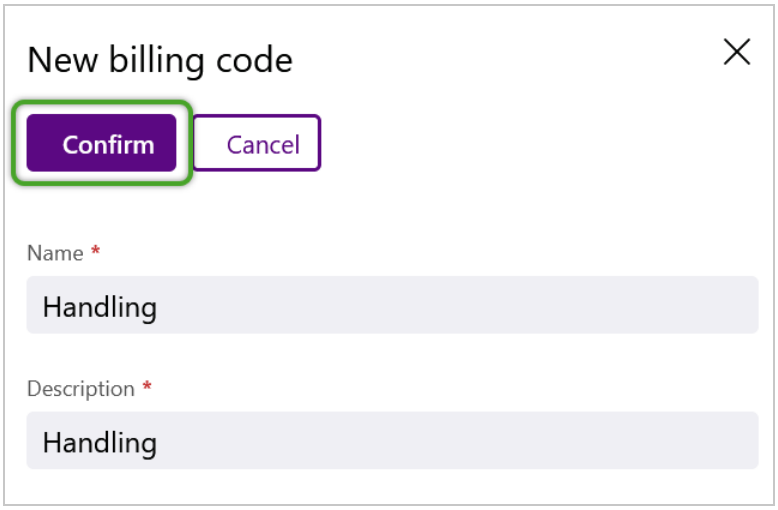


4. Enter the **Description** for the new code.



Step 3. Save the New Billing Code

1. Once all the new code details have been entered, click the purple **Confirm** button in the top left corner of the window.



Create a Contract

Contracts determine how much Owners are charged for your services. Each Project requires it's own Contract, and can only have one Active Contract at a time. Creating a Billing Contract involves adding Contract Lines. Every billable Activity or Task will have a Contract Line set up for it. To save time, Billing Contracts can be Copied and edited before activation.

Tip

It may be helpful to create a single Contract as a Template, leave it Inactive, and then **Copy that Contract** when you need to make new Contracts for customers.

Prerequisites

- **Owner**
- **Project**
- **Billing Contract**

Please Note

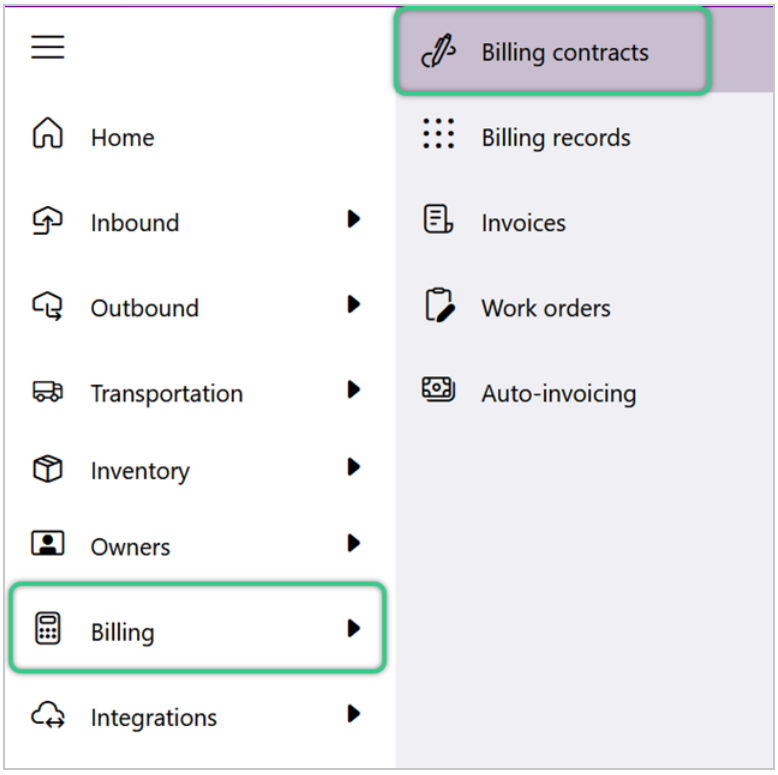
- **Operation Codes**, **Billing Strategies**, **Terms**, **Currencies**, and **Tax Schedules** must already be configured.
- Billing Contracts can be used along with external accounting software.

For assistance managing these billing presets or setting up external Billing, please contact Datex.

Step 1. Open the Billing Contracts Hub

1. Click **Billing** in the left navigation menu, then select **Billing Contracts** in the submenu.

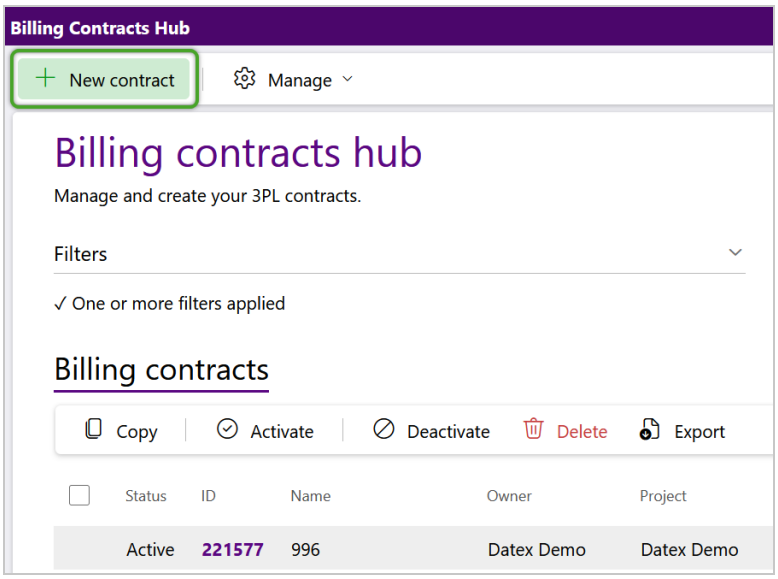
The **Billing Contracts Hub** will display.



Step 2. Create a New Billing Contract

1. Click **+ New Contract** in the top toolbar.

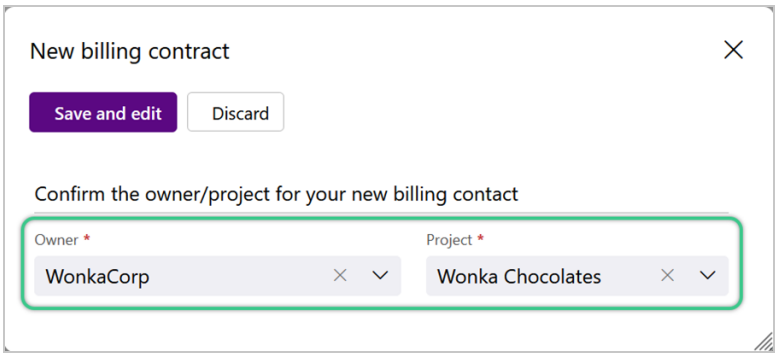
The **New Billing Contract** window will appear.



Step 3. Enter Basic Contract Details

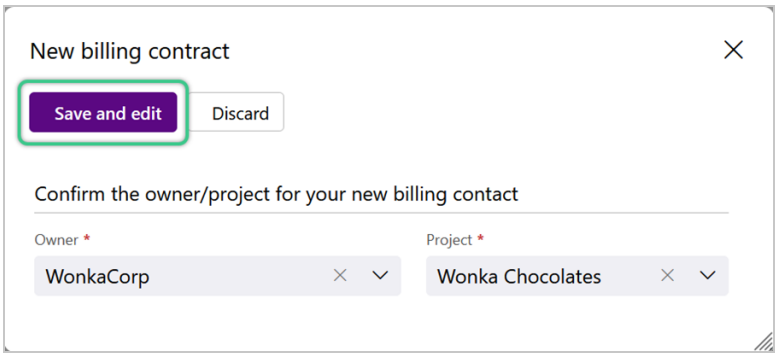
1. Select the required **Owner** and **Project** for the new Contract.

Each individual Project will require its own Contract.



2. Click the purple **Save & Edit** button to begin setting up the Contract.

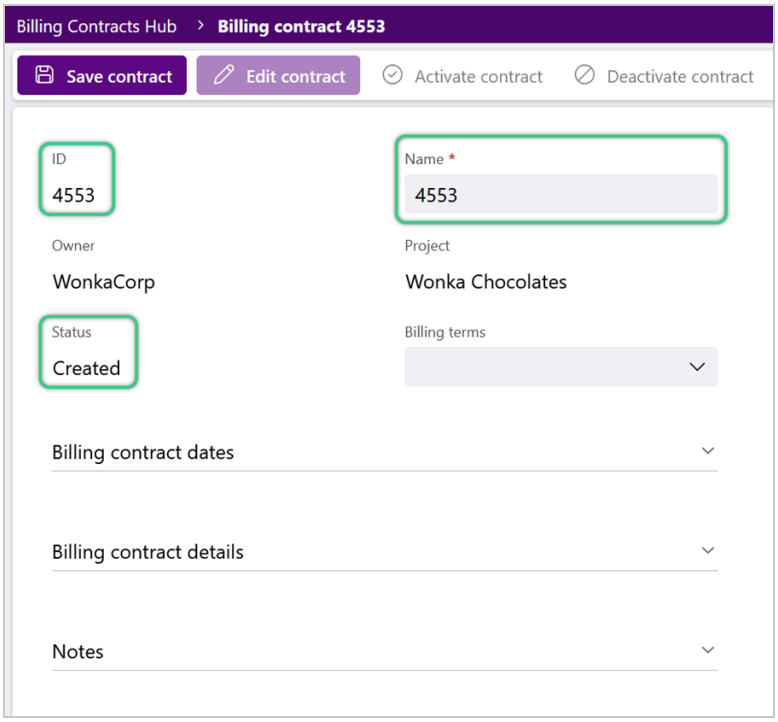
The **Billing Contract** record will display.



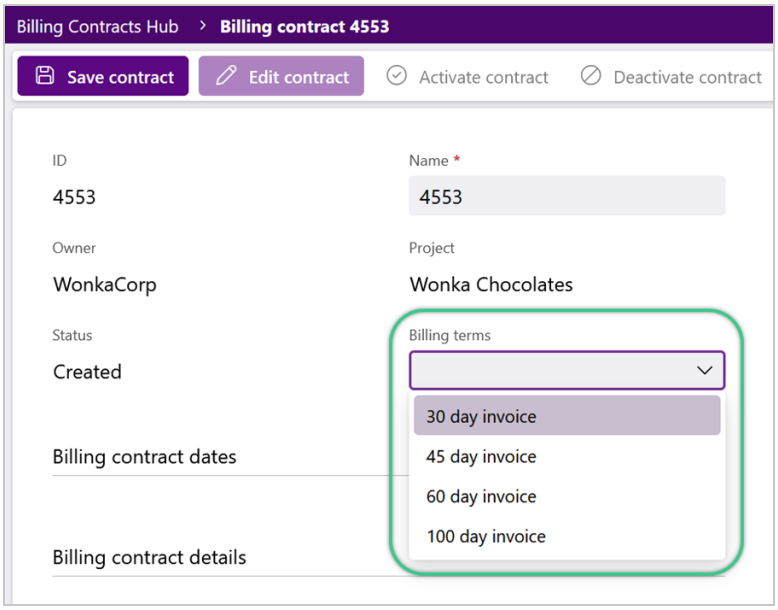
3. At the top of the **Billing Contract** the contract **ID** and **Name** will auto-populate.

The contract **Name** can be updated.

The Status is set to '**Created**' by default and will not update to '**Active**' until the contract has been both saved and activated.



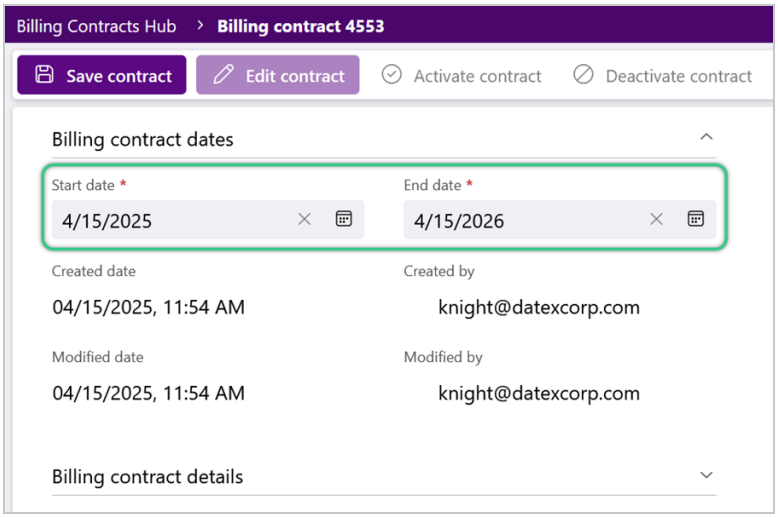
4. Select the **Billing Terms** for the new Contract.



Step 4. Set Contract Dates

1. In the **Billing Contract Dates** section, set the contract **Start Date** and **End Date**.

The dates default from the current day for one year and can be updated. The **Start Date** cannot be a date in the past.



Note

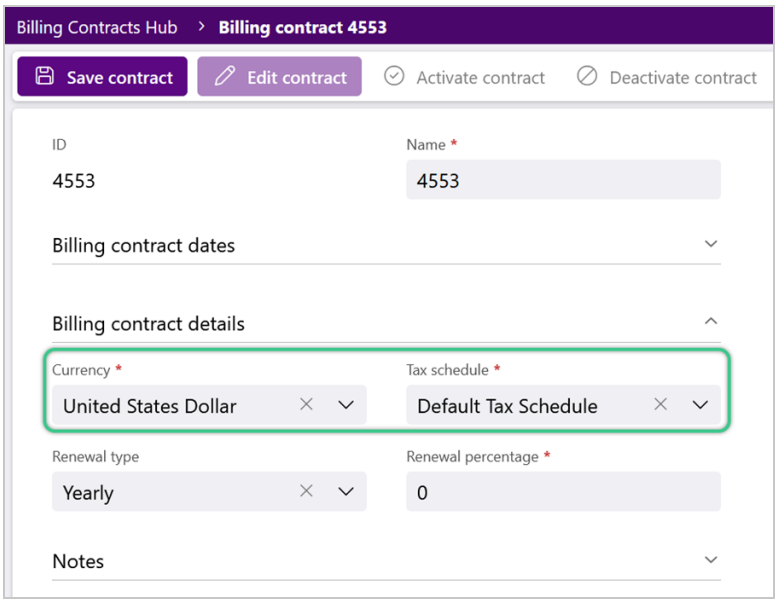
For the Contract to work properly, the **Start Date** must be the date the Contract is Activated.

Tip

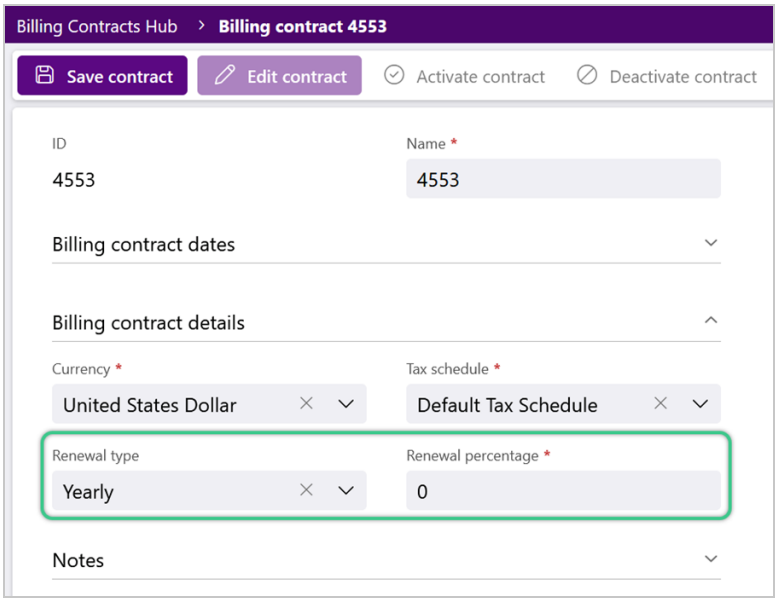
You can create a second contract for this Project, set its **Effective Start Date** to the day after the **End Date** of the first contract, and leave it Unactivated so the system will automatically switch over to the new Contract on its **Start Date**.

Step 5. Specify Contract Details

1. In the **Billing Contract Details** section, select the required contract **Currency** and **Tax Schedule**.



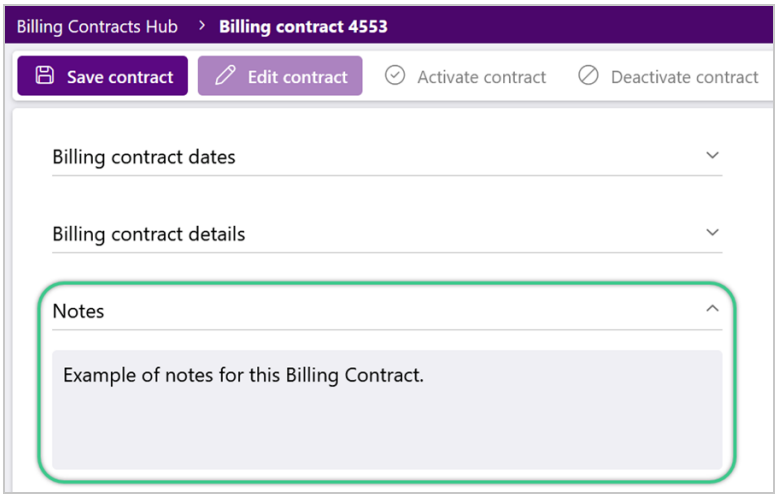
2. (Optional) If applicable, select a **Renewal Type** and set a **Renewal Percentage**.



Step 6. (Optional) Add Contract Notes

1. Enter any optional **Notes**.

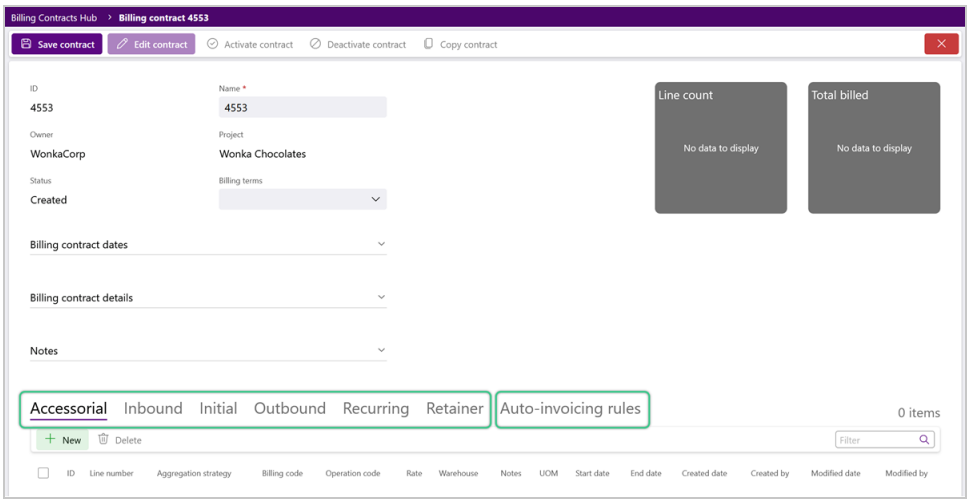
These Notes are saved for review and reporting, but otherwise have no effect on anything in Footprint.



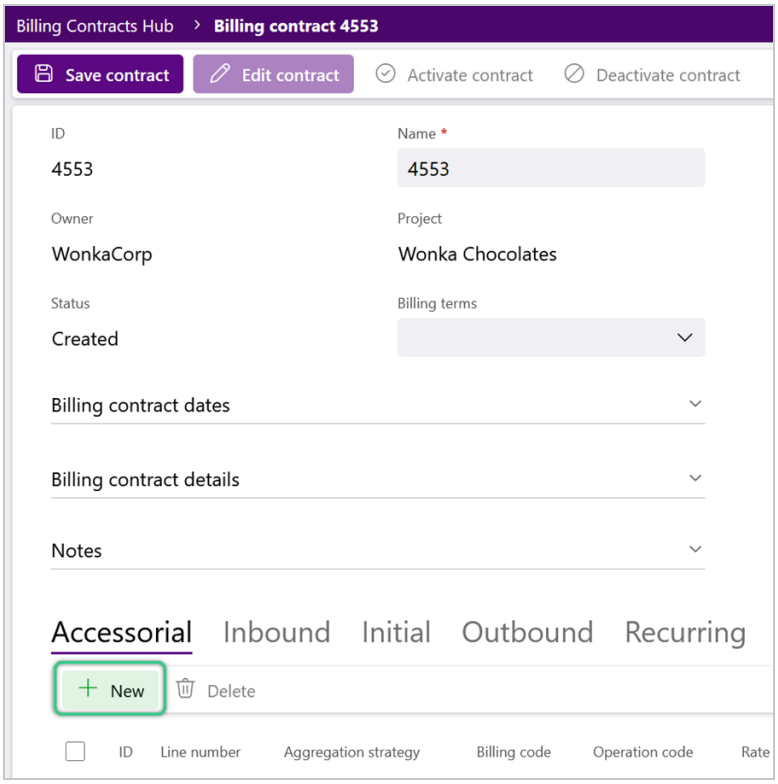
Step 7. Add Contract Lines

At the bottom of the **Billing Contract** record, use the tabs to add **Contract Lines** for each specific charge in the contract, as well as any **Auto-Invoicing Rules**.

Each Contract Line must use a **Billing Aggregation Strategy**. For more details about each of these Billing Strategies, please visit our **Billing Guide**.

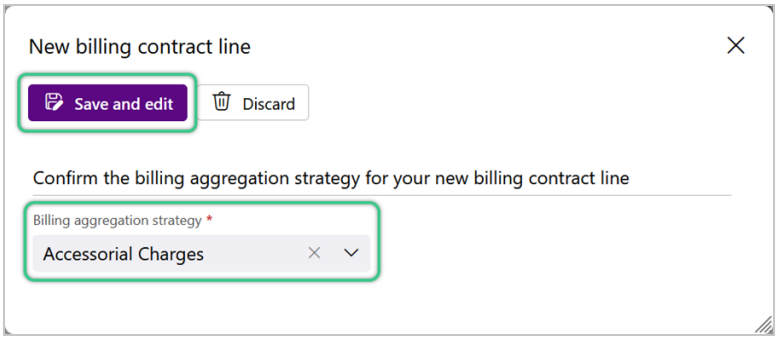


1. To add Contract Lines, first click the desired tab, then click the **+ New** option in the tab toolbar.



The **Billing Contract Line** wizard will display.

2. Select a **Billing Aggregation Strategy** from the list, then click the purple **Save & Edit** button.

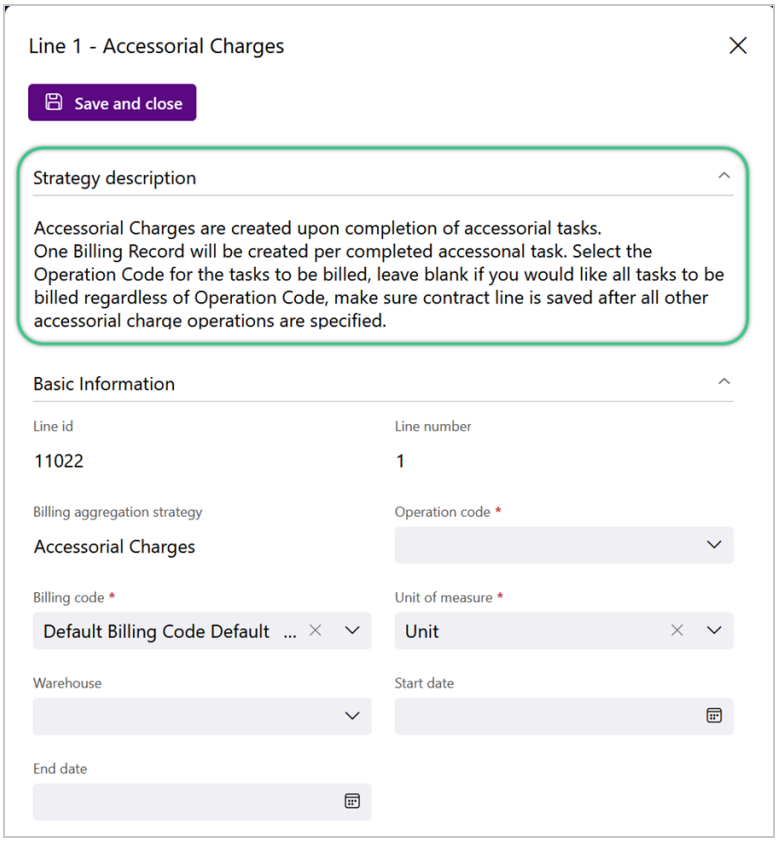


Depending upon the **Billing Aggregation Strategy** selected, the wizard will prompt the user to enter all required and any desired optional details for the new Contract Line.

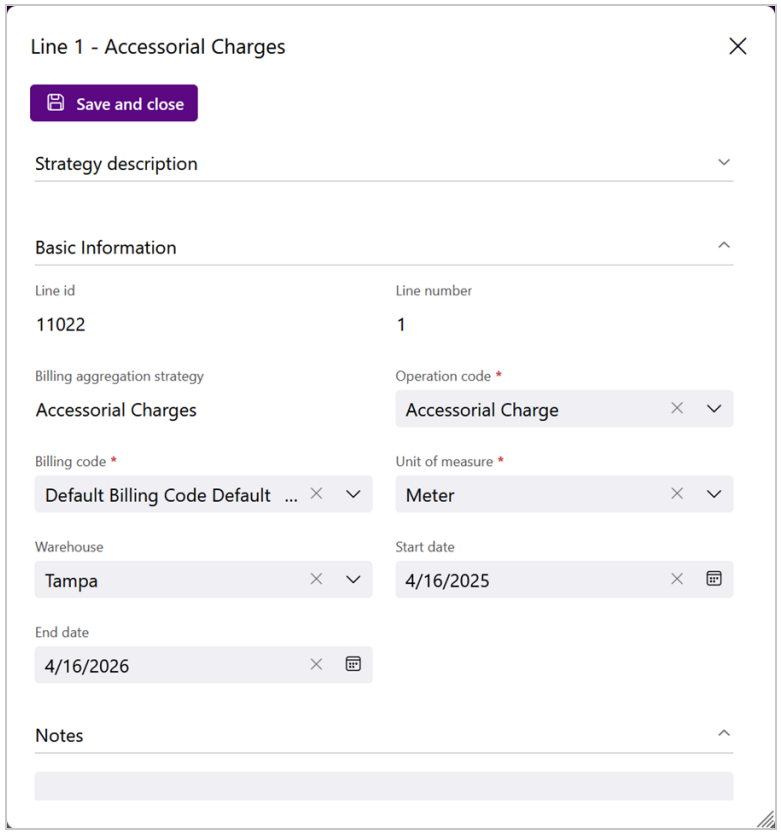
This image shows an example of the requested **Accessorial Charges** details to be completed.

For a detailed walk-through of the Wizard? and each available Billing Strategy, see the Billing Strategies in the Billing Guide (link to dropdowns in Guide from top of this step).

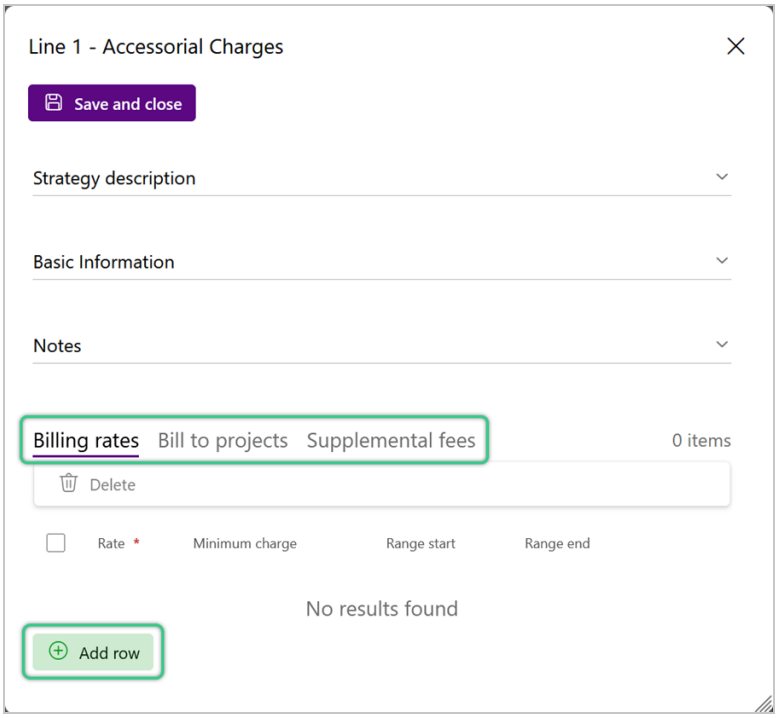
The **Strategy Description** will populate for reference.



3. Enter the requested **Basic Information** for the new Contract Line, and any optional **Notes**.

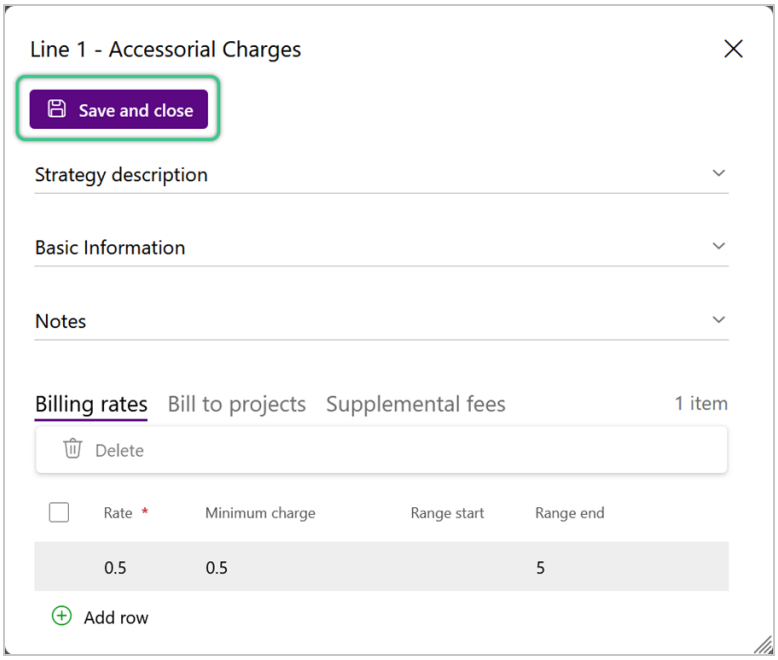


4. Scroll to the bottom of the wizard, and in the relevant tab(s), click the green **+ Add Row** option to add **Billing Rates**, **Bill to Project**, and **Supplemental Fees** for this Contract Line.



5. Once details for the new Contract Line have been specified, click the purple **Save & Close** button at the top of the wizard to add it to the new Billing Contract.

6. Repeat steps 1 - 5 to add as many different Contract Lines as needed.



❑Important

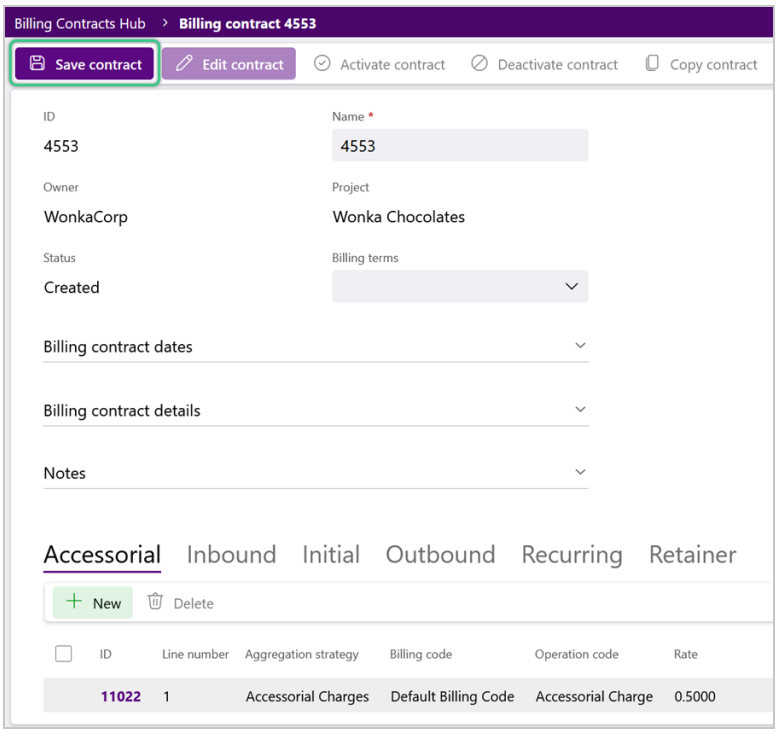
To avoid duplicate billing, confirm there are not multiple Contract Lines set up to bill for the same thing before activating the Billing Contract.

Step 8. Save the New Contract

1. Once all the new contract details have been entered, click the purple **Save Contract** button in the top left corner of the Billing Contract.

The status will remain '**Created**' and the contract cannot yet be used.

The status will only update to '**Active**' and allow the contract to be used after activation (see Step 9 below).



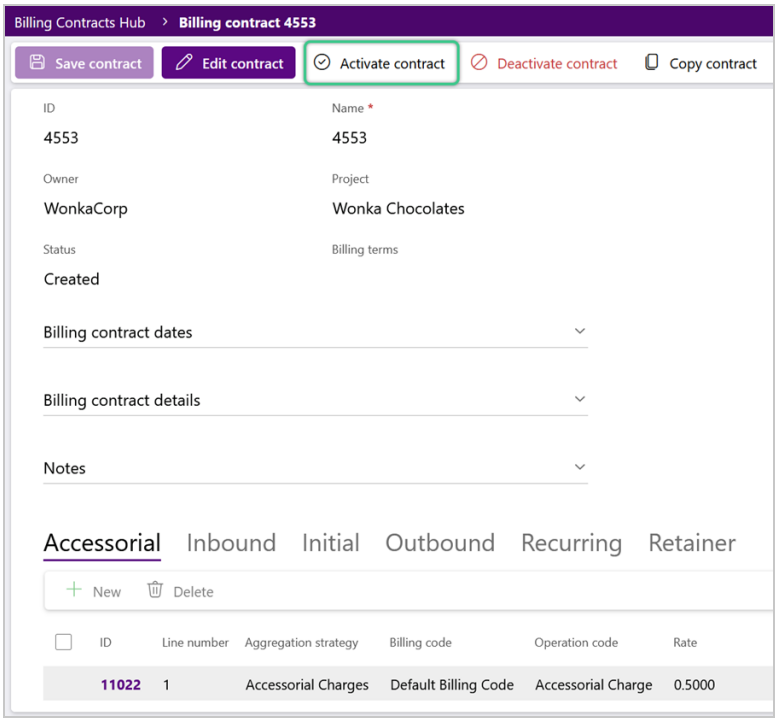
Step 9. Activate the New Contract

Tip

If the Billing Records should not be created yet, you can wait and Activate the Billing Contract when ready. Once a Contract is Active, it cannot be edited in any way. Each Project can only have one 'Active' Contract for a

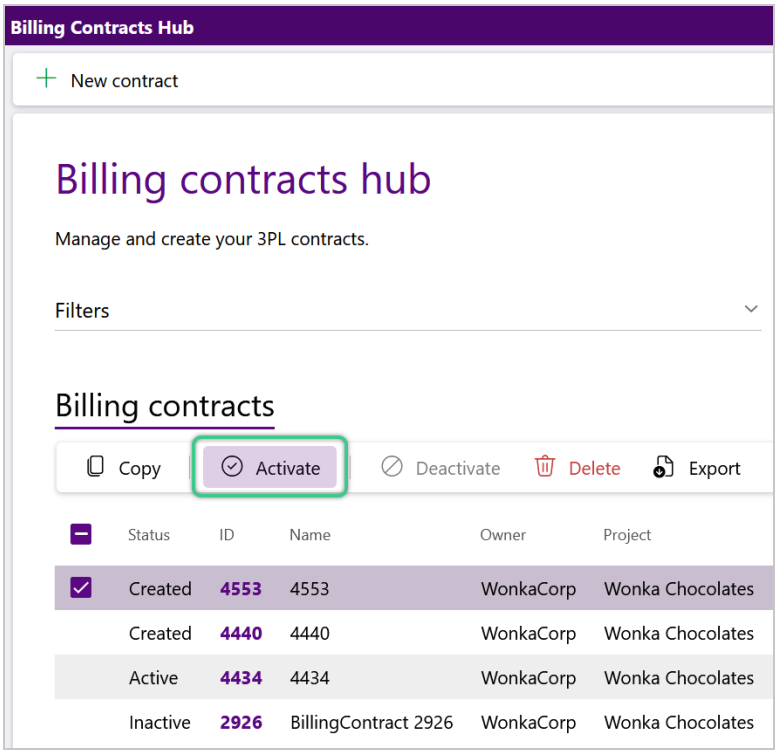
given date range. This means the Start and End Dates of a Project's active Contracts cannot overlap.

1. If you are ready to Activate the new Billing Contract, creating Billing Records now, click **Activate Contract** in the top toolbar.



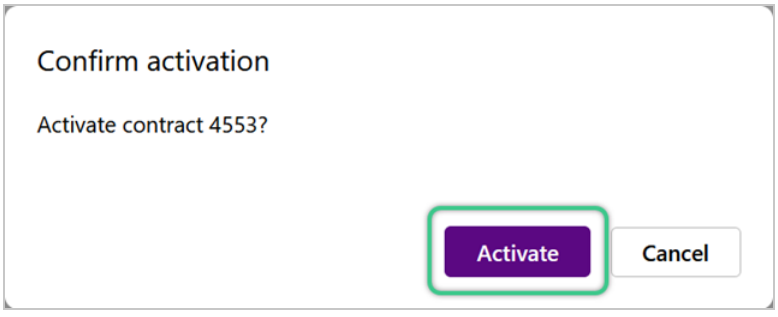
If you are not ready to Activate the new Billing Contract and create the Billing Records at this time, you can close the Contract and return to the **Billing Contracts Hub**.

In the future, when the Contract and it's Records are needed, filter the **Billing Contracts Hub** for '**Created**' Contracts, select the Contract, then click **Activate** in the tab toolbar.



2. Click the purple **Activate** button in the confirmation window.

The new Billing Contract will appear with the '**Active**' status in the **Billing Contracts Hub**, making it available for use and allowing Billing Records to be created.



Copy a Contract

To save time, existing Billing Contracts can be copied and edited. After modifications are made, the copied Contract can be activated for use.

Tip

It may be helpful to create a single Contract as a Template, leave it Inactive, and then **Copy that Contract** when you need to make new Contracts for customers.

Prerequisites

- **Owner**
- **Project**
- **Billing Contract**

Please Note

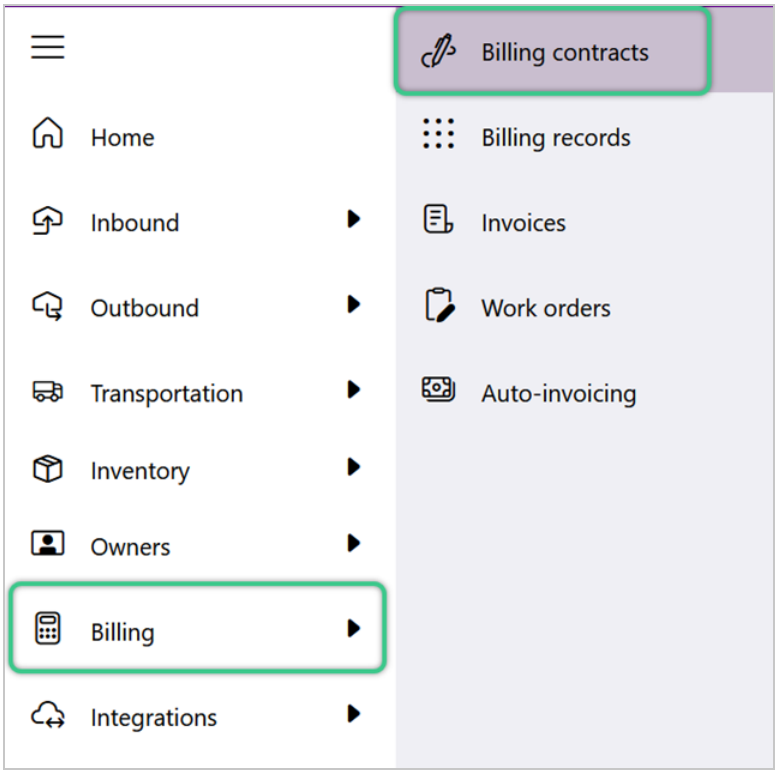
- **Operation Codes**, **Billing Strategies**, **Terms**, **Currencies**, and **Tax Schedules** must already be configured.
- Billing Contracts can be used along with external accounting software.

For assistance managing these billing presets or setting up external Billing, please contact Datex.

Step 1. Open the Billing Contracts Hub

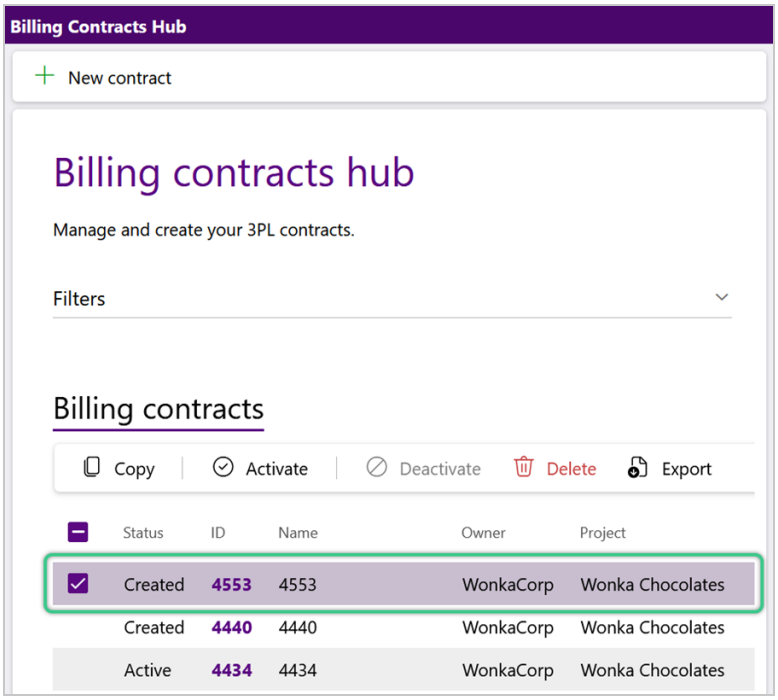
1. Click **Billing** in the left navigation menu, then select **Billing Contracts** in the submenu.

The **Billing Contracts Hub** will display.

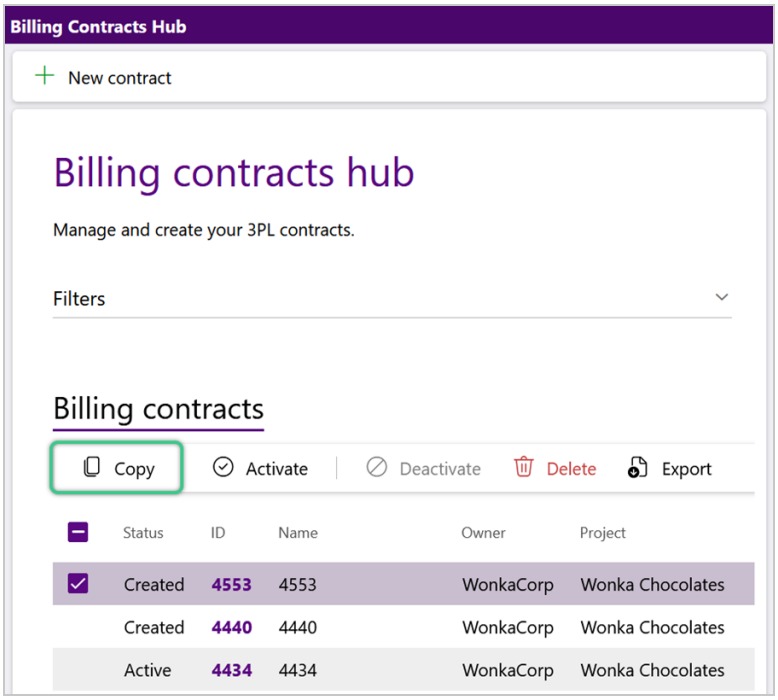


Step 2. Copy the Contract

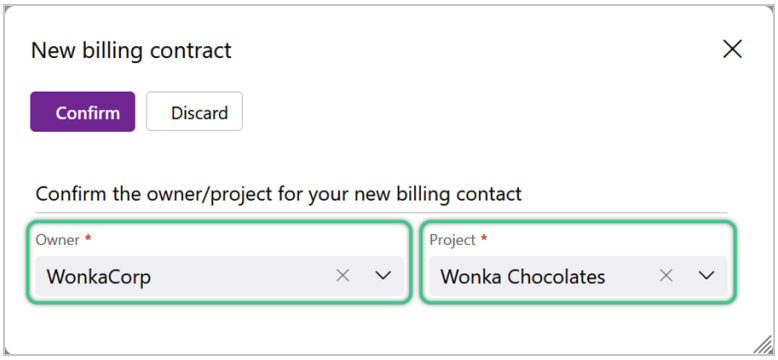
1. Locate the **Billing Contract** to be copied and click the check box to select it.



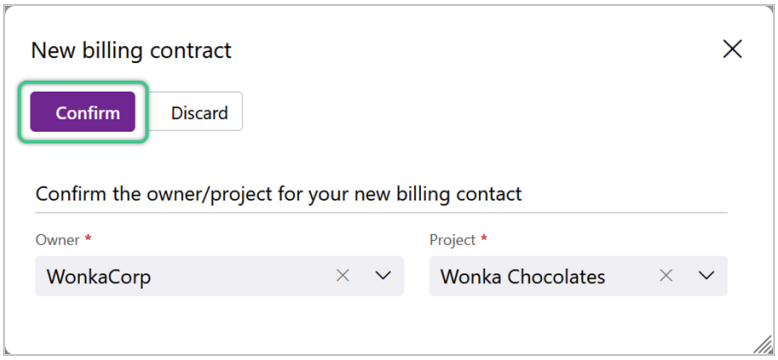
2. Click the **Copy** option in the Billing Contracts tab toolbar.



3. In the **Billing Contract Creation Form**, select the **Owner** and **Project** for the new Contract.

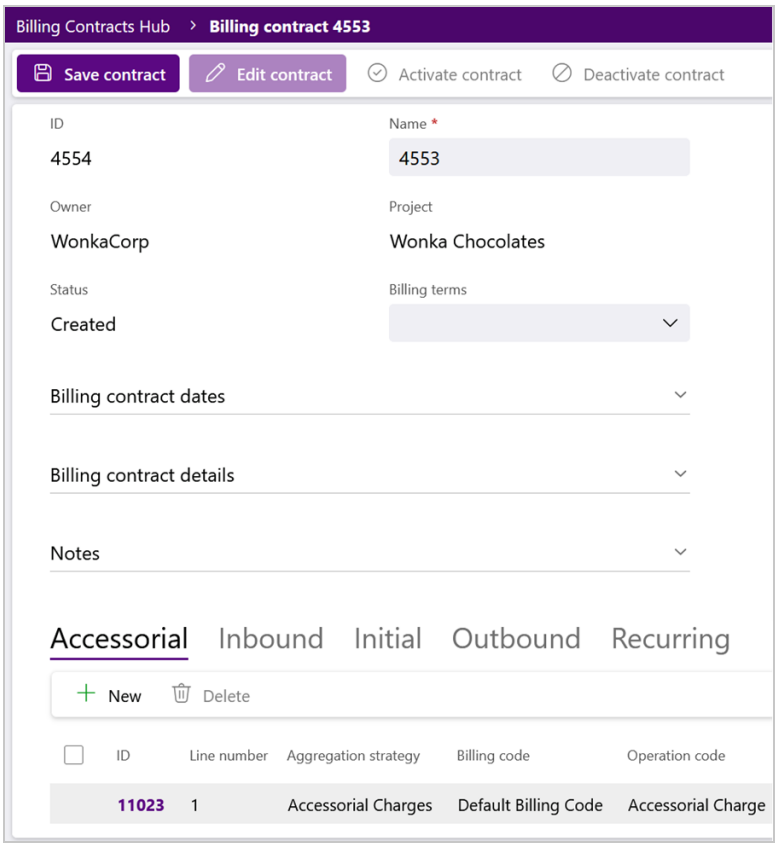


4. Click the purple **Confirm** button in the top left corner.



The new Billing Contract will be created, containing all the same information from the original.

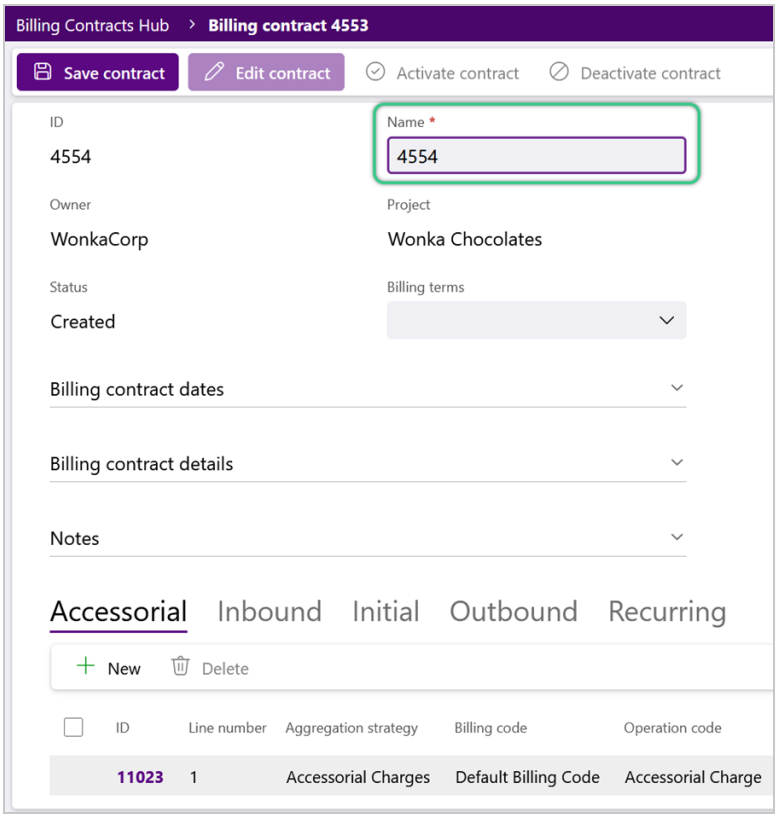
The status is set to '**Created**' by default and will not update to '**Active**' until the contract has been both saved and activated (see **Step 4** below).



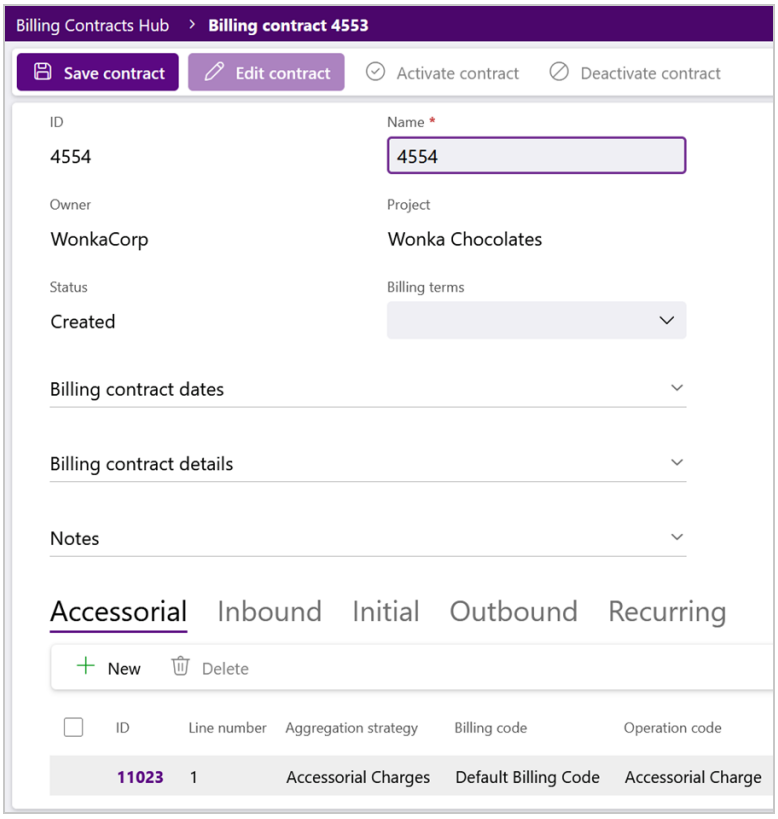
Step 3. Update the Copied Contract

The Contract can now be edited, creating new Contract Lines or deleting old ones.

1. Give the Billing Contract a new **Name**.



2. Review and edit each section of the contract as needed, adding new Contract Lines and/or deleting old ones before activation.

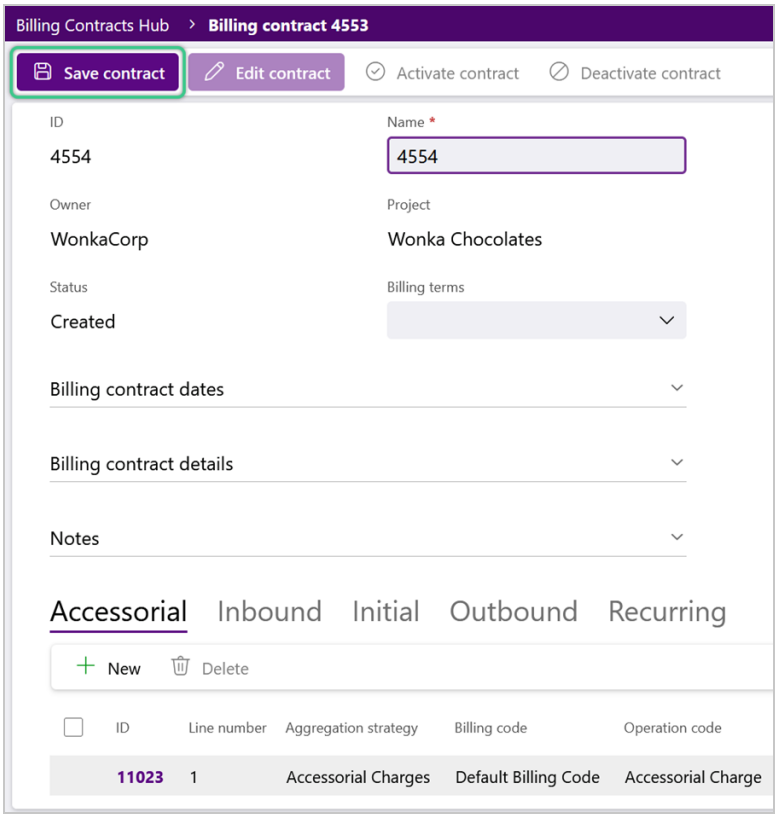


❑Important

To avoid duplicate billing, confirm there are not multiple Contract Lines set up to bill for the same thing before activating the Billing Contract.

3. Once all the necessary contract details have been updated, click the purple **Save Contract** button in the top left corner.

The status will remain '**Created**' and the contract cannot yet be used. The status will only update to '**Active**' after activation.



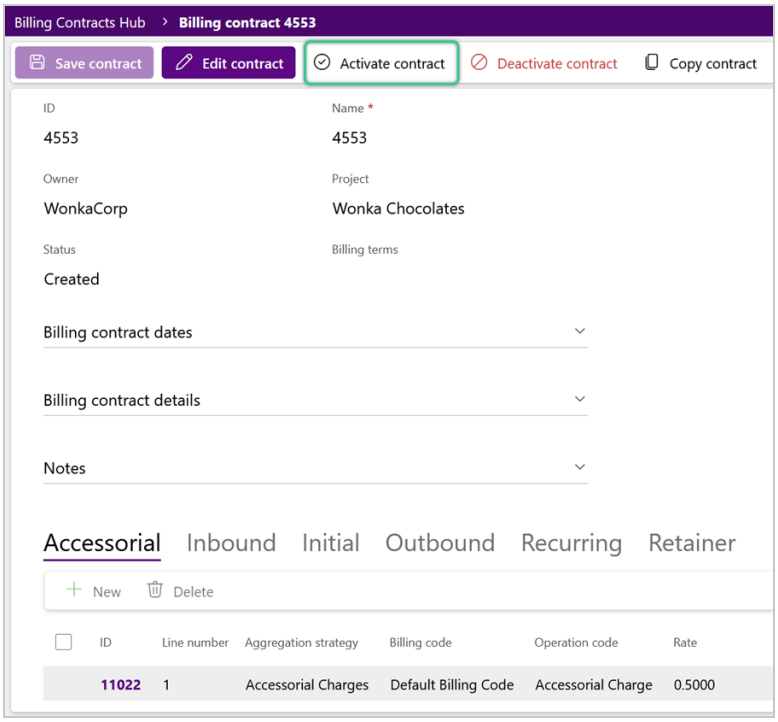
Step 4. Activate the Contract

A Contract must be Activated before it is able to begin creating Billing Records.

Tip

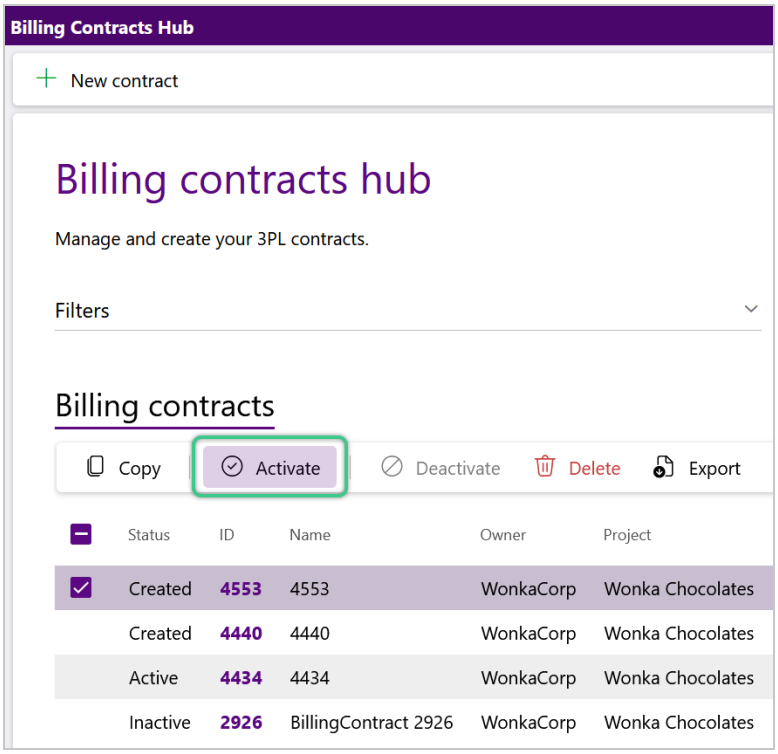
If the Billing Records should not be created yet, you can wait and Activate the Billing Contract when ready. Once a Contract is Active, it cannot be edited in any way. Each Project can only have one Active Contract at any time.

1. If you are ready to Activate the new Billing Contract, creating Billing Records now, click **Activate Contract** in the top toolbar.



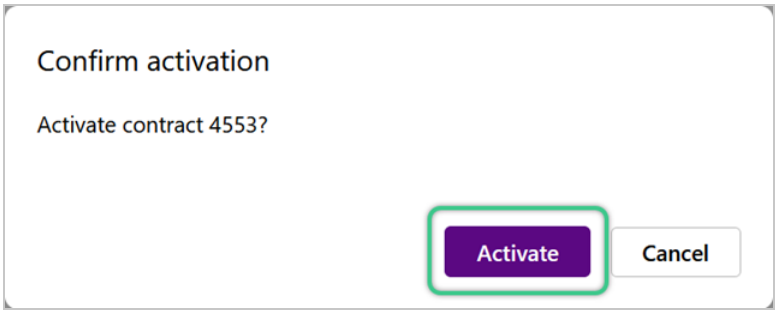
If you are not ready to Activate the new Billing Contract and create the Billing Records at this time, you can close the Contract and return to the **Billing Contracts Hub**.

In the future, when the Contract and it's Records are needed, filter the **Billing Contracts Hub** for '**Created**' Contracts, select the Contract, then click **Activate** in the tab toolbar.



2. Click the purple **Activate** button in the confirmation window.

The new Billing Contract will appear with the '**Active**' status in the **Billing Contracts Hub**, making it available for use and allowing Billing Records to be created.



Deactivate a Contract

When the time comes to end a Billing Contract, it can be Deactivated.

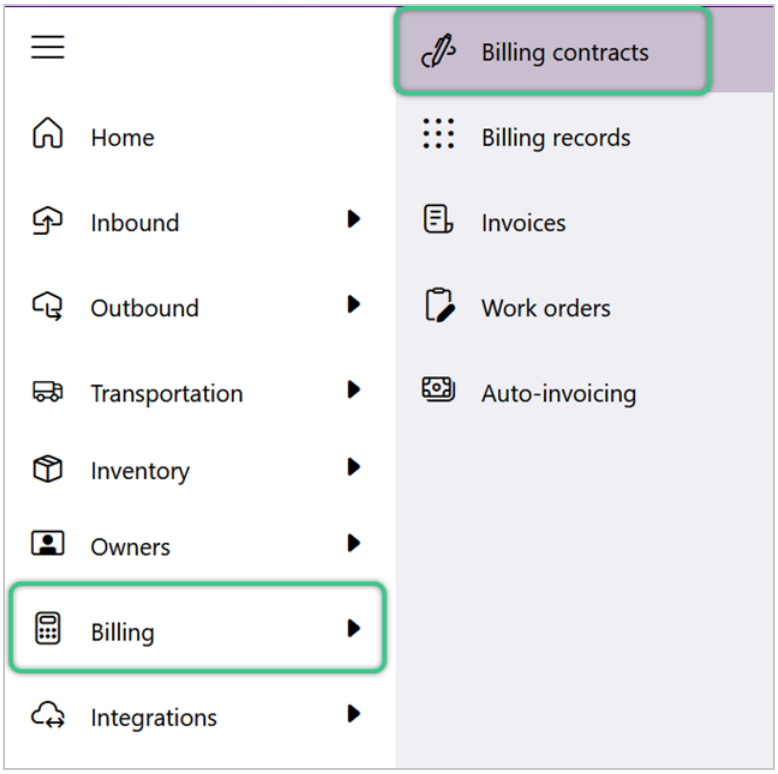
✠ Prerequisites

- Owner
- Project
- Billing Contract

Step 1. Open the Billing Contracts Hub

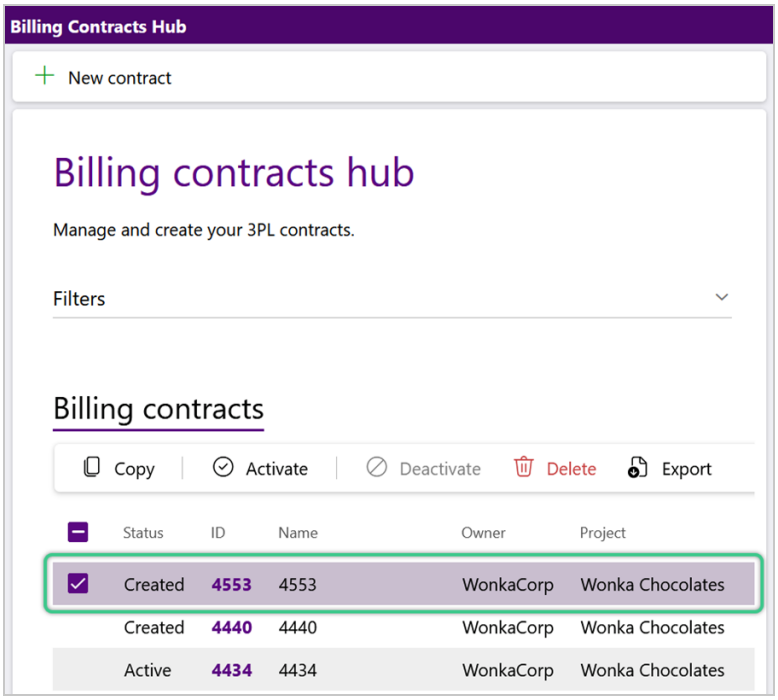
1. Click **Billing** in the left navigation menu, then select **Billing Contracts** in the submenu.

The **Billing Contracts Hub** will display.



Step 2. Locate the Billing Contract

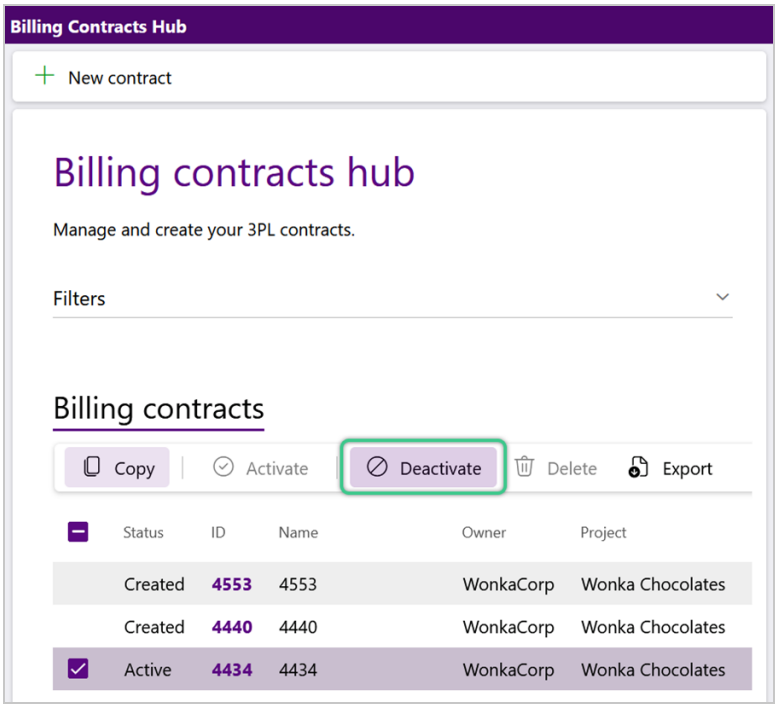
1. Locate the **Billing Contract** to be deactivated and click the check box to select it.



Step 3. Deactivate the Billing Contract

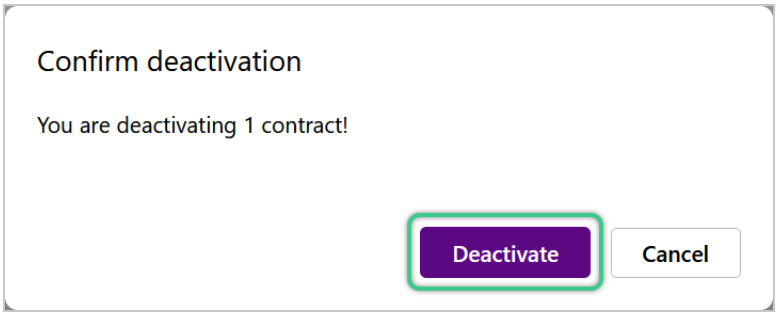
The Contract can now be deactivated.

1. Click the **Deactivate** option in the Billing Contracts tab toolbar.



2. Click the purple **Deactivate** button in the confirmation window.

A deactivated Billing Contract will no longer create Billing Records and will only appear in the **Billing Contracts Hub** when filtering for **Deactivated** Billing Contracts.



Create an Invoice from a Billing Record

Billing Records are created once a Contract has been Activated, and Activity related to that Contract's Lines have taken place. Invoices are created from Billing Records after activating a Billing Contract. Invoices can be created from one or more Billing Records in the Billing Records Hub, or directly from the Invoices Hub.

This tutorial explains how to create an Invoice from the Billing Records Hub by assigning the Record(s) to a new or existing Invoice. When more than one Record is selected, they can be added as one Invoice Line or as an Invoice Line for each selected Record.

Note

Billing Records can only be assigned to one Invoice. Once assigned, a Billing Record will no longer be available for invoicing and can only be found when filtering for Invoiced Billing Records.

Prerequisites

- Owner
- Project
- Billing Contract
- Available Billing Records

Please Note

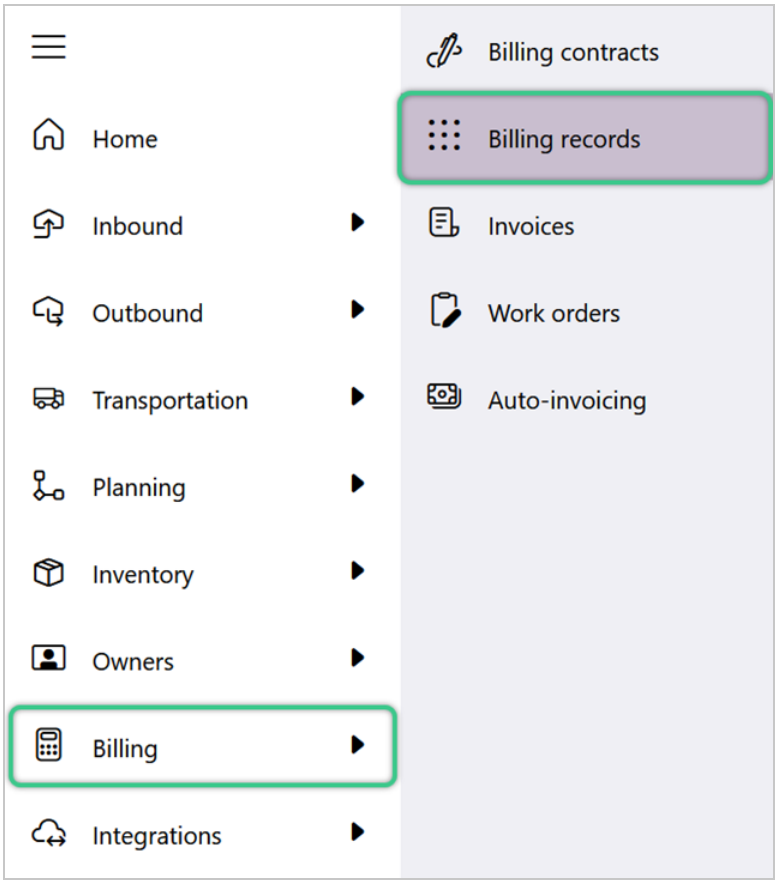
- **Operation Codes**, **Billing Strategies**, **Terms**, **Currencies**, and **Tax Schedules** must already be configured.
- Billing Contracts can be used along with external accounting software.

For assistance managing these billing presets or setting up external Billing, please contact Datex.

Step 1. Open the Billing Records Hub

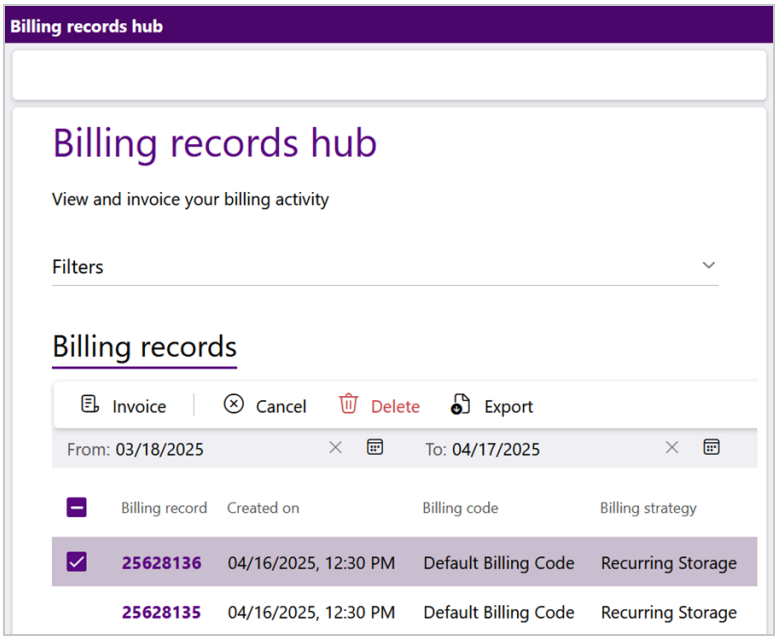
1. Click the **Billing** int the left navigation menu, then select **Billing Records**.

The **Billing Records Hub** will display.



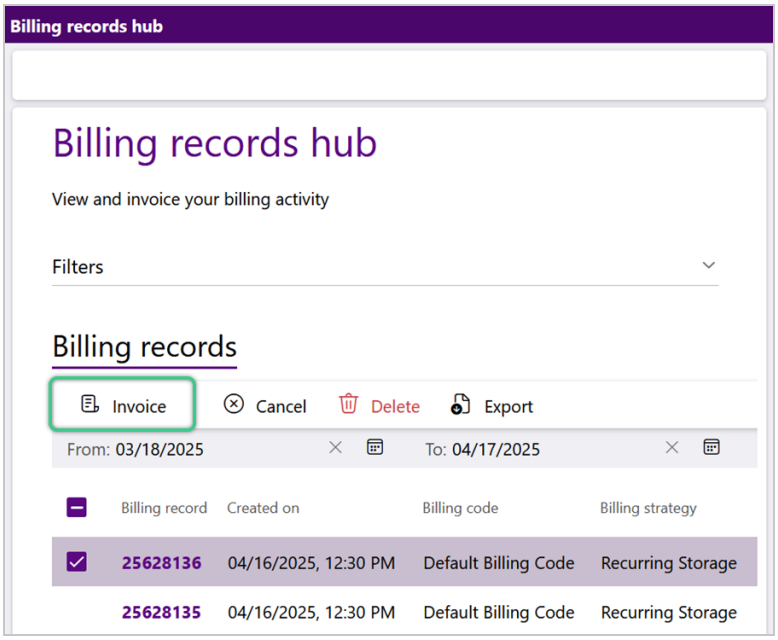
Step 2. Locate the Billing Record(s)

1. Locate the **Billing Record(s)** to be assigned to an Invoice and click the check box (es) to select it/them.

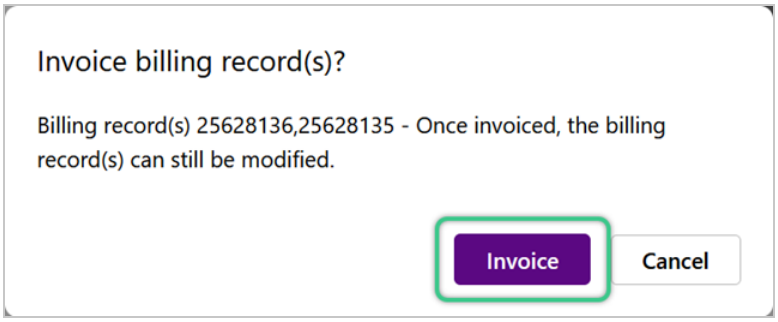


Step 3. Create the Invoice

1. Click the **Invoice** option in the Billing Records tab toolbar.

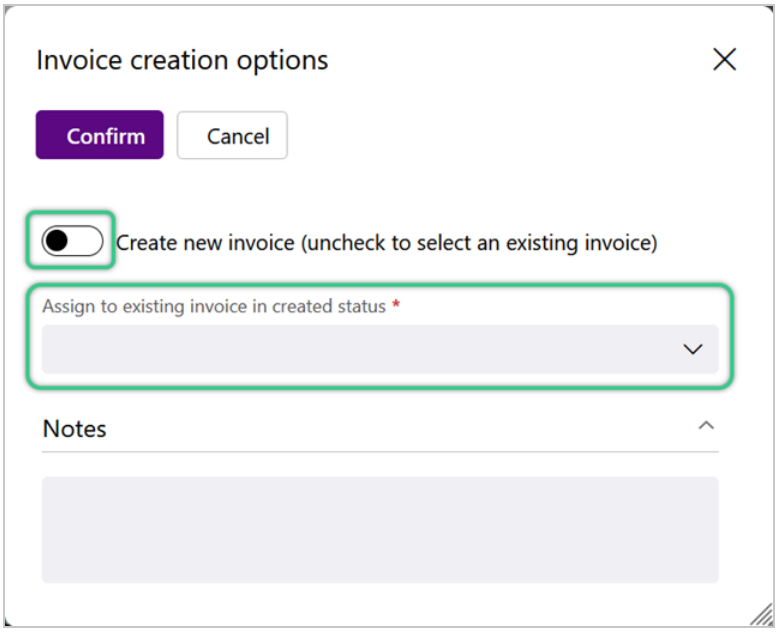


2. Review the details for the Invoice to be created are correct, then click the purple **Proceed** button.

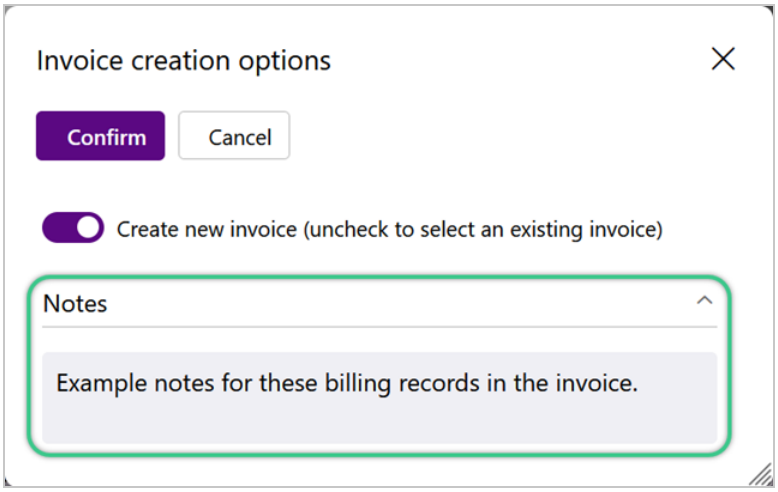


The **Invoice Creation Options** window will appear with the **Create New Invoice** toggle set to '**On**' by default.

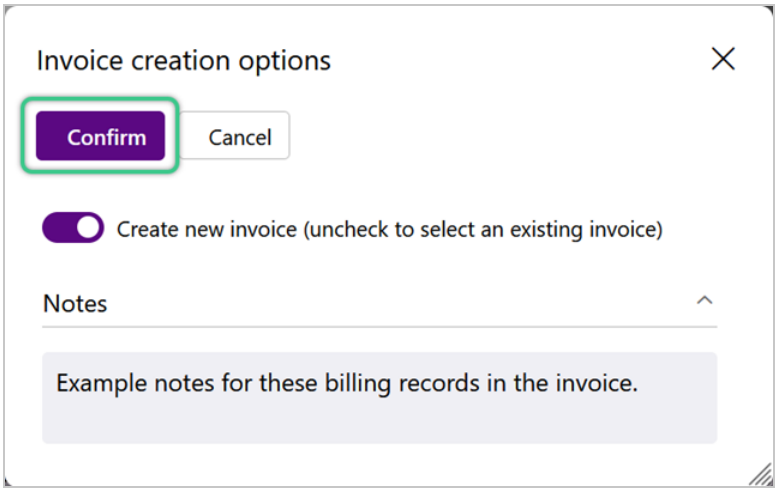
Toggle it off to select an existing Invoice to which the Billing Record will be assigned (as shown in the image).



3. Enter any **Notes** in the optional field.



4. When the new Invoice is ready to be created, click the purple **Confirm** button.



5. Once created, click the purple **OK** button.

The Billing Record Activity will now include the Invoice, and the Record will only appear when filtering for **Invoiced** Records.



The new Invoice will now be available for review and management from the Invoices Hub.

Cancel a Billing Record

Billing Records are created once a Contract has been Activated, and Activity related to that Contract's Lines have taken place. Invoices are created from Billing Records after activating a Billing Contract. To prevent invoicing, a Billing Record can be canceled from the Billing Records Hub.

Note

Once a Billing Record has been canceled, it cannot be restored.

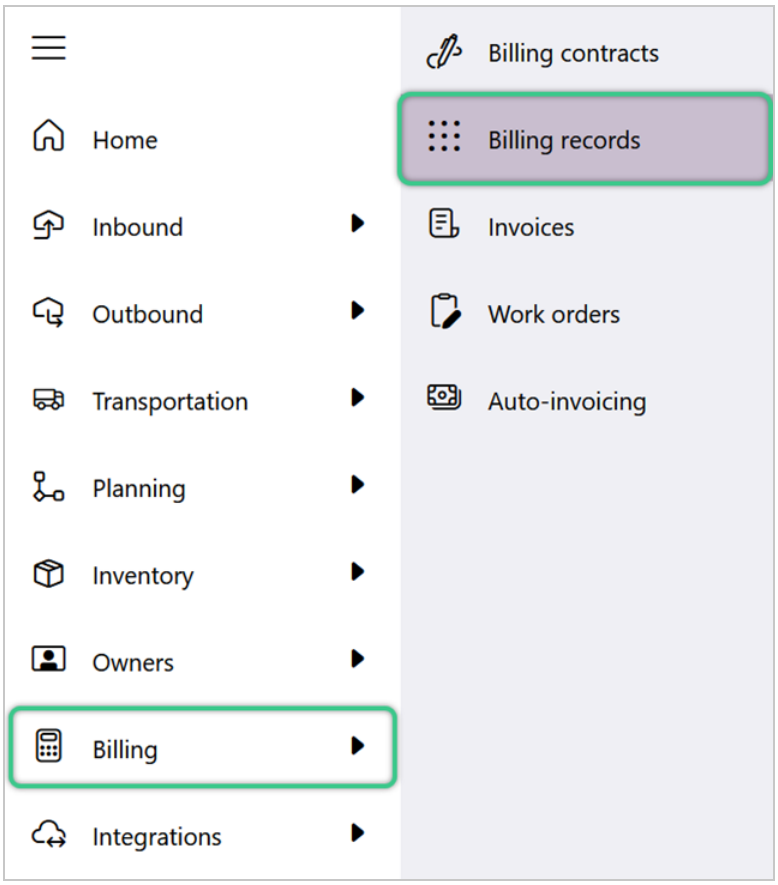
Prerequisites

- Owner
- Project
- Billing Record

Step 1. Open the Billing Records Hub

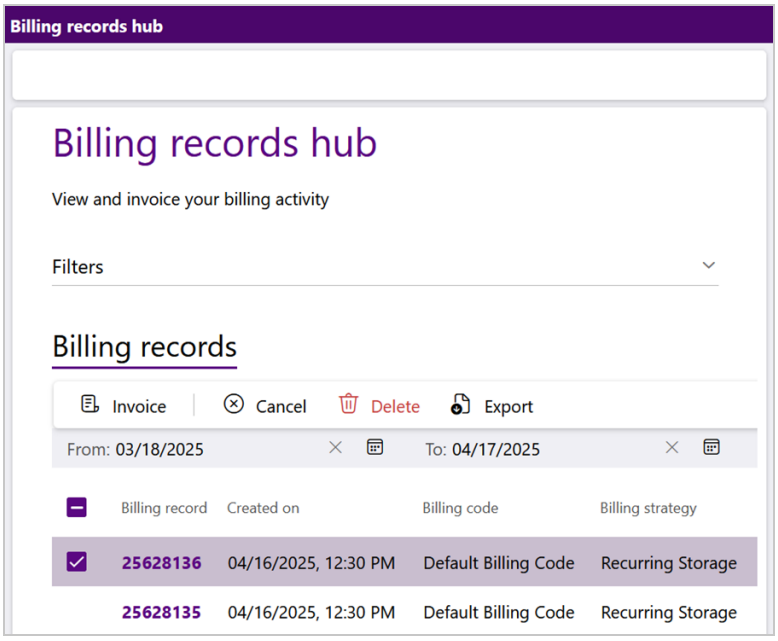
1. Click the **Billing** int the left navigation menu, then select **Billing Records**.

The **Billing Records Hub** will display.



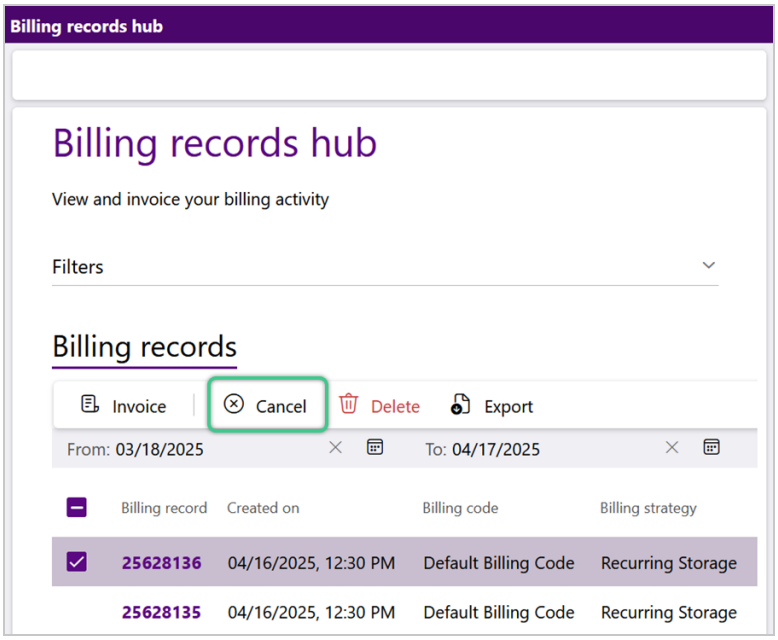
Step 2. Locate the Billing Record

1. Locate the **Billing Record** to be canceled and click the check box to select it.



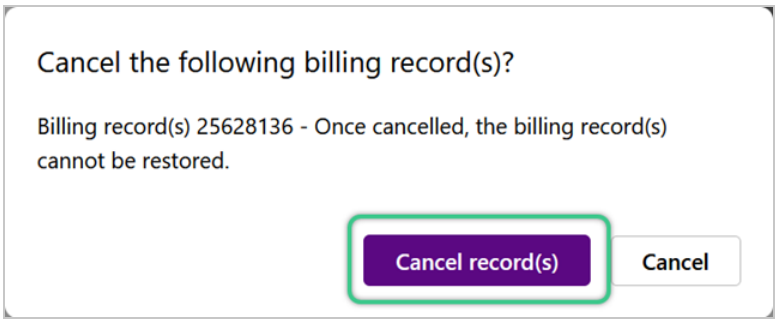
Step 3. Cancel the Billing Record

1. Click the **Cancel** option in the top Billing Records tab toolbar.



2. Review the details, then click the purple **Cancel Record(s)** button.

The Billing Record cannot be restored and can only be viewed when filtering for **Canceled** records.



Create an Invoice

Invoices are the actual bills for your customers. They can be created from the Invoices Hub, or from Billing Records listed in the Billing Records Hub. This tutorial explains how to create an Invoice directly from the Invoices Hub.

Note

Billing Records can only be assigned to one Invoice. Once assigned, a Billing Record will no longer be available for invoicing and can only be found when filtering for Invoiced Billing Records.

Prerequisites

- Owner
- Project
- Billing Contract
- Available Billing Records

Please Note

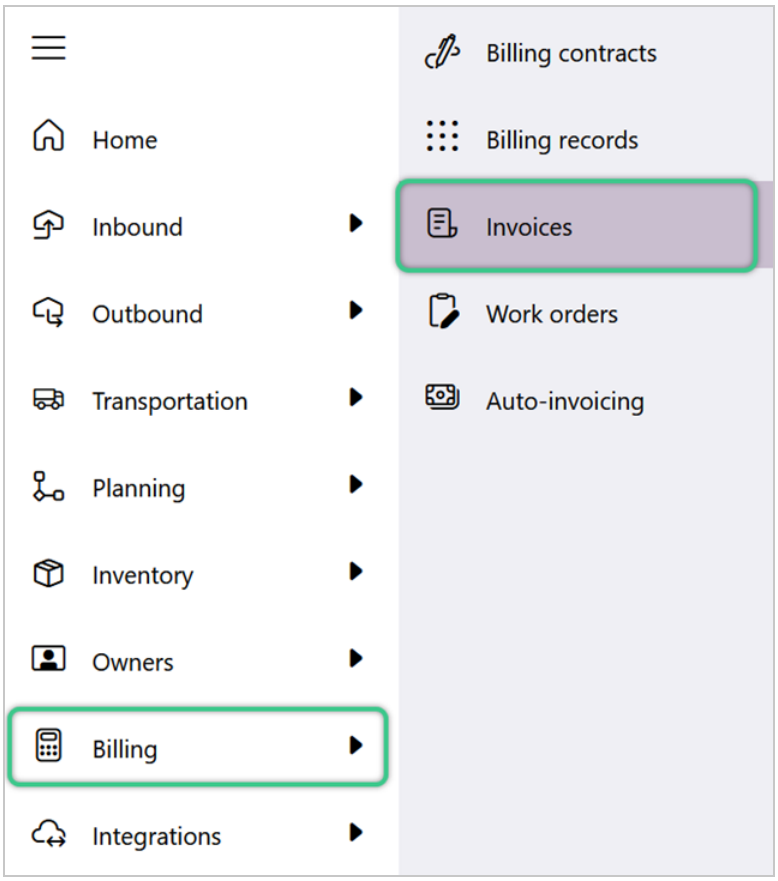
- **Operation Codes**, **Billing Strategies**, **Terms**, **Currencies**, and **Tax Schedules** must already be configured.
- Billing Contracts can be used along with external accounting software.

For assistance managing these billing presets or setting up external Billing, please contact Datex.

Step 1. Open the Invoices Hub

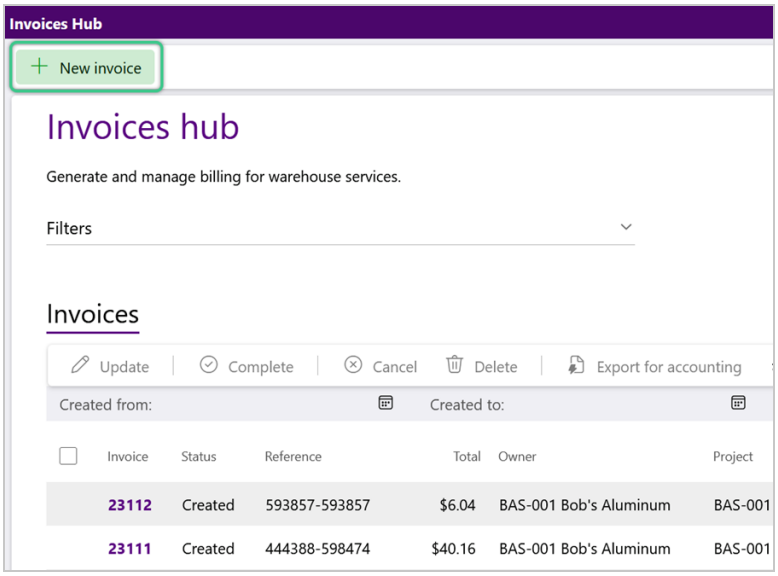
1. Click the **Billing** int the left navigation menu, then select **Invoices**.

The **Invoices Hub** will display.



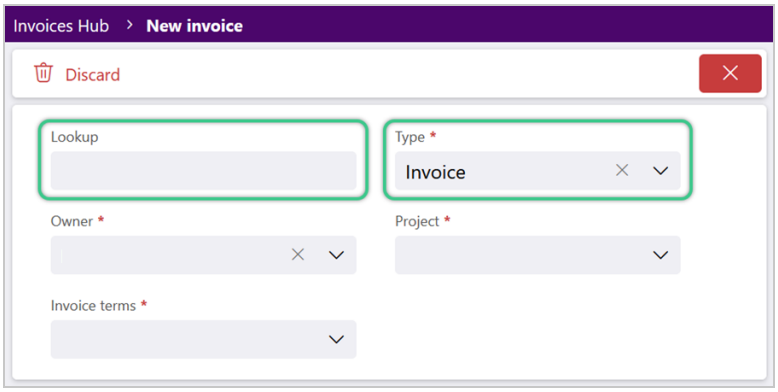
Step 2. Create a New Invoice

1. Click **+ New Invoice** in the top menu.



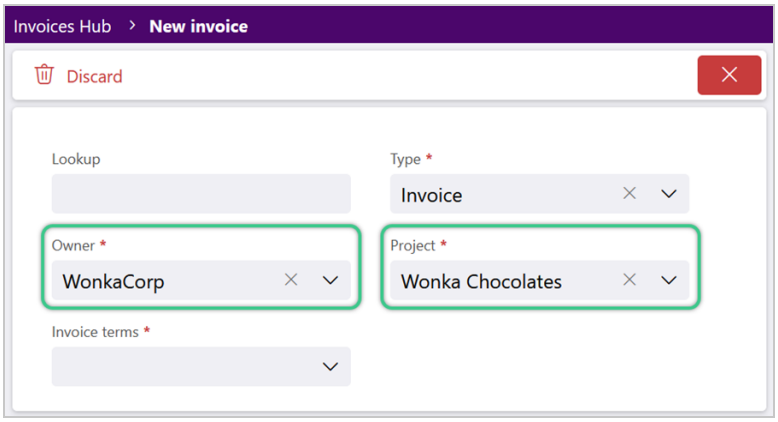
In the **Invoice Creation** form, the required **Type** defaults to Invoice.

The **Lookup**, when left blank, will be generated upon saving.

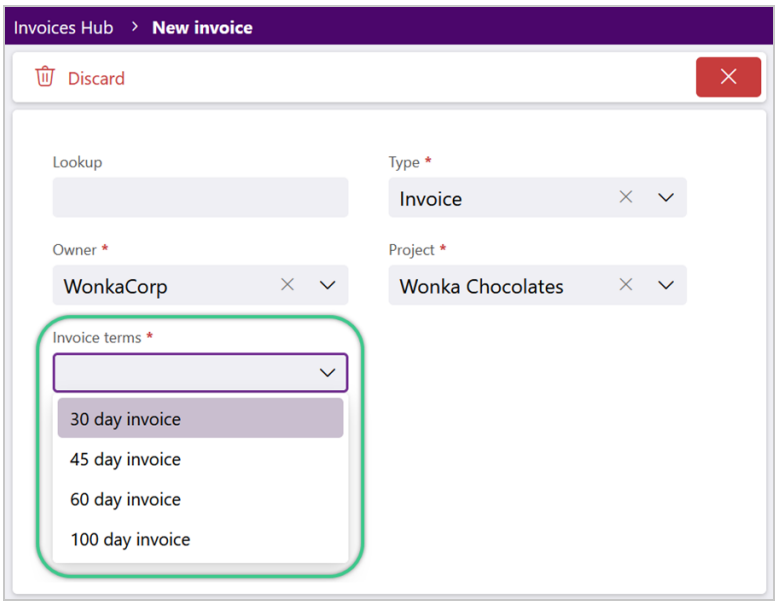


Step 3. Enter Basic Information

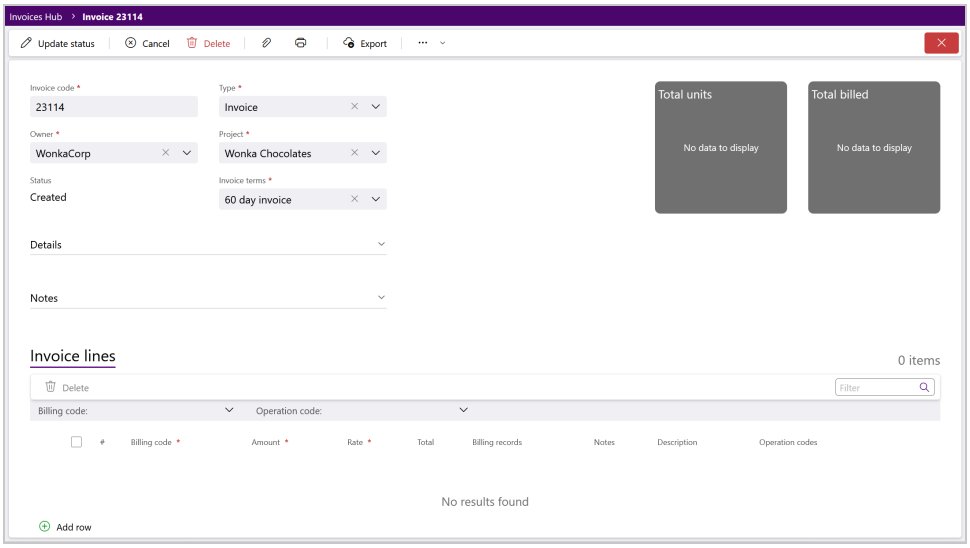
1. Select a required **Owner** and **Project** for the new invoice.



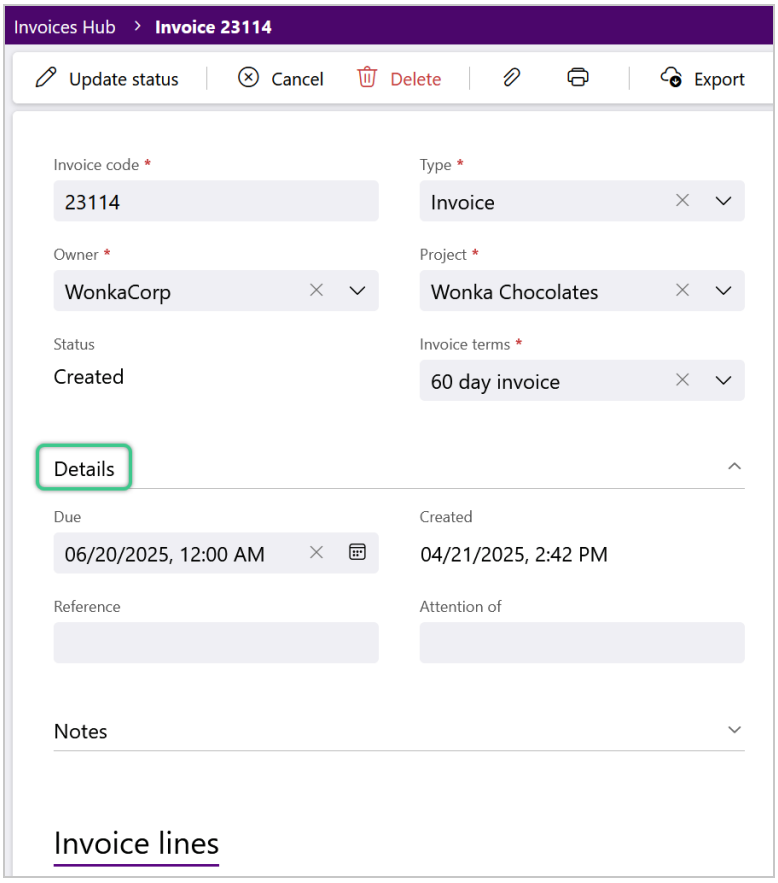
2. Select the required **Invoice Terms**, which will automatically populate the **Due Date** for the invoice.



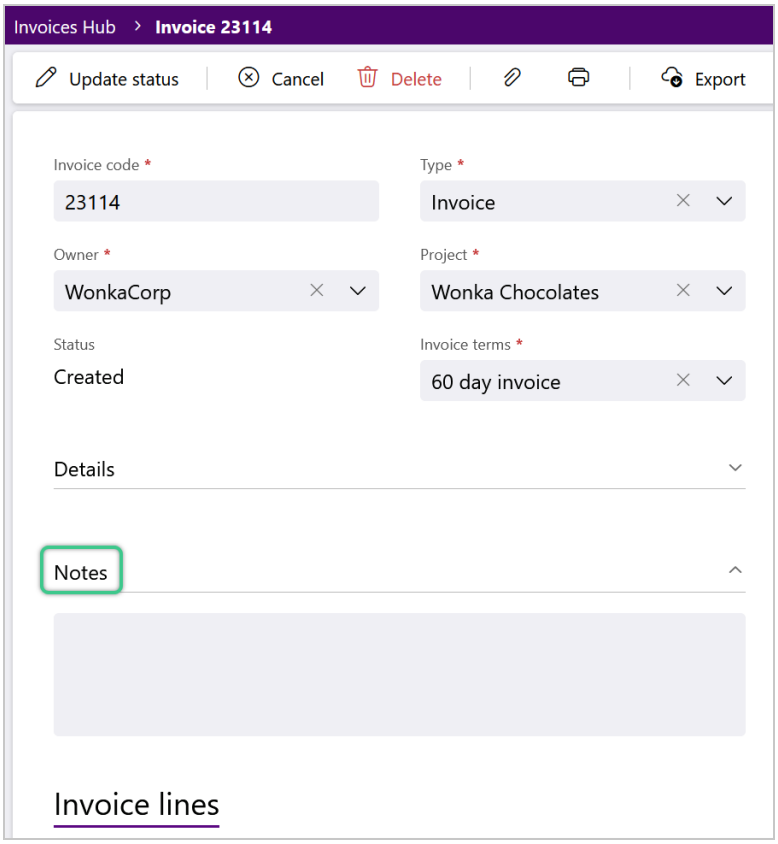
The screen will update to display the new Invoice for further data entry.



3. In the **Details** section, enter any optional information for the invoice.

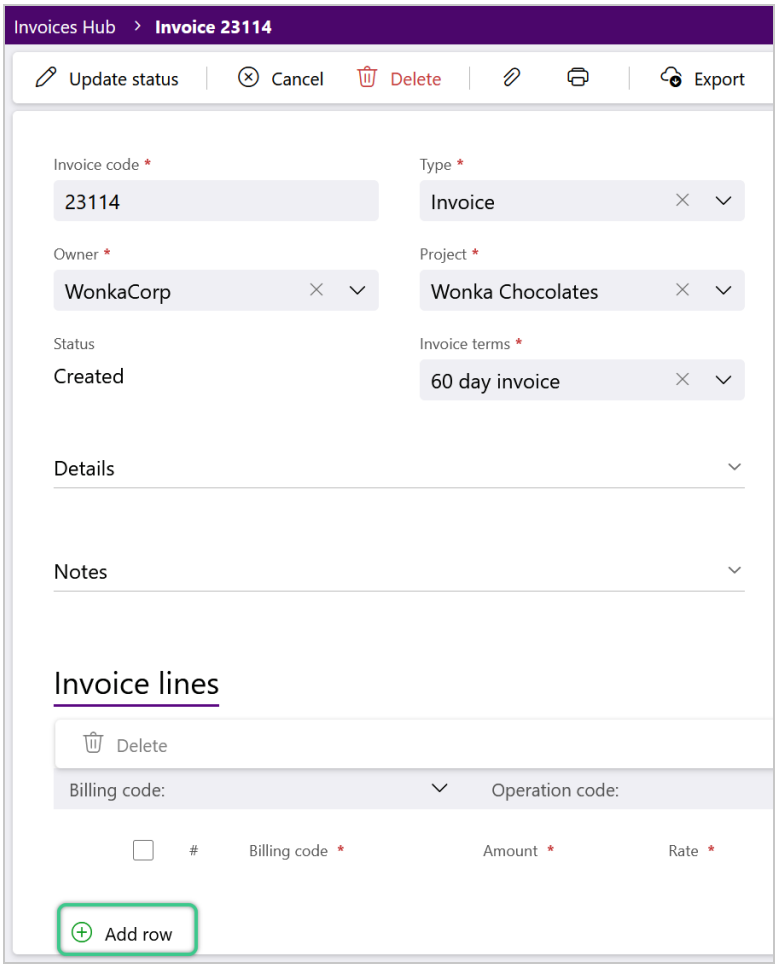


4. In the **Notes** section, enter any optional Notes for the invoice.

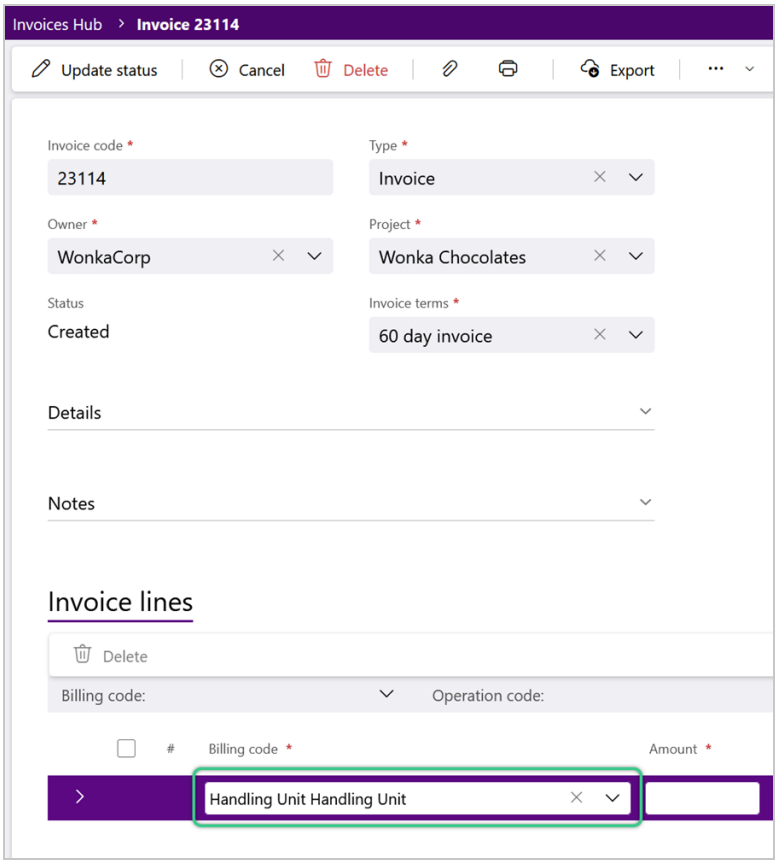


Step 4. Add Invoice Lines

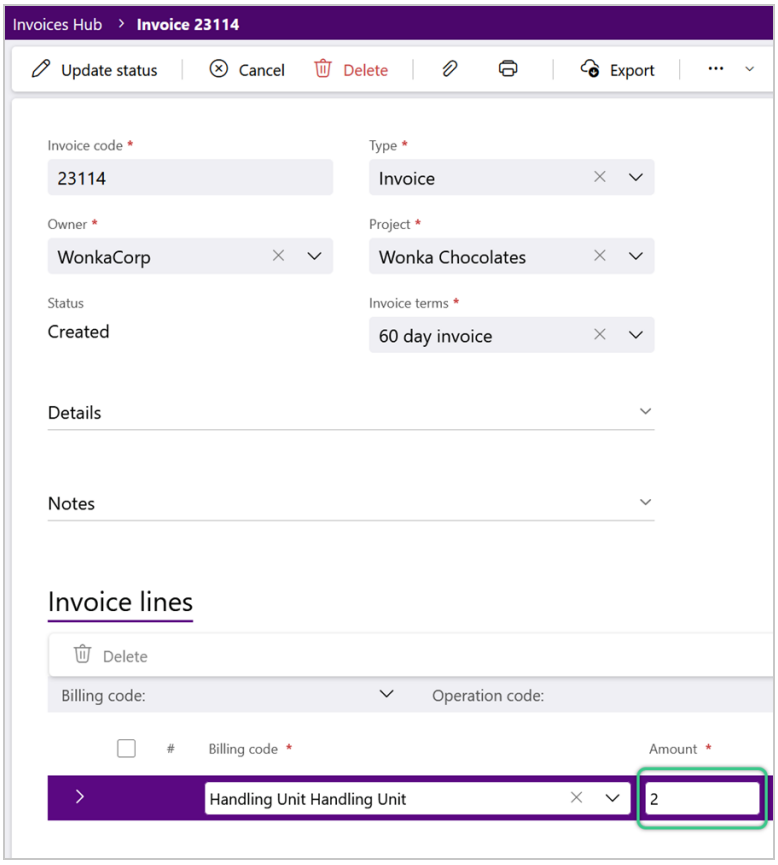
1. Click the green **+ Add Row** button in the **Invoice Lines** tab at the bottom of the invoice.



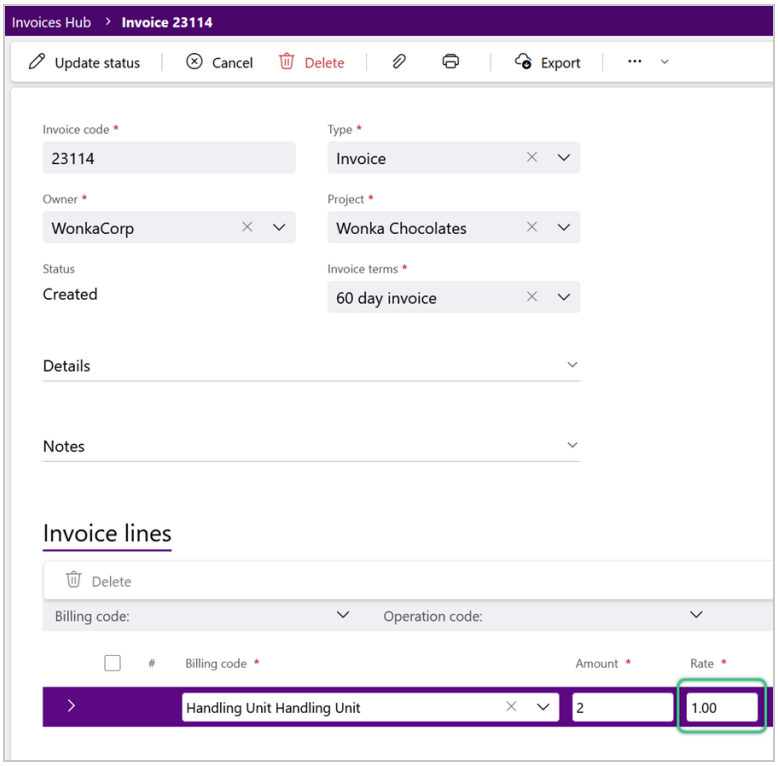
2. Select a required **Billing Code** for the Invoice Line.



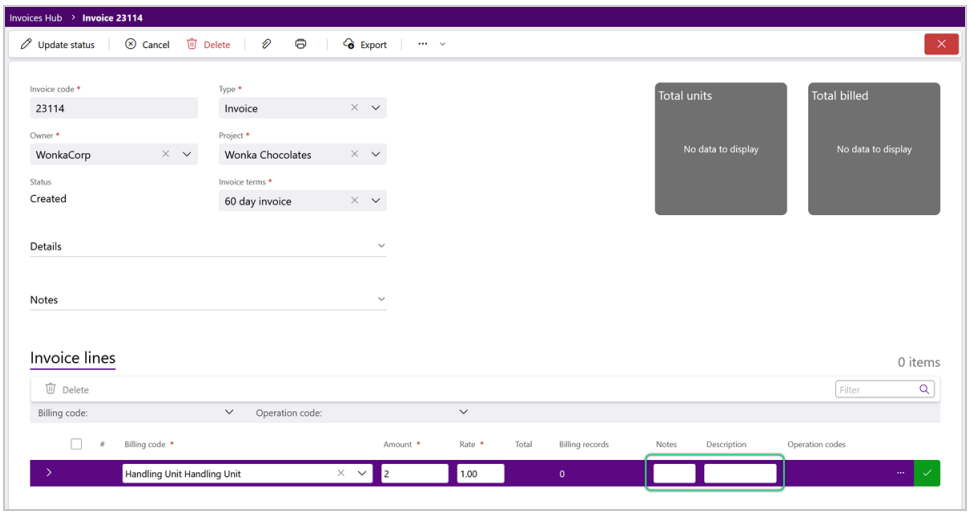
3. Enter the required **Amount** associated with the amount of work done.



4. Enter a **Rate** for the work. This number will be multiplied by the **Amount**.

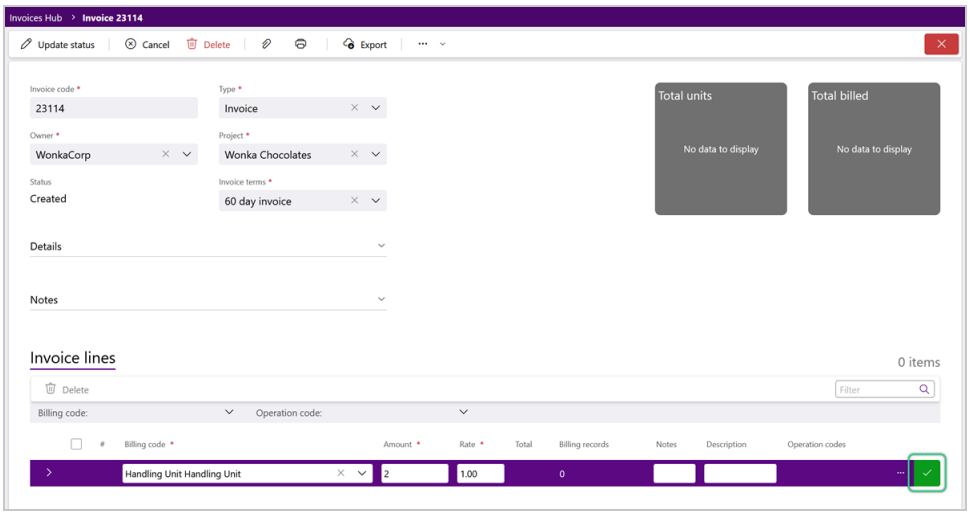


5. Enter any optional Notes or a Description for the Invoice Line.



6. Click the green check mark in the right column of the new Invoice Line to save it.

7. Repeat steps 1 - 6 to continue adding as many Invoice Lines as needed.



Note

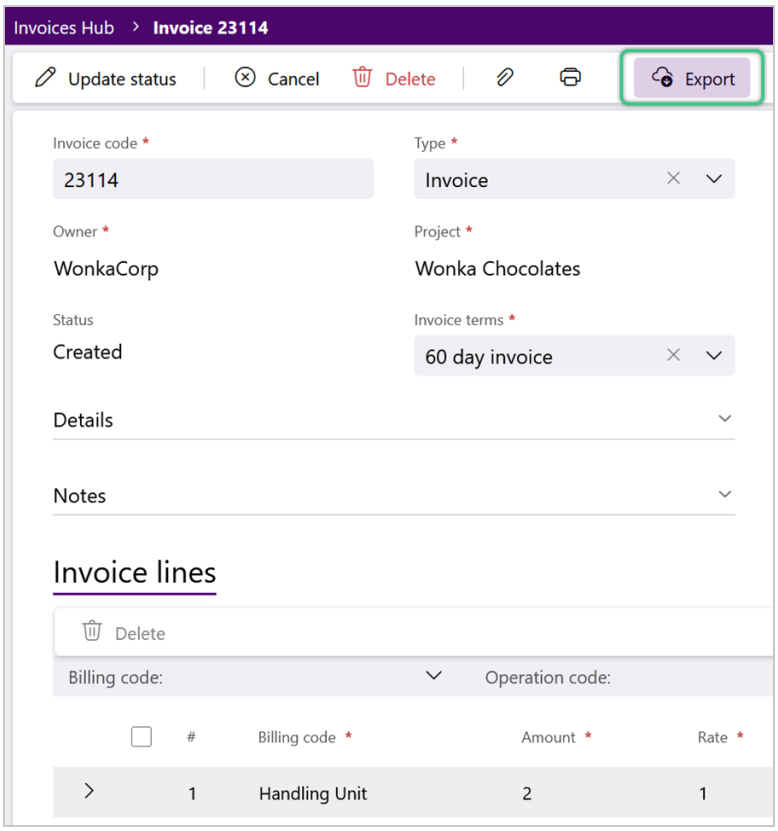
Invoice Lines are rounded according to the long-used standard for financial applications, commonly referred to as "**Bankers' Rounding**."

Step 5. (Optional) Export the Invoice

1. Export to accounting software, if applicable.

❑Important

Once Exported, you can no longer Edit the Invoice, or reassign any of its associated Billing Records.



Complete an Invoice

Once an Invoice has been paid, it can be completed from the Invoices Hub.

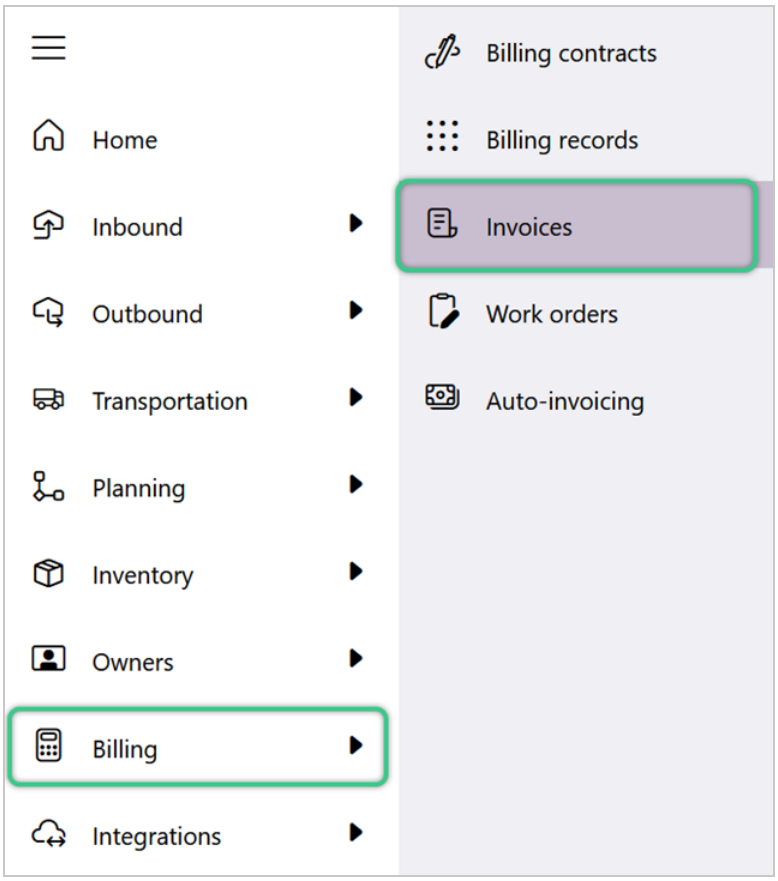
✠ Prerequisites

- Owner
- Project
- Billing Contract
- Available Billing Records

Step 1. Open the Invoices Hub

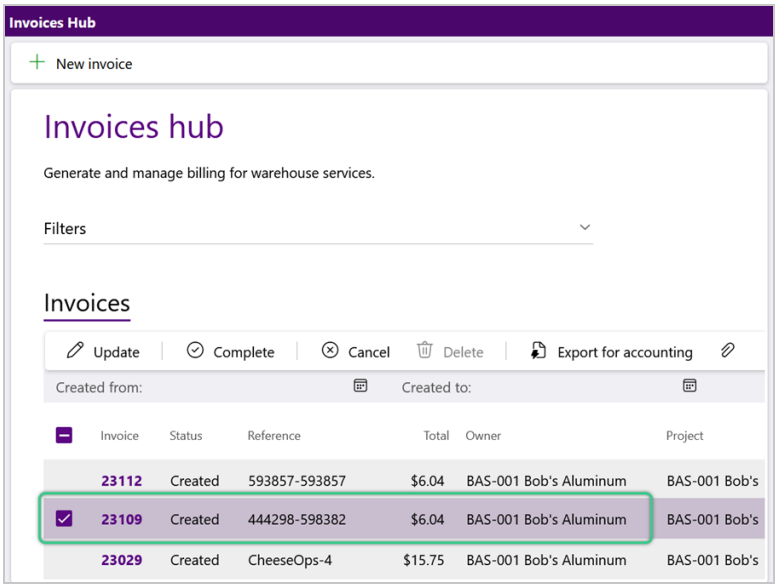
1. Click the **Billing** int the left navigation menu, then select **Invoices**.

The **Invoices Hub** will display.



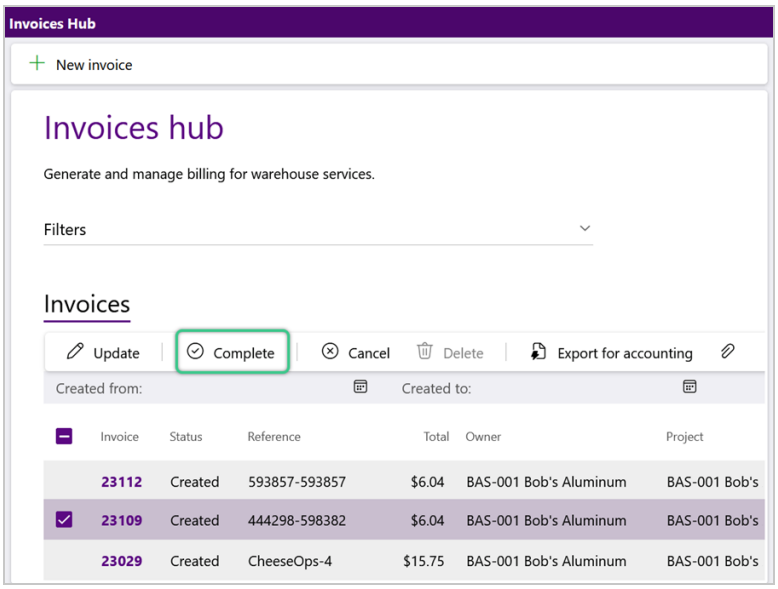
Step 2. Locate the Invoice

1. Locate the **Invoice** to be completed and click the check box to select it.

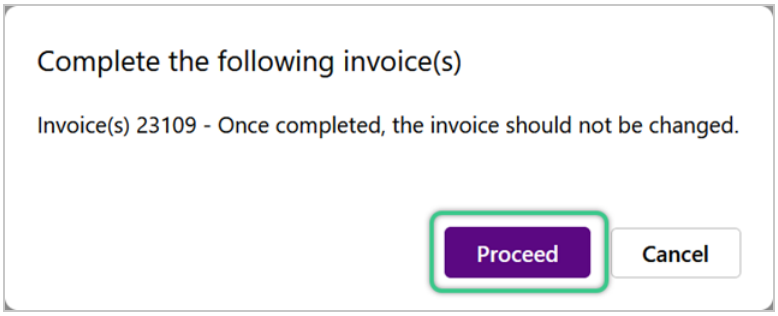


Step 3. Complete the Invoice

1. Click the **Complete** option in the Invoices tab toolbar.



2. Review that the details displayed in the **Complete Invoice** window are correct, then click the purple **Proceed** button.



3. Click the purple **OK** button in the confirmation window.

The Invoice will be completed and can no longer be edited.



Create a Work Order

Work Orders are separate from Inbound and Outbound Orders. They group Accessorial Tasks together, assigning them to a specific Owner and Project. Accessorial Charges are simple tasks or procedures that take place in the Warehouse.

✠ Prerequisites

- **Owner**
- **Project**
- Warehouse
- Locations
- Accessorial Charges

☪ Please Note

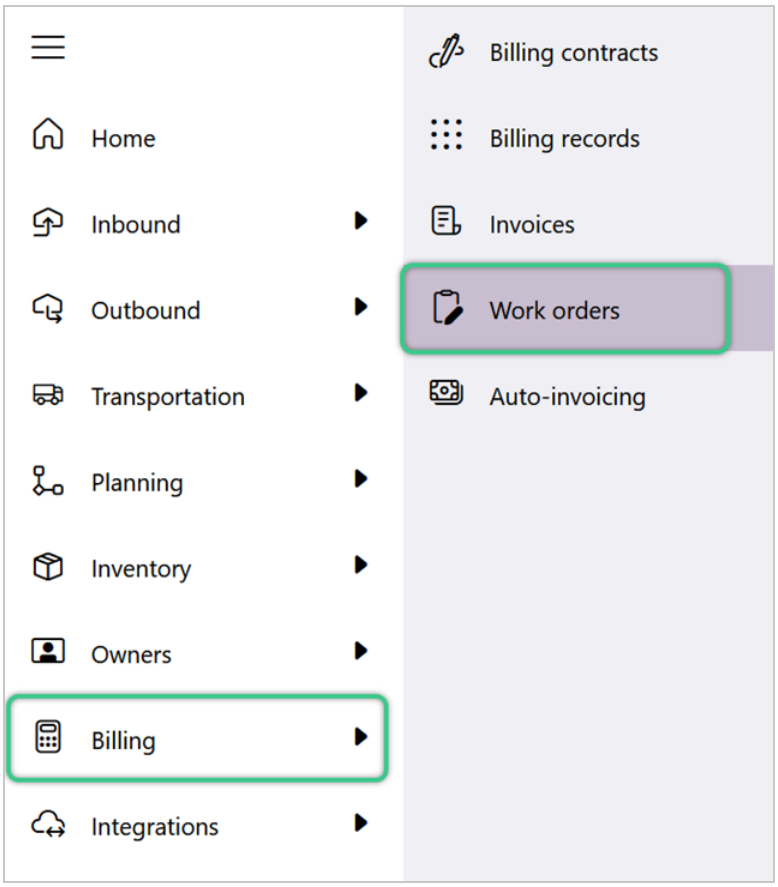
- **Operation Codes**, **Billing Strategies**, **Terms**, **Currencies**, and **Tax Schedules** must already be configured.
- Billing Contracts can be used along with external accounting software.

For assistance managing these billing presets or setting up external Billing, please contact Datex.

Step 1. Open the Work Orders Hub

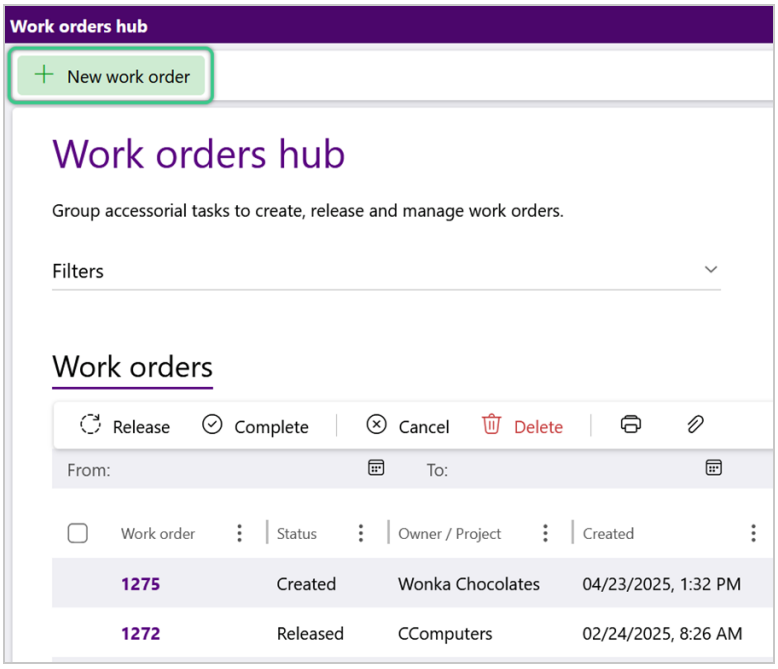
1. Click the **Billing** int the left navigation menu, then select **Work Orders**.

The **Work Orders Hub** will display.



Step 2. Create a New Work Order

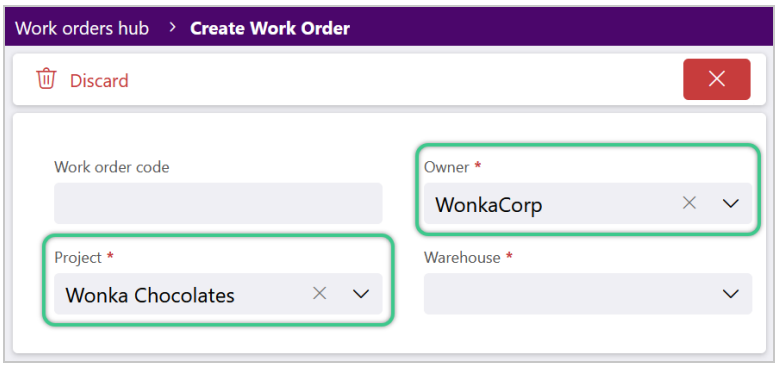
1. Click the **+ New Work Order** button in the top toolbar.



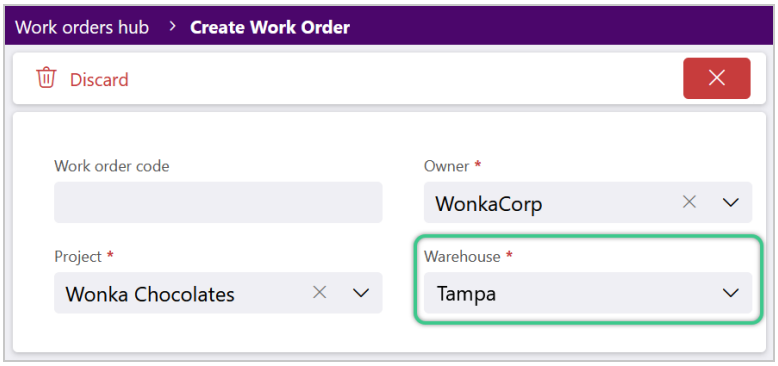
Step 3. Enter the Work Order Basics

The **Work Order Code**, when left blank, will be generated upon saving.

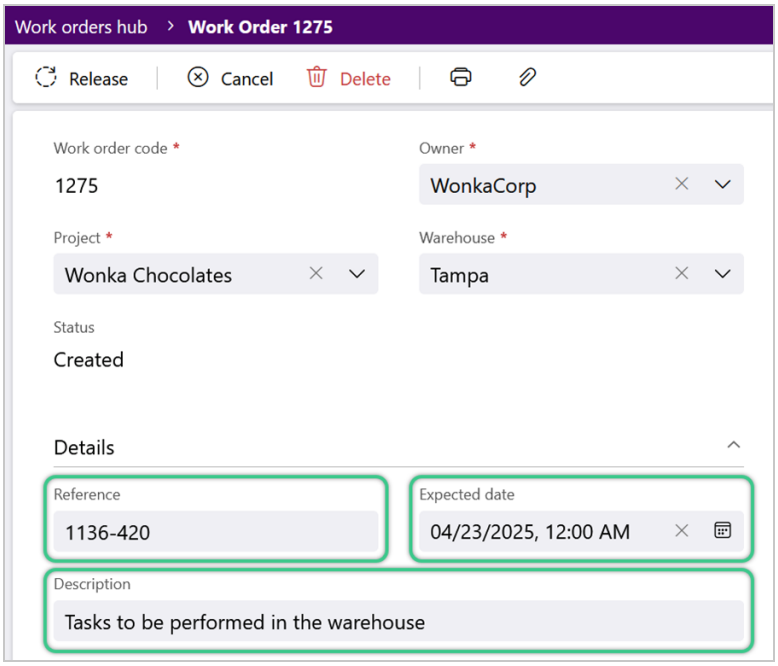
1. Select the required **Owner** and **Project** for the Work Order.



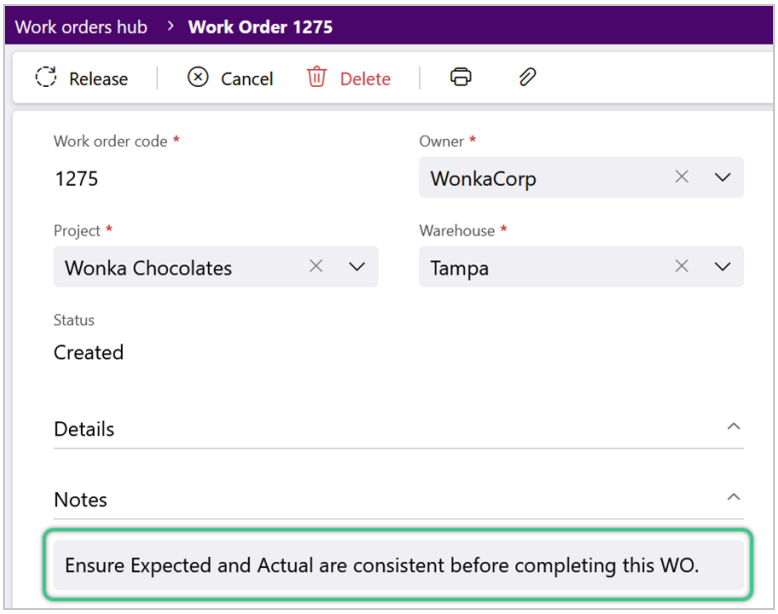
2. Select the **Warehouse** where the Work Order tasks will be performed.



3. (Optional) In the updated Work Order form, enter a **Reference** number, **Expected Date**, or **Description** in the **Details** section.

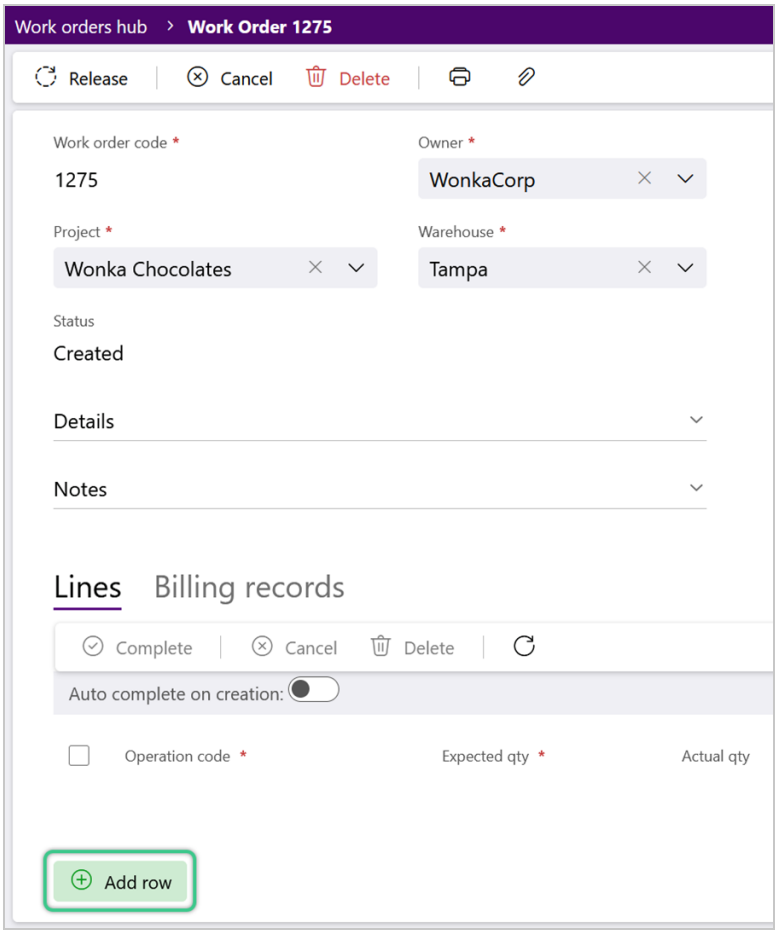


4. (Optional) Enter any **Notes** in the **Notes** section.



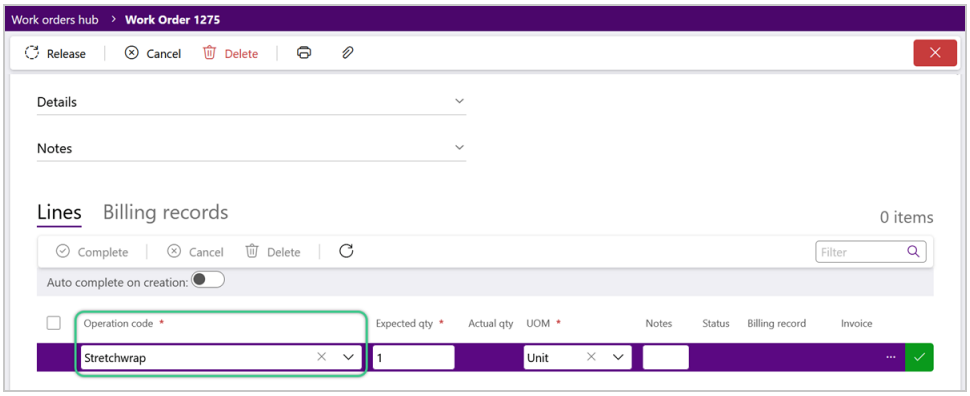
Step 4. Add Tasks to the Work Order

1. Click the green **+ Add Row** option in the **Lines** tab at the bottom of the order to add a task.



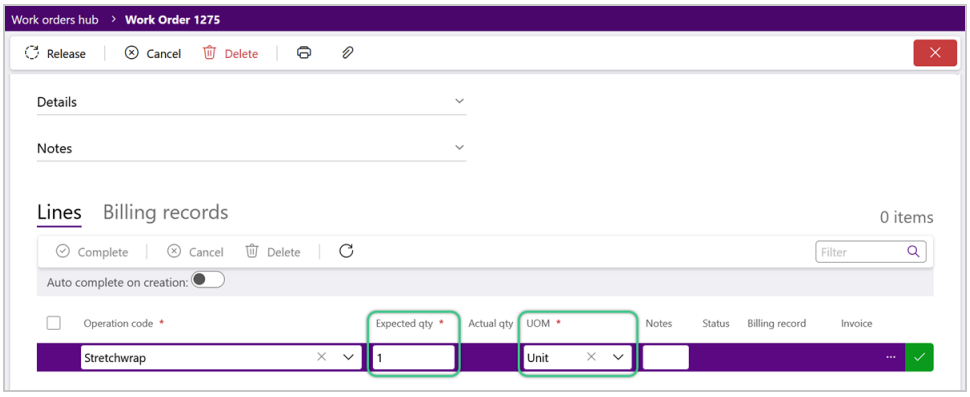
2. Select the **Operation Code** for the Accessorial Charge.

> **Note**
>
> These Accessorial Charges must already exist in the project's active Billing Contract.

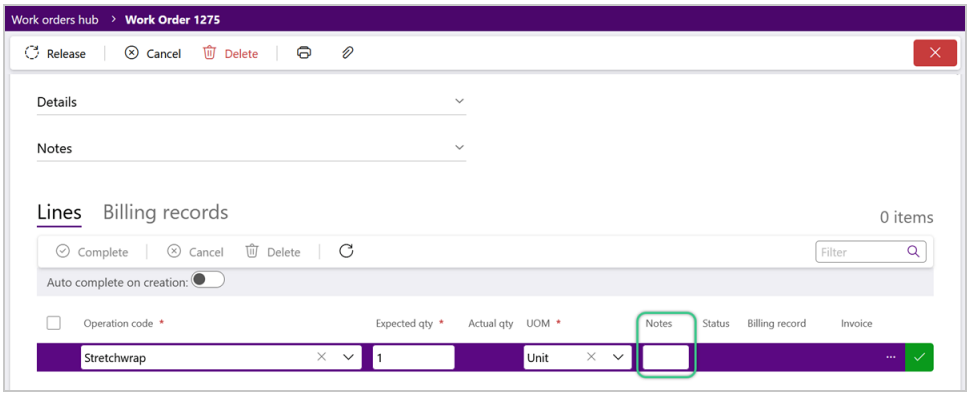


3. Enter the **Expected Qty** of work for the Order.

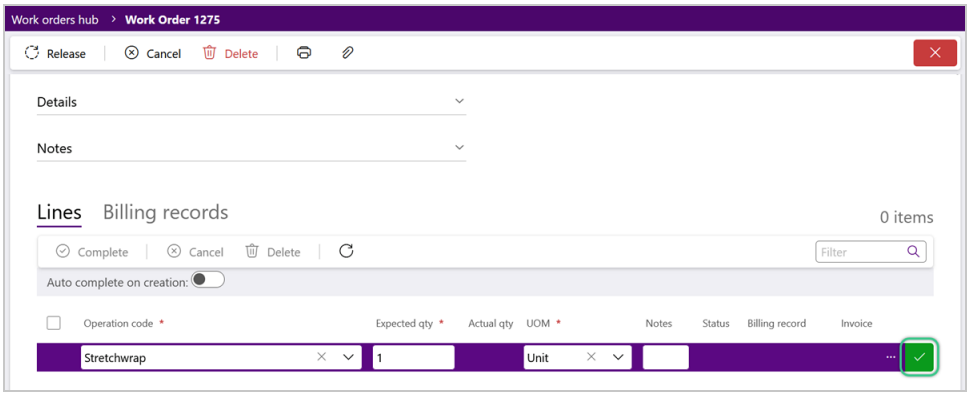
For example, how many feet of shrink wrap expected, or how many labels will be applied. This number is in terms of the **Expected UOM** (Unit of Measurement).



4. (Optional) Enter any **Notes** specific to this Line's task.



5. Click the green check mark in the right column of the new Lines to save it to the Order.



Repeat these steps 1-5 to continue adding as many Lines of tasks as needed for the Work Order.

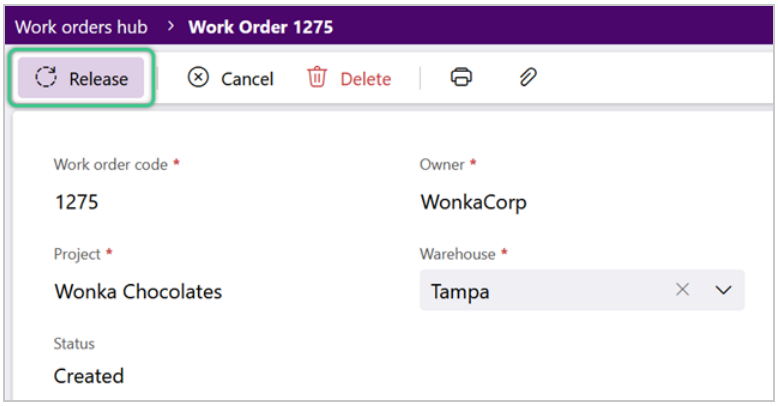
Step 5. Release the Work Order

Once all Accessorial Charges have been added as Lines to the Work Order, the Order can be released.

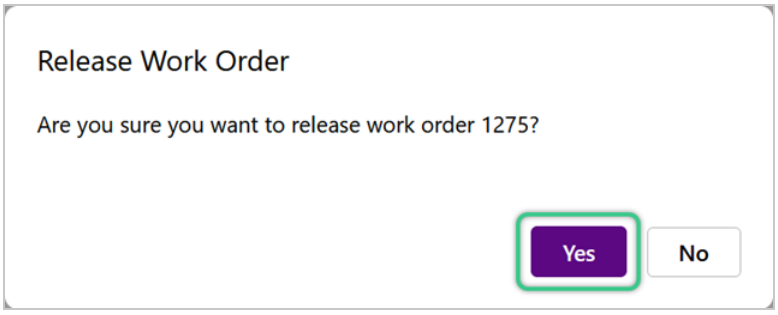
Tip

If the Work Order is not ready to be released, you can wait and release it at a later time.

1. To release the Work Order now, click the **Release** button in the top toolbar.

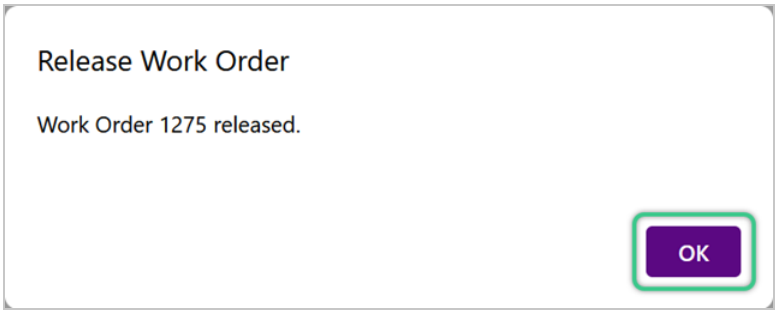


2. Review the details are correct, then click the purple **Yes** button to Release the Work Order.



3. Click the purple **OK** button in the confirmation window.

The Work Order will now be available for the tasks to be performed.



Once all the tasks have been performed, the Work Order can be **completed**.

Complete a Work Order

Work Orders are separate from Inbound and Outbound Orders. They group Accessorial Tasks together, assigning them to a specific Owner and Project. Accessorial Charges are simple tasks or procedures that take place in the Warehouse.

While Work Order tasks can be performed in Footprint or on any Footprint mobile device, the Work Order itself can only be completed from within Footprint. Completing a Work Order closes it out and creates the associated Billing Records.

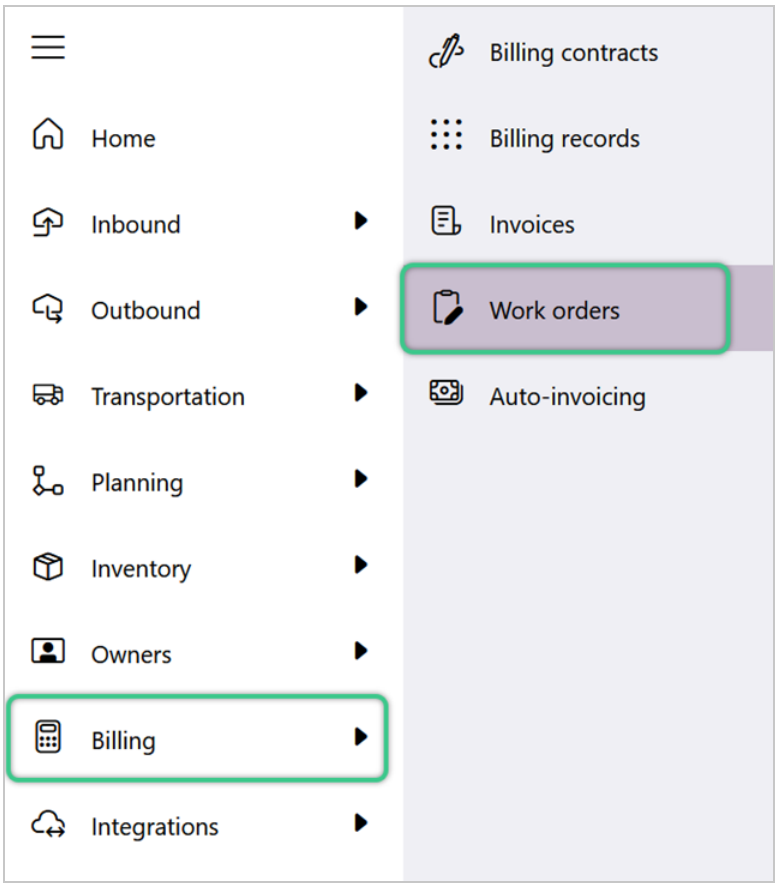
✠ Prerequisites

- Owner
- Project
- Warehouse
- Locations
- Accessorial Charges
- A Work Order to Complete

Step 1. Open the Work Orders Hub

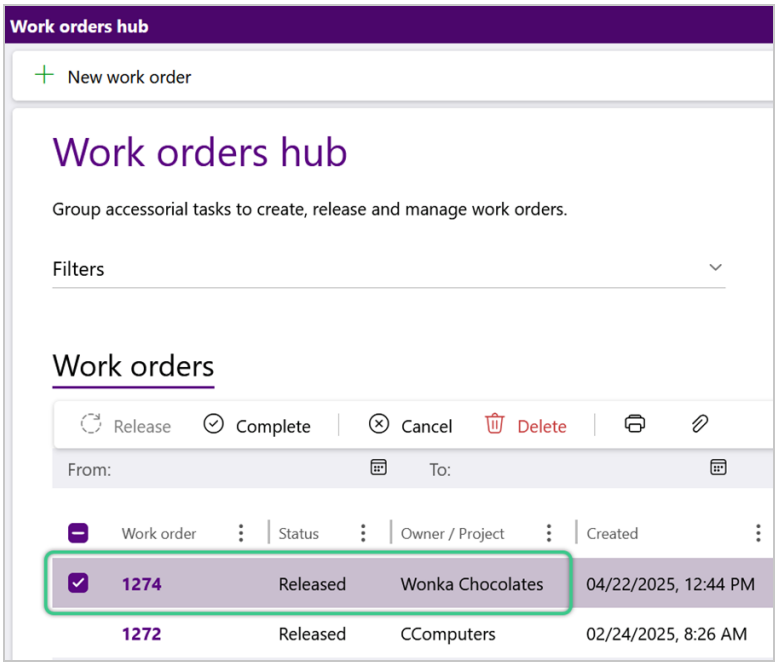
1. Click the **Billing** int the left navigation menu, then select **Work Orders**.

The **Work Orders Hub** will display.



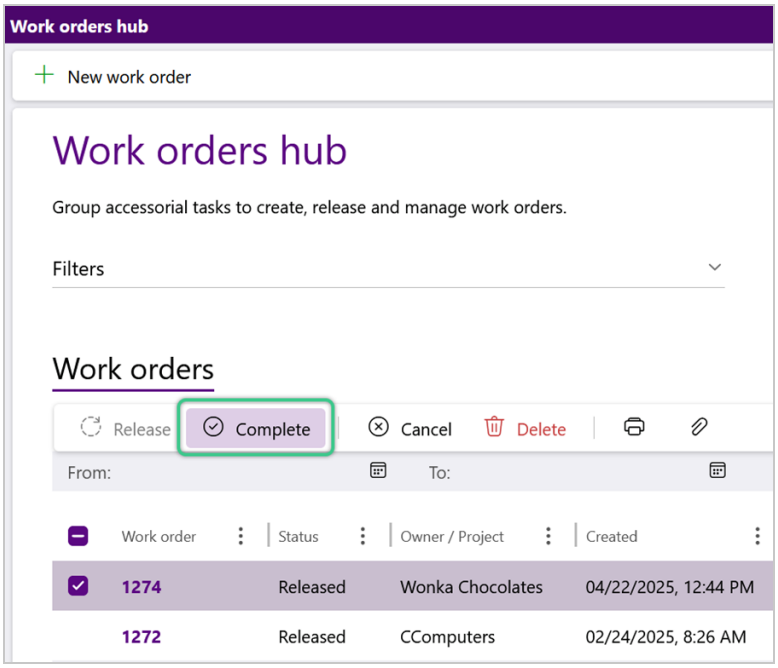
Step 2. Locate the Work Order

1. Locate the Work Order to be completed and click the check box to select it.

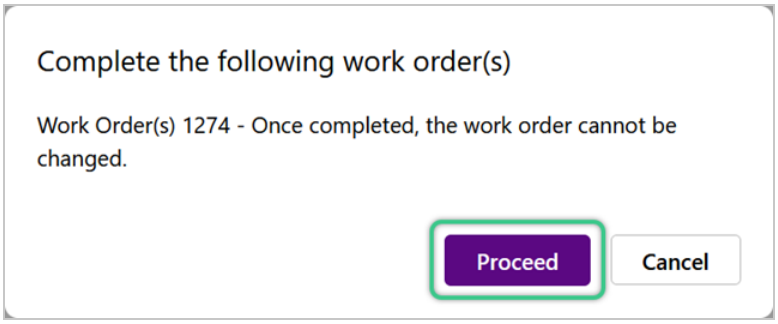


Step 3. Complete the Work Order

1. Click the **Complete** option in the top Work Orders toolbar.



2. Review the details are correct, then click the purple **Proceed** button to Complete the Work Order.



3. Click the purple **OK** button in the confirmation window.

This will close out the Order and create any relevant Billing Records.



The completed Work Order will now only appear when filtering for **Completed** Work Orders.