September 2021

Datex
FootPrint WMS
User Manual

datex

Table of Contents

Create an Inbound Order

The 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.

✅ **Prerequisites**

- Owner
- Project
- Warehouse
- Locations
- Materials
- Carrier

Step 1. Create a new Inbound Order

1. In the FootPrint Explorer, click the **Operations Management** section.

2. Double-click **Create Order** underneath the **Inbound** and **Operations** headings.

A new Inbound Order will automatically be created for you.

Step 2. Enter Basic Information

The top part of the screen is where you'll find general information about your Order. Much of this is handled by the system, which creates an Order number for you that you can change if you'd like.
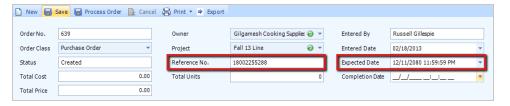
1. Select the **Owner** of the Materials that will be Shipped to you.

2. Select the **Project** that the Shipping Materials belong to.

3. (Optional) You can select the **Expected Date** for the Order if you'd like, and enter a **Reference Number** to associate with the Order, but neither have an effect on the system, and are just for reference purposes.

Step 3. Fill out the Order Header

The first tab you will see is the **Order Header** tab, which contains information about the Vendor from whom you are Ordering.

If you have an Account set up for the Vendor, click the drop-down arrow and select them from the list. You can also click the **magnifying glass icon** to open a pop-up window where you can search for the Account, or even create a new one.

If you do not have any Accounts set up, or you are sending it somewhere that doesn't have an Account associated with it, you can manually fill in the Contact information here.
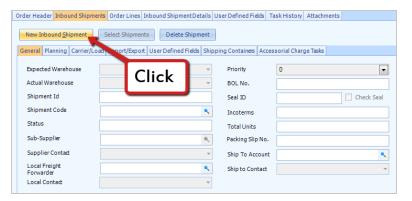
Step 4. Set up the Inbound Shipments

The Inbound Shipments tab allows you to create multiple Shipments for the Order, and as a result of this, there is a lot of variable information you can enter here. A set of tabs specifically for Inbound Shipments becomes available when you select the Inbound Shipments tab, but don't worry - Shipments aren't too complicated.
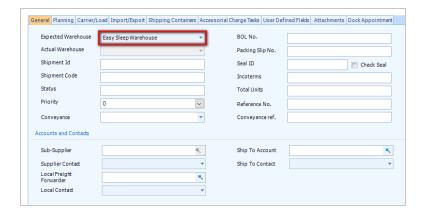
Step 4.1. Create a new Inbound Shipment

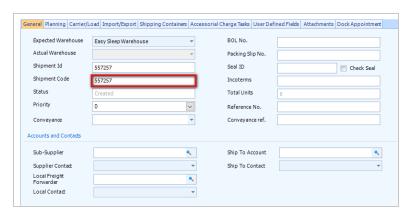Underneath the Inbound Shipments tab, click **New Inbound Shipment**.

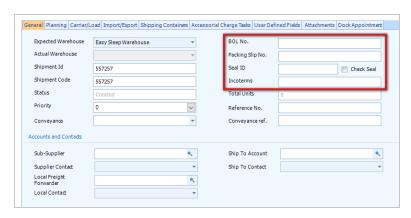## Step 4.2. Fill out the General Information

1. Confirm you have selected the **Warehouse** you're expecting to the Materials to be Shipped to.

2. The system will automatically create a **Shipment ID** and a **Shipment Code** for you. You can change the **Shipment Code** if you'd like, even selecting a pre-existing Shipment by clicking the magnifying glass icon 🔍.

3. (Optional) Fill in any additional information you'd like for the Shipment, including **Priority**, **Seal IDs**, a specific **Bill of Lading** number, or any **Notes** you may want to include.
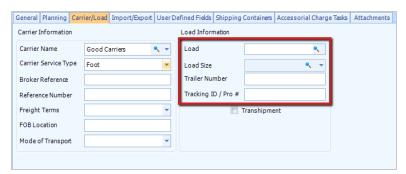

Step 4.3. Enter the Carrier Information

1. On the **Carrier/Load** tab, select the **Carrier** and **Carrier Service Type** (Ground, Air, Next Day, whatever you have set up for your Carrier) from the drop-down lists.
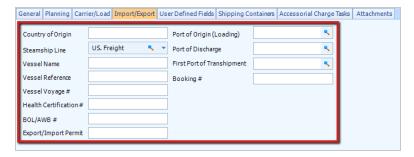

2. (Optional) If you have any relevant **Load Information**, and have already set up Load Containers in the Load Container Management section, you can enter it or select it from drop-down lists here.

Step 4.4. (Optional) Enter International Shipping Information

If the Shipment is from overseas, you may want to fill out any relevant information in the **Import/Export** tab.
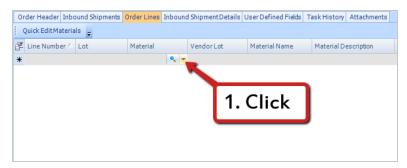

You can repeat this process for as many individual Shipments as you'll be using in your Order, but as long as you have at least ONE Shipment for your Order, you will be able to proceed.

Step 5. Select Inventory to Receive

Now we get down to the actual Order itself: the inventory to Receive. Under the **Order Lines** tab, we are able to specify just what it is that we'd like to have shipped to us.

1. Click directly in the greyed out row of the list pane, and a new entry for a Material will be created automatically.
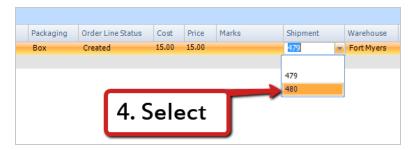

2. Click the drop-down arrow under the **Material** heading to open a list of Materials available to the Owner and Project you are creating an Order for, and select the Material you'd like to add. In a similar fashion, you can specify the **Vendor Lot** you'd like to Receive.

3. Specify the quantity of the Material you'd like to add to the Shipment by clicking the **Quantity** field and entering the amount desired. Make sure you have the correct **Packaging** Type selected. If you'd prefer, you can instead enter a **Net** or **Gross Weight** to specify in the same way; just make sure to select the appropriate **Unit of Measurement**.

4. If you've created multiple Shipments, you will need to associate inventory with each one. Select the appropriate **Shipment** from the drop-down list.

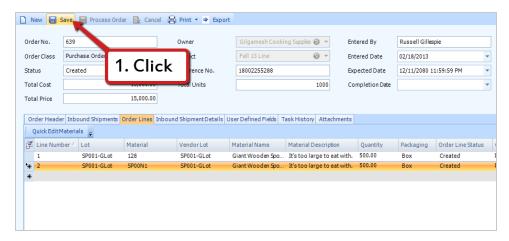You can continue using this method to add Materials to each Shipment you've set up in your Order.

Step 6. Save and Process the Order

Finally, we are ready to Save and Process the Order we've just filled out. You can Save your progress at any time to keep the Order information in the system, but you will not be able to continue to Inbound procedure until you've Processed the Order, allowing you to begin Receiving.
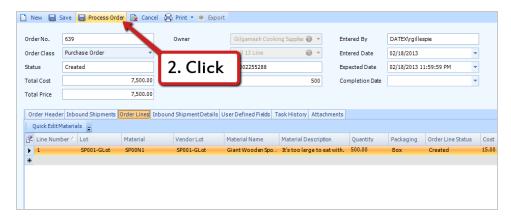
⚠ Note

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

1. Click **Save** to save the Order.

2. Click **Process Order** to save and confirm the Order, readying the system to begin its execution.
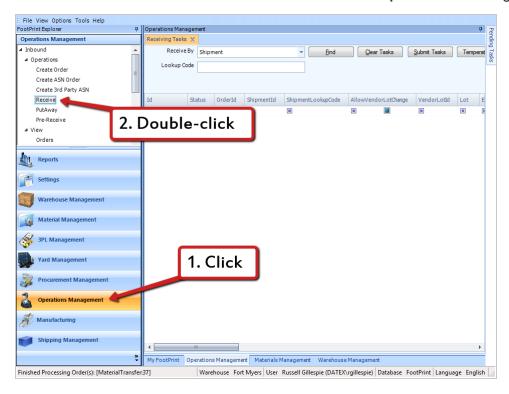
Create an Inbound Order

Receive a Shipment

When you Receive a Shipment, you add new Inventory to your Warehouse, assign the Materials to License Plates, and enter Lot information, weight information, and Serial Numbers where necessary.

✔ Prerequisites

- Processed Inbound Order
- Dock Locations

Step 1. Open the Receive section

1. Click the **Operations Management** module in the FootPrint Explorer.

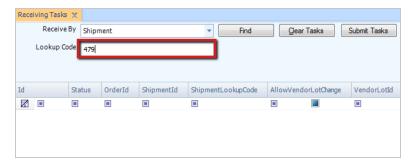2. Double-click the **Receive** section under the **Inbound** and **Operations** headings.

Step 2. Search for the Shipment or Order

You can search for your Shipment either by the Order or the Shipment Number.

1. Select how you'd like to search from the **Receive By** drop-down menu.
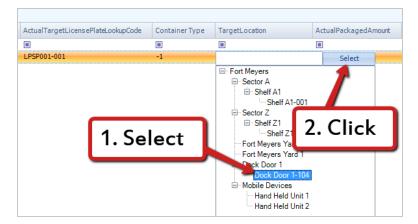
2. Enter the **LookUp Code** for the Shipment or Order.
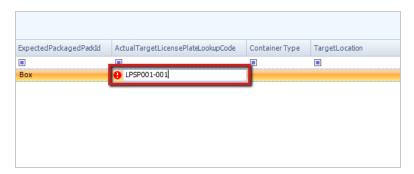

3. Click the **Find** button.

Step 3. Receive

A list of the remaining Receive Tasks will populate. If you do not have a Default Receiving Location set, you will see a pop-up warning you about it. To learn more about Receiving Location, see the Setting Up a Warehouse tutorial.
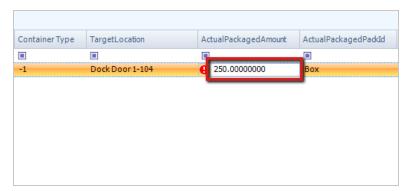
1. If you do not have a Default Receiving Location set, enter the **Location** you'll be Receiving to by clicking the **magnifying glass icon** and selecting the Location.

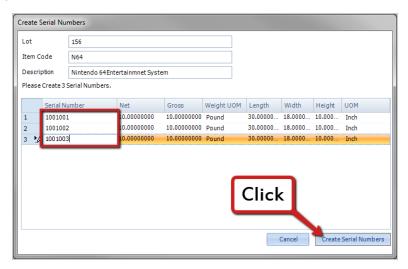2. Click **Select** to confirm the Location.

3. Enter the **License Plate** the Received Materials will be assigned to. You can enter an existing License Plate, or create a new one by typing in the LookUp Code here.
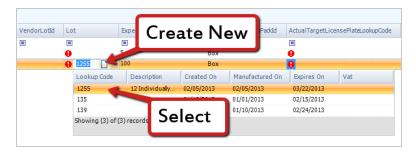

4. Enter the **Quantity** you are Receiving, or if the Material is measured by Weight, enter the **Weight** you are Receiving.

5. If your Material is Serial Controlled, you will also need to create Serial Numbers for the Shipment. A pop-up window will open for you to do so. Enter them, then click **Create Serial Numbers**.
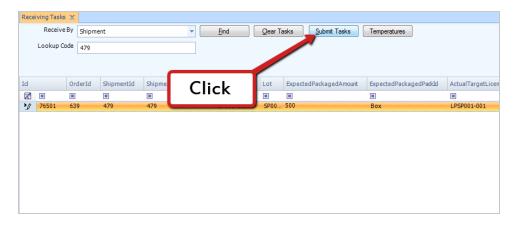
6. If the Material you are Receiving is Lot Controlled, you will need to enter a **Lot**. Pick one from the drop-down menu, or click the **page icon** ▯ to create a new Lot.

At this point, you can continue filling out information for each Task you'd like to complete, or you can move directly to submitting what you've done.

7. Click the **Submit Tasks** button.

Once you've Submitted the Task, all remaining Tasks will be left in the window.
Continue Receiving this way until you've Received all remaining Materials.
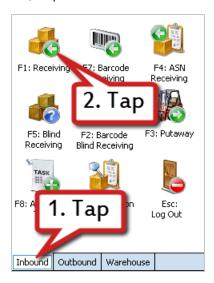
Receive Inventory

Receiving on the Mobile Device will confirm a Shipment has arrived in the Warehouse, and assign new Inventory to License Plates.

✅ Prerequisites

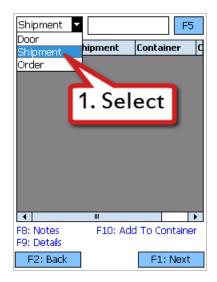- Inbound Order
- Dock Locations

Step 1. Open the Receive section

1. Tap the **Inbound** tab.
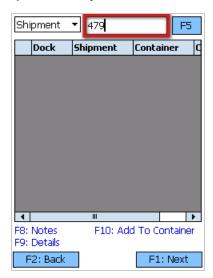
2. Tap the **Receiving** section, or press **F1**.

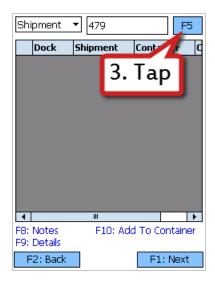
Step 2. Search for the Shipment, Order, or Door

1. From the drop-down list, select whether you'd like to search by **Shipment** Number, **Order** Number, or **Door** to Receive from.
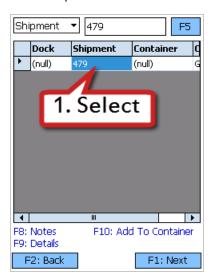
2. Scan or enter the **LookUp Code** for your search.

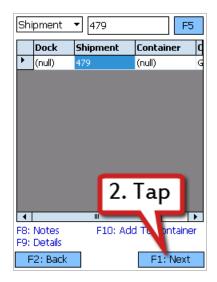3. If the Shipments do not automatically load, tap or press **F5**.

If the Shipment has not been Processed, you will be prompted to Process the Shipment before you can Receive it. If the Order Class for the Shipment has been set to disallow Processing from the Mobile Device, the search will return no results.

Step 3. Receive
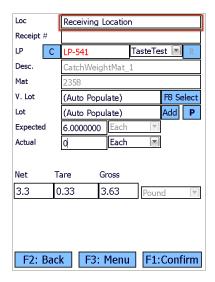
1. Select the item you'd like to complete from the list.
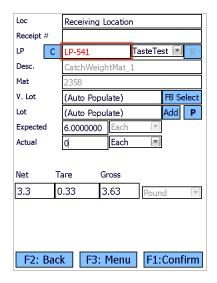

2. Tap **Next** or press **F1**.

3. There will be a list of all Materials expected in the Shipment. The list can be filtered by entering a Material's Name or Description in the **Item** field, and pressing or tapping **F5**. Select the Material you will be Receiving.
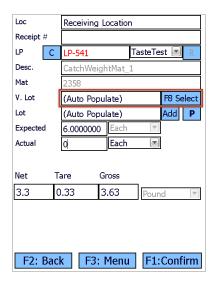
4. Tap **Next** or press **F1**.

5. Confirm the **Location**.

6. Scan or enter the **License Plate** the Received Materials will be assigned to. You can enter an existing License Plate, or create a new one.
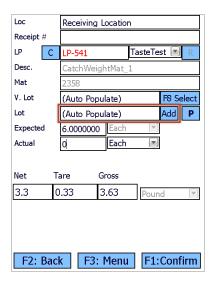

7. If your Material is Lot controlled, scan or enter the **Vendor Lot** number, or tap **Select** or press **F8** to choose from a list of existing Vendor Lots.

Create a new Lot if necessary

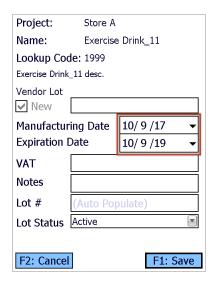1. Tap **Add** to create a new Lot and Vendor Lot.

2. Ensure that the **New** box is selected.

3. You can enter a new **Vendor Lot ID**, or leave it blank to let the system create one.
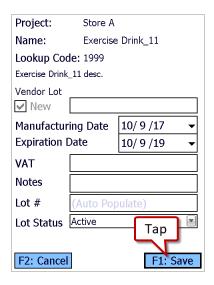

4. Enter the **Manufacturing** and **Expiration Dates**.

5. You can enter a new **Lot ID**, or leave it blank to let the system create one.

6. Tap **Save** or press **F1**.

9. Enter the **Actual** amount Received, and make sure you've selected the appropriate **Packaging** from the drop-down list. Alternatively, if the Material has been set up for Dynamic Packaging, you will see a field labeled **Dynamic**, where you will also enter the number of items per package.

10. Tap **Confirm** or press **F1**.

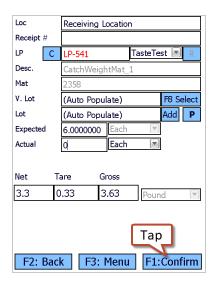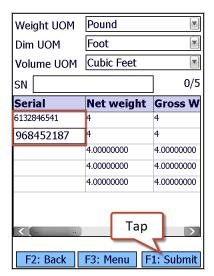11. If your Material is Serial Controlled, you will also need to create Serial Numbers for the Shipment. A screen will open for you to do so. Enter them, then tap **Submit** or press **F1**.

You will then be taken back to the Receive Tasks screen, where any remaining Quantities will be listed. Continue Receiving until all Tasks are complete.
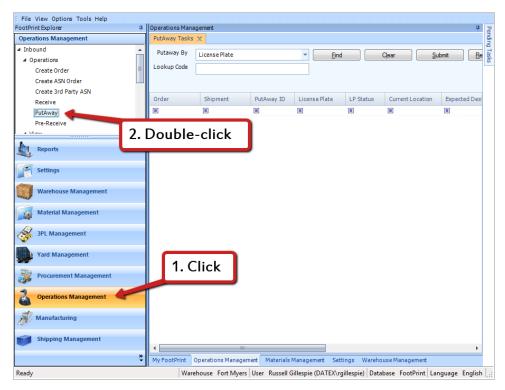
Putaway Inventory

The Putaway process moves new Inventory from the Receiving Location to its storage Location inside your Warehouse.

✅ Prerequisites

- Inbound Order
- Received Inventory
- Warehouse
- Locations

Step 1. Open the Putaway section

1. Click the **Operations Management** module in the FootPrint Explorer.

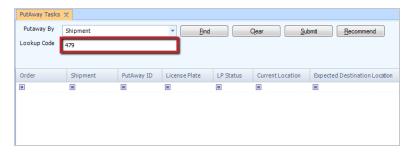2. Double-click the **Putaway** section under the **Inbound** and **Operations** headings.

Step 2. Search by License Plate LookUp or Shipment Number

1. Choose whether you will be finding Putaway Tasks by **Shipment** or **License Plate**.

2. Enter the **LookUp Code** of the License Plate or the Shipment Number.
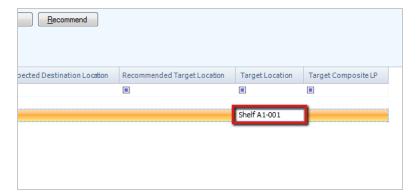

3. Click the **Find** button.

All the available Tasks for the Shipment or License Plate you looked up will be displayed in the List pane.
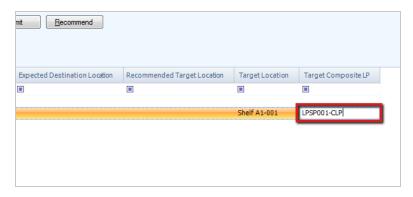
Step 3. Putaway

1. Select the Tasks you'd like to Putaway, and enter the **Target Location** where you'll be storing the Materials.
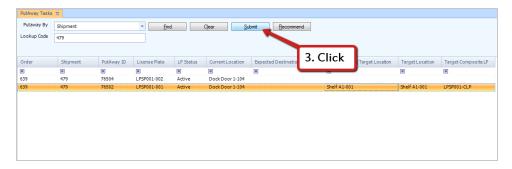
💡 Tip

You can click the **Recommend** button, and the system will suggest a Putaway Location based on all information it has about the Material and your Warehouse (Temperature Category Rules, Location Mixing Restrictions, size of the Materials and available space, etc.). It may also consult any custom Workflows you have in place.

2. (Optional) If you are going to be collecting multiple License Plates into a Composite License Plate, enter the LookUp Code of the **Composite License Plate**.

Continue filling out information for each Task you'd like to complete, or move directly to submitting what you've done.

3. Click the **Submit** button to submit all completed Tasks.

Putaway Inventory

A pop-up window will confirm all completed Tasks. Any remaining Tasks will be left in the Tasks List. Repeat the process until you've completed all Putaway tasks.
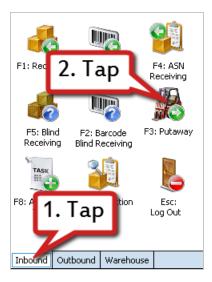
Putaway Inventory

Putaway moves the new Inventory from the Receiving Location to its storage Location inside your Warehouse.

✅ Prerequisites

- Inbound Order
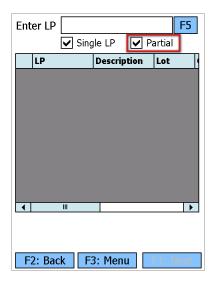- Received Inventory
- Warehouse
- Locations

Step 1. Open the Putaway section

1. Tap the **Inbound** tab.

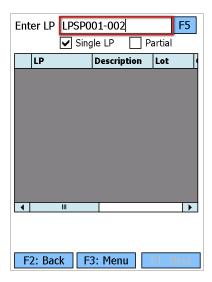2. Tap the **Putaway** section, or press **F3**.
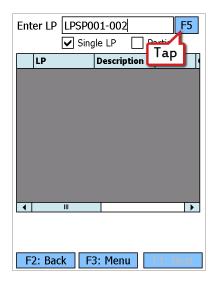

Step 2. Scan or enter the License Plate LookUp

(Optional) If you need to put away materials in multiple locations, check the **Partial** check box. (See Partial Putaway)

1. Scan or enter the **License Plate** LookUp that you will be moving to its new Location.

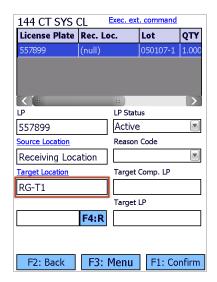2. If the list does not automatically load, tap or press **F5**.

You will be taken to the Putaway screen with the License Plate listed.

Step 3. Putaway

1. (Optional) If you are going to be collecting multiple License Plates into a Composite License Plate, scan or enter the **Target Composite License Plate** LookUp (see Composite License Plates).
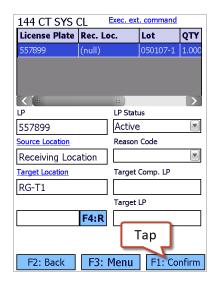

2. Scan or enter the **Target Location**.

💡 Tip

You can also tap the **F4:R** button, or press **F4**, and the system will suggest a Putaway Location based on all information it has about the Material and your Warehouse (Temperature Category Rules, Location Mixing Restrictions, size of the Materials and available space, etc.). It may also consult any custom Workflows you have in place.

3. Tap **Confirm** or press **F1**.

Repeat this process for each remaining License Plate until you've completed all Putaway tasks.
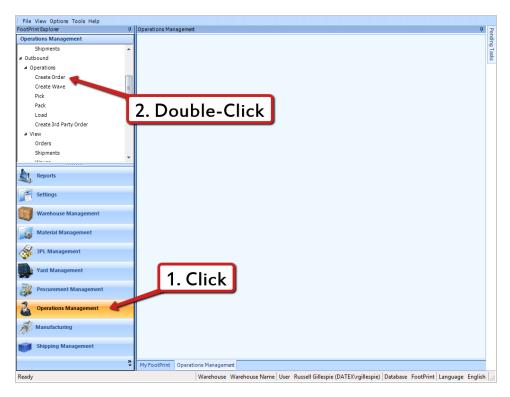
Create an Outbound Order

Outbound Orders contain information about what you're shipping, where it's coming from, where you're sending it, and how it's getting there.

> ✅ **Prerequisites**
>
> - **Owner**
> - **Project**
> - **Warehouse**
> - **Carrier**
> - **Materials**
> - Inventory in your Warehouse

Step 1. Create a new Outbound Order

1. In the FootPrint Explorer, click the **Operations Management** module.

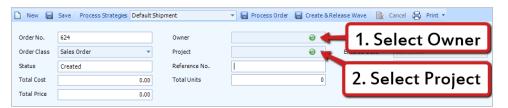2. Underneath the **Outbound** and **Operations** headings, double-click the **Create Order** section.

A new Outbound Order will automatically be created for you.

Step 2. Enter Basic Information

The top part of the screen is where you'll find general information about your Order. Much of this is handled by the system, which creates an Order number for you that you can change if you'd like.

1. Select the **Owner** of the Materials you will be Shipping.

2. Select the **Project** that the Shipping Materials belong to.

3. (Optional) You can select the **Expected Date** for the Order if you'd like, and enter a **Reference Number** to associate with the Order, but neither have effects on the system, and are just for reference purposes.

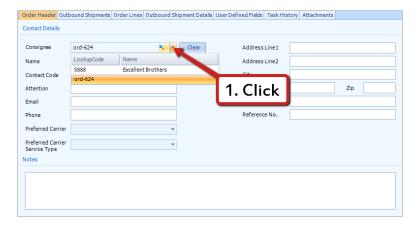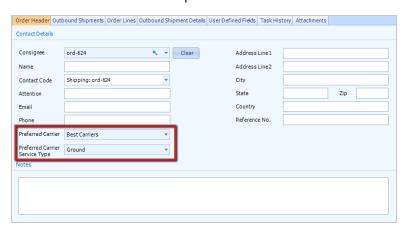## Step 3. Fill out the Order Header

The first tab you will see is the **Order Header** tab, which contains information about who will be receiving this Shipment.

1. If you have an Account set up for who you'll be shipping to, click the drop-down arrow and select them from the list. You can also click the **magnifying glass icon** to open a pop-up window where you can search for the Account, or even create a new one.
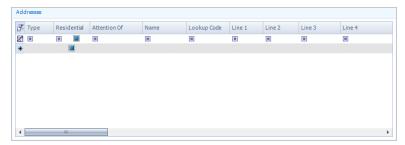
If you do not have any Accounts set up, or you are sending it somewhere that doesn't have an Account associated with it, you can manually fill in the Contact information here.

2. (Optional) If you'll be setting up multiple Shipments for the Order, you may want to set a **Preferred Carrier** and **Service Type** for the Consignee, so that you won't have to select them with each new Shipment.

3. (Optional) If you want to add multiple order-specific addresses, you can enter them in the Addresses grid and they will be linked with this Order even if the Consignee Address changes.
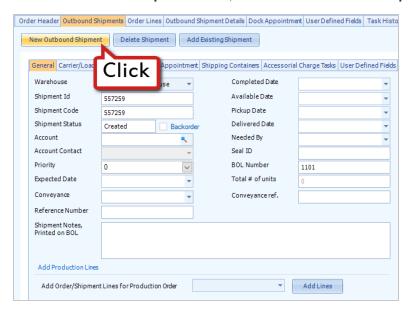

Step 4. Set up Outbound Shipments

The **Outbound Shipments** tab allows you to create multiple Shipments for the Order, and as a result of this, there is a lot of variable information you can enter here. A set of

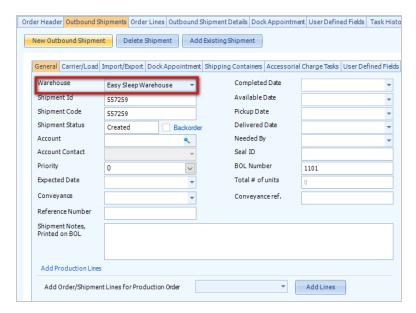tabs specifically for Outbound Shipments becomes available when you select the **Outbound Shipments** tab.

Step 4.1. Create a new Outbound Shipment

1. Underneath the **Outbound Shipments** tab, click **New Outbound Shipment**.
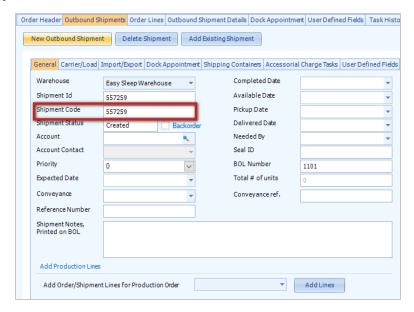

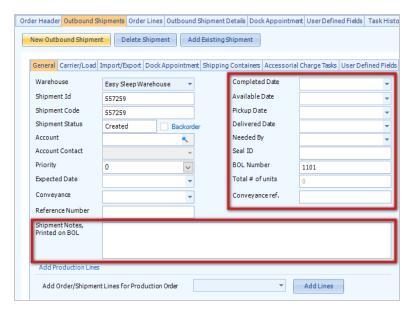## Step 4.2. Fill out the General Information

1. Confirm you have selected the **Warehouse** from which you'll be shipping the Materials.

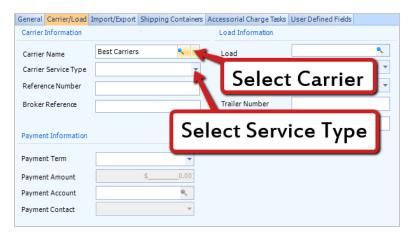2. The system will automatically create a **Shipment Code** for you, which you can change if you'd like.

3. (Optional) Fill in any additional information you'd like for the Shipment, including relevant dates, **Seal IDs**, a specific **Bill of Lading Number**, or any **Notes** you may want to include.
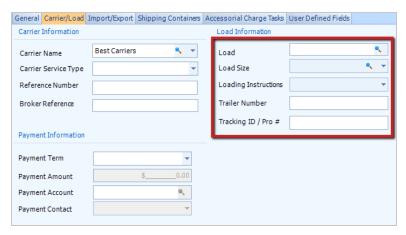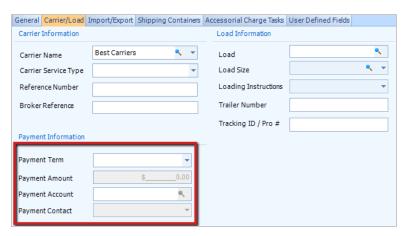

Step 4.3. Enter the Carrier Information

1. On the **Carrier/Load** tab, select the **Carrier** and **Carrier Service Type** (Ground, Air, Next Day, whatever you have set up for your Carrier) from the drop-down lists.

2. (Optional) If you have any relevant **Load Information**, and have already set up Load Containers in the Load Container Management section, you can enter it or select it from drop-down lists here.
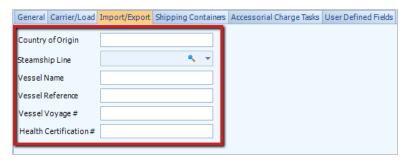

3. (Optional) If you have specific information about how the Payment will take place (amount, terms, etc), you can select that here and it will appear on the Bill of Lading.

Step 4.4. (Optional) Enter International Shipping Information

1. If you are Shipping overseas, you may want to fill out any relevant information in the **Import/Export** tab.

You can repeat this process for as many individual Shipments as you'll be using in your Order, but as long as you have at least ONE Shipment for your Order, you will be able to proceed.

Step 5. Select Inventory to Ship

Under the **Order Lines** tab, we are able to specify just what it is that we'd like to ship out. There are two ways to go about this:
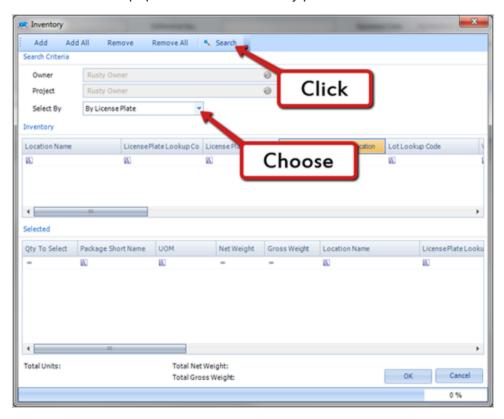
Add from the Inventory window

1. If you're sending multiple Shipments, you will need to associate inventory with each one. Select the appropriate Shipment LookUp Code from the **Shipments** drop-down list.
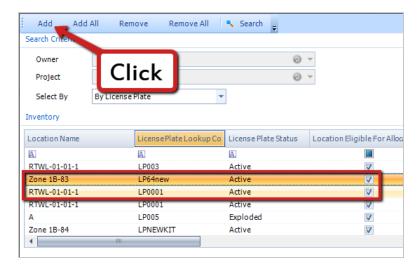

2. Click the **Select Inventory** button. The Inventory window will pop up.
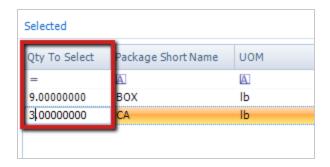
3. Choose whether you want to organize your Materials by **License Plate** or by **Lot**.

4. Click **Search**. A list of all the Materials belonging to the Owner and Project that the Order is for will be populated in the Inventory pane of the window.
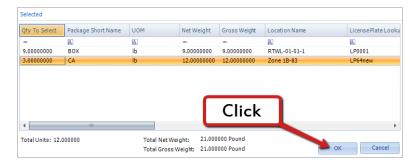

5. Select inventory. This can be done by highlighting one (or more by holding **Ctrl** or **Shift** and clicking) Material you'd like to include in the Shipment, and then clicking **Add**. Continue highlighting and clicking add until you've added all the Materials you want in this Shipment. Or you can add all of the available Materials by clicking **Add All**.

6. Set the quantities of the Materials you will be adding to the Shipment by selecting the **Qty To Select** field corresponding to each Material, then typing in the desired amount.
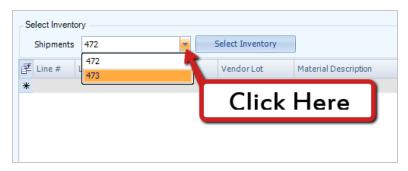

7. Once you've set your Quantities, click the **OK** button to add them to your Shipment.

You can continue using this method to add Materials to each Shipment you've set up in your Order.

Add from the Order Lines list area

1. If you're sending multiple Shipments, you will need to associate inventory with each one. Select the appropriate Shipment LookUp Code from the **Shipments** drop-down list.
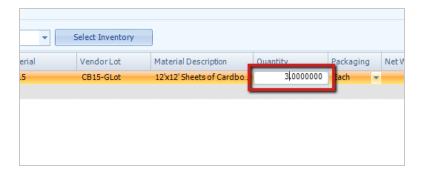

2. Click directly in the greyed out row of the list pane, and a new entry for a Material will be created automatically.

3. Click the drop-down arrow under the **Material** heading to open a list of Materials available for the Order's Owner and Project, and select the Material you'd like to add. In a similar fashion, you can specify the **Lot** or **Vendor Lot** you'd like to Pick from.

4. Specify the quantity of the Material you'd like to add to the Shipment by clicking the **Quantity** field and entering the amount desired. Make sure you have the correct **Packaging** Type selected. If you'd prefer, you can instead enter a **Net** or **Gross Weight** to specify in the same way; just make sure to select the appropriate **Unit of Measurement**.
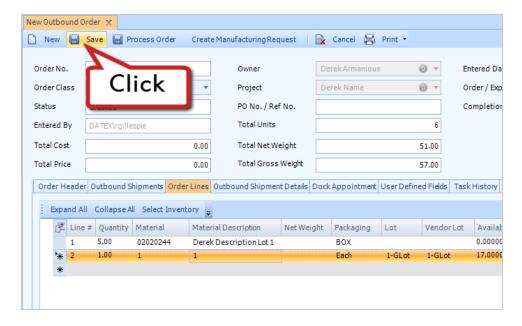
You can continue using this method to add Materials to each Shipment you've set up in your Order.

Step 6. Save and Process the Order

Finally, we are ready to Save and Process the Order we've just filled out. You can Save your progress at any time to keep the Order information in the system, but you will not be able to continue the Outbound procedure until you've Processed the Order, allowing for Wave creation.

1. Click **Save** to save the Order.

2. Click **Process Order**. The Order Processing Configuration pop-up window will open.

⚠ Note

If the Order Class has been set to disallow Processing from the Desktop, the Process button will be disabled here. Processing must take place either on the Mobile Device, or cannot take place conventionally through either the Desktop or the Mobile Device.
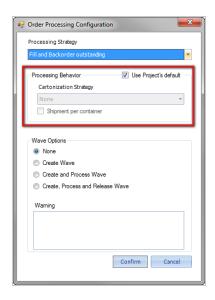

3. Select the **Processing Strategy** to use for the Order. If an Outbound Processing Strategy is set up for the Project associated with the Order, that will be chosen when using the **Default** Strategy. Otherwise, the options are:

- **Fill and Backorder Outstanding:** Order Lines will be broken down by available Inventory, such that any Quantity that is not currently available will be split into a second Order Line, and assigned to a Separate Shipment. The created Shipments that are for available Inventory will be Processed as normal, and the Shipments for unavailable Inventory will remain in a Created status, requiring manual Processing from the View Outbound Shipments screen.
- **Fill and Cancel Outstanding:** Order Lines will be broken down by available Inventory, such that any Quantity that is not currently available will be split into a second Order Line. Order Lines that cannot be fulfilled will be Canceled, while the Order Lines for available Inventory will be Processed as normal.
- **Fill and Manually Allocate Outstanding:** All Order Lines will be Processed as normal, but Manual Allocation Tasks will be created for the Quantities

that are not currently available, while normal Pick Tasks are created for available Inventory.

- **Fill or Stop Processing:** The system will only Process the full Order if **all** Inventory specified in each Order Line is currently available; otherwise, the Order will not allow Processing.
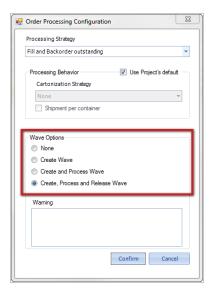

4. If you un-check the **Use Project's Default** box, you can manually choose which **Cartonization Strategy** to use for the Order. This can be done strictly **By Volume**, ensuring the most inventory can be packed into the smallest space and reducing the number of Shipping Containers, **By Volume with no Material Mixing**, similar to By Volume but preventing Materials of separate types from being packed together, or by Volume and Pick Tasks (**By Volume Min Fragmentation**), allowing the system to reduce the number of Shipping Containers as well as the number of Pick Tasks. Any custom Cartonization Workflows will be available here. You can also select **None** to not implement any Cartonization Strategy.

With a check mark in the **Shipment Per Container** box, the Order will be broken down into a unique Shipment for each Container needed.
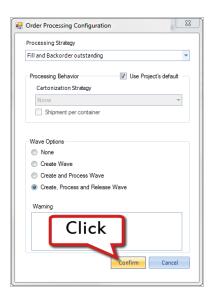
5. Select one of the following **Wave Options** for the Order:

- **None:** No Wave will be created for the Order.
- **Create Wave:** A Wave will be Created for the Order, but must be manually Processed and Released.
- **Create and Process Wave:** A Wave will be Created and Processed for the Order, but must be manually Released.
- **Create, Process and Release Wave:** A Wave will be Created, Processed, and Released for the Order, allowing for immediate Picking.

6. Click **Confirm** to Process the Order using the chosen settings.

Create a Wave
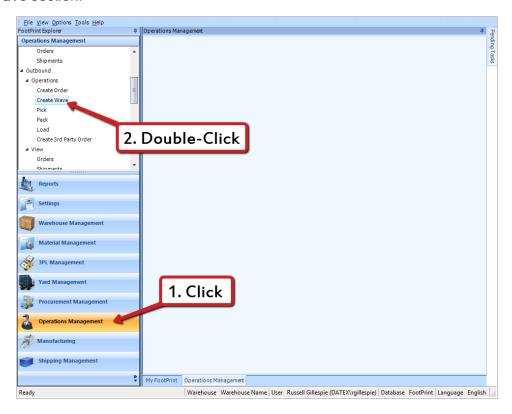
Waves allocate the inventory for one or multiple Shipments, assigning the Pick Location, and then enable Picking when Released.

✅ Prerequisites

- Outbound Order
- Inventory in your Warehouse

Step 1. Open the Wave Creation section
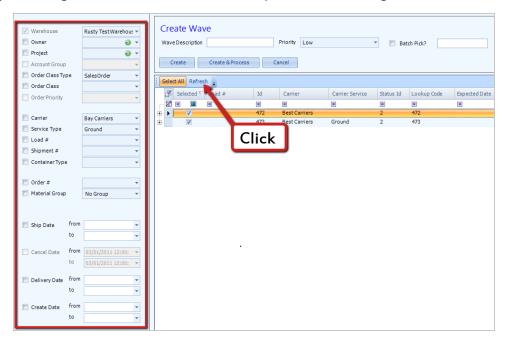
1. In the FootPrint Explorer, click the **Operations Management** module.

2. Underneath the **Outbound** and **Operations** headings, double-click the **Create Wave** section.
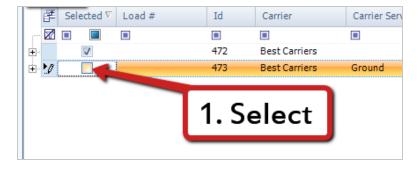

Step 2. Search for Shipments

In the **Wave Creation** section, a list of all Processed and available Shipments will populate in the list pane. If you want to view a smaller, more specific set of

Shipments, you can filter your results by adjusting the values in the left-hand pane (by selecting **Owners**, **Carriers**, dates, etc.), and then clicking **Refresh**.

Step 3. Select Shipments and Create Wave

1. Select all the Shipments you will be including in your Wave by placing a check mark under the **Selected** heading next to each Shipment. You can also select all the listed Shipments by clicking **Select All**.

2. Enter a name for your Wave in the **Wave Description** field. Optionally, you can select a **Priority** for the Wave, which will be viewable on Mobile Devices.

3. Click **Create** to create the Wave.
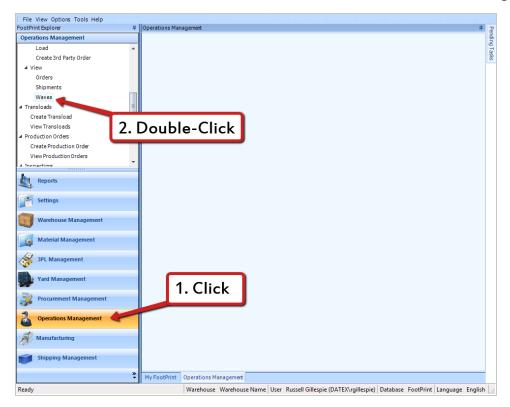
You also have the option to **Create & Process** the Wave instead of simply creating it. Doing so will automatically Process the Wave, Allocating the Materials and Releasing the Wave to be Picked from. This, however, will not allow you to Manually Allocate the Materials, and does not give you time to plan workloads before locking the Materials in place to be Picked (you can still go back and Reallocate Manually from the View Waves section).

Once you've created the Wave, you will notice the **Pending Tasks** tab on the upper right-hand corner of the screen flash. Viewing the Pending Tasks will allow you to confirm that the Wave has successfully been created, and that you can continue on to the next step.

Step 4. Open Wave List section
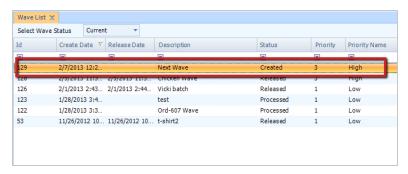
1. Make sure you're still in the **Operations Management** module.

2. Double-click the **Waves** section underneath the **Outbound** and **View** headings.
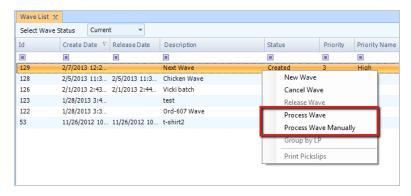
Step 5. Process Wave and Allocate

A list of all the current Waves will populate in the top half of the window.

    1. Select your newly created Wave.

    2. Right-click the row. You now have two options: **Process Wave**, and **Process Wave Manually**. By clicking **Process Wave**, the system will automatically Allocate the Materials for Shipment based on the Global Allocation Sequence it has created. Alternatively, **Manually Allocating** will allow you to choose precisely where you'd like to Pick the Materials from.

By selecting to Process the Wave automatically, you can move directly to Releasing the Wave.
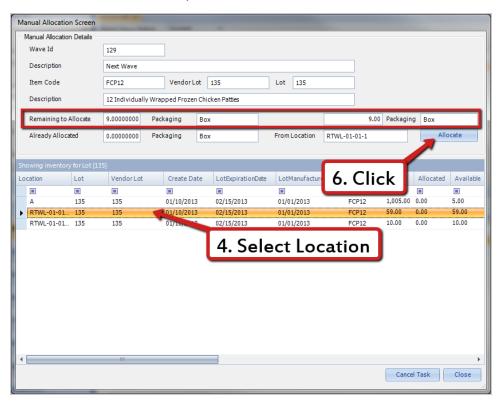
    3. Under the **Manual Allocations** tab, the Order Lines you created in the Outbound Order will be listed. Double-click one of the rows to open the Manual Allocation Screen.

4. Select the **Location** from which you'd like to Allocate.

5. Ensure that the amount you are Allocating (on the right) is equal to the amount remaining to Allocate (left).

6. Click **Allocate**.

You can continue Allocating in this manner, filling in the amount you'd like to Allocate from each Location, and then clicking Allocate. The window will remain open until the entire amount required is Allocated.
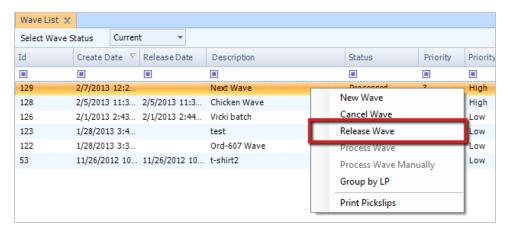
Repeat the Manual Allocation process for each Material until they have all been accounted for.

Step 6. Release the Wave

Once you have finished Allocating, you can release the Wave to the floor, so that Picking can begin.
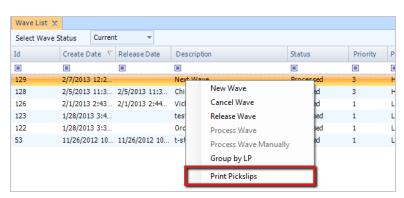
Right-click the Wave again, and this time select **Release Wave**.
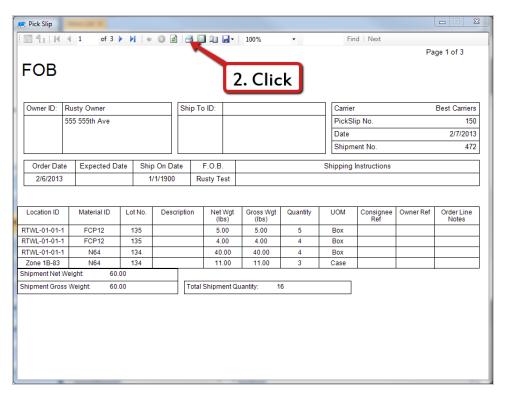
Step 7. (Optional) Print Pick Slips

You may want to print paper Pick Slips to go along with your Wave.

1. Right-click the Wave, and select **Print PickSlips** from the bottom of the drop-down list.

2. A new window will pop up, containing your Pick Slips. Click the **Printer** icon at the top of the window to print the slips.

Pick a Shipment
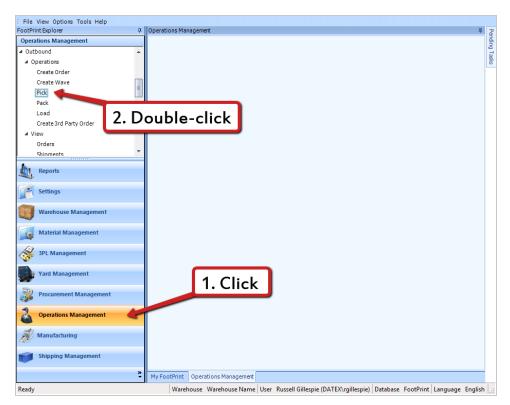
Picking confirms Materials are present in the Quantity requested for a Shipment, and relocates those Materials to their new Shipping License Plate.

> ## ✅ Prerequisites
>
> - **Outbound Order**
> - **Released Wave**
> - Inventory in your Warehouse

Step 1. Open the Pick section

1. In the FootPrint Explorer, click the **Operations Management** module.

2. Underneath the **Outbound** and **Operations** headings, double-click the **Pick** section.

Step 2. Search for Pick Tasks
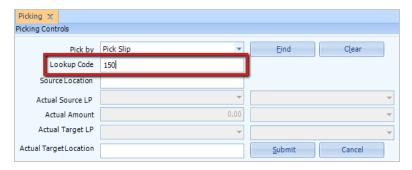
You are given several options on how to Pick.

1. Click the drop-down arrow for the **Pick by** field, and select how you'd like to find your Pick tasks:

- **Pick Slip**
- **Wave**
- **Shipment**
- **Load Container**
- **Location**

2. In the **LookUp Code** field, enter the corresponding code or ID to whichever Pick by option you chose.
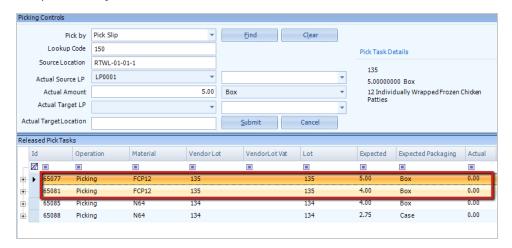
3. Click **Find**.
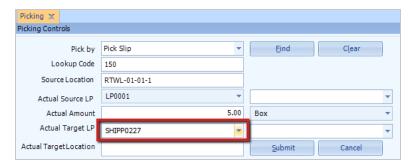
A list of all the Pick Tasks associated with the Shipment, Pick Slip, Location, etc. will populate in the **Released Pick Tasks** pane.

Step 3. Select Tasks and Pick
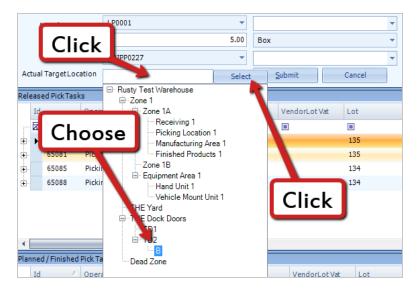
1. Select the Tasks you would like to complete (the Materials you wish to Pick, and relocate). You may have to submit Tasks one at a time.

2. Enter the ID of the Shipping License Plate in the **Actual Target LP** field. This can be an existing License Plate, or entirely new.

3. Click the **Actual Target Location** field. From the drop-down list of Locations, select where the Materials will be moved before Shipment (click **Select** to confirm).

4. Click **Submit**.
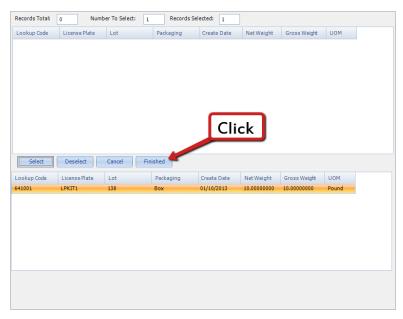
Step 3.1. Select Serial Numbers if necessary

If the Material you are Shipping has Serial Numbers associated with it (using LotSerial or MaterialLotSerial control types), you will have to specify which Serial Numbers you will be Shipping. A pop-up window will appear when you click Submit, prompting you to do so.

1. Select the Serial Number(s) you would like to send.

2. Click **Select**.

3. Click **Finished** to confirm your chosen Serial Numbers as those you will be Shipping.

Repeat this process for all Pick Tasks for the Order.

Pick Inventory
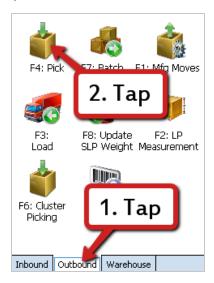
Picking takes Materials from their storage Location and assigns them to a new License Plate for shipment.

✅ Prerequisites

- **Outbound Order**
- **Released Wave**
- Inventory in your Warehouse

Step 1. Open the Pick section

1. Tap the **Outbound** tab.
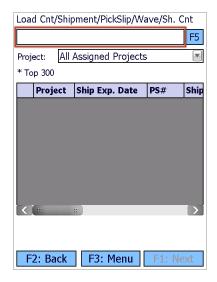
2. Tap the **Pick** section, or press **F4**.

Step 2. Search for Shipment or scan Pick Slip

1. Enter or scan the **Load Container, Shipment, Pick Slip, Wave, or Shipping Container** you'd like to Pick for.

You may also select a Project from the **Project** drop-down list to filter all results by the chosen Project.

2. Press **F5** or tap **Search**.

3. Select the Shipment or Pick Slip you want to find the tasks for, and tap **Next** or press **F1**.

Step 3. Select a Task

On this screen, you will see a list of available Pick Tasks.

    1. You can select one of the Pick Tasks, or scan either the **Location** you are Picking from, or the **License Plate**, **Material**, **Serial**, or **Shipping Container**.

    2. Tap **Next** or press **F1**.

Step 4. Scan License Plates and Pick

♀ Tip

If the Location assigned for the Pick no longer contains the Material for the Pick Task, you can press the **F8** key to perform a Reallocation. See

the **Mobile Reallocation** tutorial for more information.

> ### ⚠ Note
>
> If the Order being Picked allows Reverse Pick, and the License Plate being Picked has more items on it to be Picked than the number that should remain in storage, a Reverse Pick will occur here. See the **Reverse Pick tutorial** for more information.

1. Scan or enter the **Source License Plate**. You can also tap or press **F7** to have the system display all applicable License Plates in the Location.

2. Enter the **Quantity** you will be Picking. Make sure the **Packaging** matches the expected Packaging.

3. Scan or enter the **Target License Plate**. You can create a new License Plate here, or select an existing one.
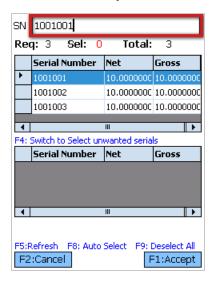
4. Tap **Next** or press **F1**.
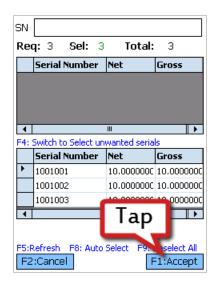
Step 4.1. Scan or Select Serial Numbers if necessary

If your Material has individual Serial Numbers assigned to it, you will need to scan or enter them at this point.

1. You can either scan each individual **Serial Number**, or you can tap or press **F8** to automatically select Serial Numbers for you.

2. After entering all Serial Numbers, tap the **Accept** button or press **F1**.

Repeat this process for every Task that remains.

Perform a Pick Drop
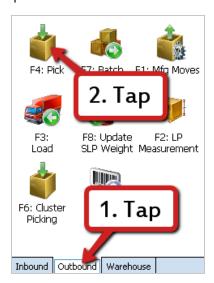
Materials Picked with the Mobile Device, and with their License Plates, are located with the Mobile Device itself. In order to transfer them to a Dock Location, you can perform a Pick Drop.

✅ Prerequisites

- Outbound Order
- Released Wave
- Inventory in your Warehouse
- Mobile Device Picked Inventory

Step 1. Open the Pick section

1. Tap the **Outbound** tab.
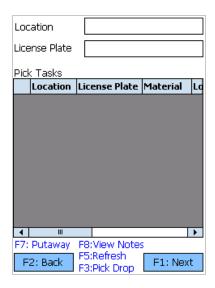
2. Tap the **Pick** section, or press **F4**.
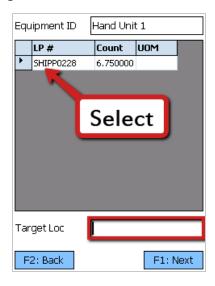
Step 2. Complete a Pick Drop
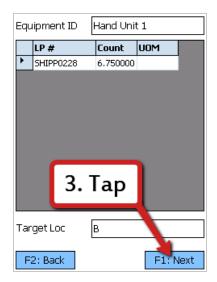
1. From the Pick screen, press **F3**.

2. Select the License Plate you want to Drop, and enter the **Target Location** where you will be dropping it off.

3. Tap **Next** or press **F1** to complete the Pick Drop.

You can repeat this for as many License Plates as you would like to Drop off from the Mobile device.

Load a Shipment
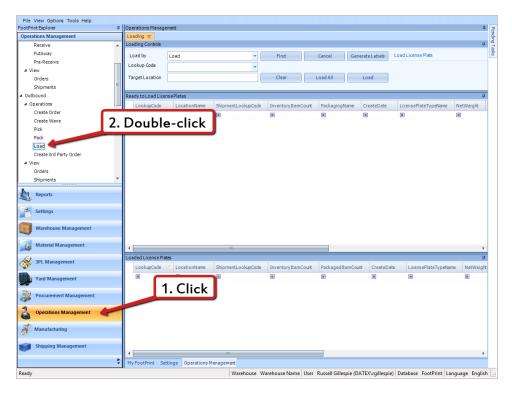
Loading represents actually loading the inventory onto the truck, on its way out of your Warehouse.

> ## ✔ Prerequisites
>
> - **Outbound Order**
> - **Picked Materials**
> - **Dock Location**

Step 1. Open the Load section

1. In the FootPrint Explorer, click the **Operations Management** module.

2. Underneath the **Outbound** and **Operations** headings, double-click the **Load** section.

Step 2. Find your Shipment/Carrier/Load

1. Select how to find your Load tasks by clicking the drop-down arrow, and selecting **Shipment**, **Carrier**, or **Load** for Load Container.

2. Enter the **LookUp Code** for your Shipment, Carrier, or Load Container to associate with your Order.

3. Click **Find**.

All relevant Load Tasks will be populated in the "Ready to Load License Plates" pane.

Step 3. Load

1. Click the **Target Location** field, and select from the list the Dock Location you will be Loading to.

2. Click **Select** to confirm.

3. Select the License Plate you want to Load from the list.

4. Click **Load** to confirm the Load. Your License Plate will move from the top pane to the "Loaded License Plates" pane on the bottom of the window.

Repeat for all License Plates you'd like to Load. Alternatively, click **Load All** to Load all the Ready to Load License Plates.

Load a Shipment
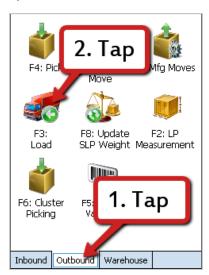
Loading is the last step in the Outbound process, and represents actually loading the inventory onto the truck, sending it on its way out of your Warehouse.

> ✅ **Prerequisites**
>
> - **Outbound Order**
> - **Picked Materials**
> - **Dock Location**

Step 1. Open the Load section

1. Tap the **Outbound** tab.

2. Tap the **Load** section, or press **F3**.

Step 2. Find your Shipment/Load/License Plate

1. Scan or enter the **LookUp Code** for the License Plate, Shipment, or Load Container.

2. Tap or press **F5**.

A list of all associated Tasks will populate.

Step 3. Scan or enter License Plate and Load Location

1. Scan or enter the **License Plate** you are Loading.

2. Scan or enter the **Dock Location** you are Loading into, or tap the R button to recommend a Location.
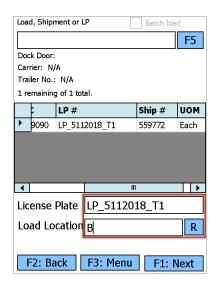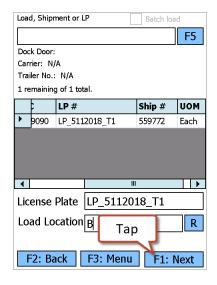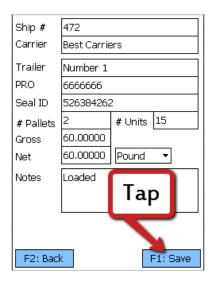
3. Tap **Next** or press **F1**.

Continue Loading until all Loading Tasks are cleared.

Step 4. Confirm details and Save

Once you've Loaded all License Plates, you will be brought to a confirmation screen. Make sure the information is correct, add any additional details necessary, and then tap **Save** or press **F1**.

Ship #	472
Carrier	Best Carriers
Trailer	Number 1
PRO	6666666
Seal ID	526384262

# Pallets	2	# Units	15

Gross	60.00000	
Net	60.00000	Pound ▾
Notes	Loaded	

Tap

F2: Back	F1: Save

Create a Warehouse Transfer Order

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
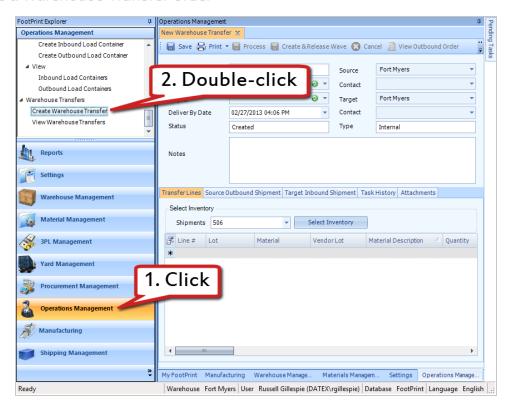
Creating a Warehouse Transfer also involves the creation of an Outbound Shipment and an Inbound Shipment. Both Shipments will share Order Lines, so the process is streamlined. Following the creation of the Warehouse Transfer Order, you must complete the standard Outbound process, then the Inbound process using ASN Receiving.

✅ Prerequisites

- Warehouses
- Locations
- Owner
- Project
- Carrier
- Materials
- Inventory in your Warehouse

Step 1. Create a new Warehouse Transfer

1. Click the **Operations Management** module in the FootPrint Explorer.

2. Double-click **Create Warehouse Transfer** under the **Warehouse Transfers** heading.

Step 2. Fill out the Basic Information
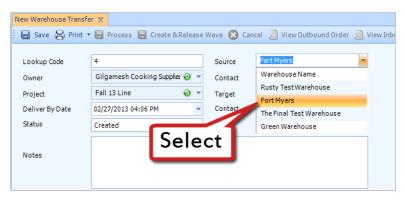
1. Select the **Owner** whose Materials you will be Transferring.
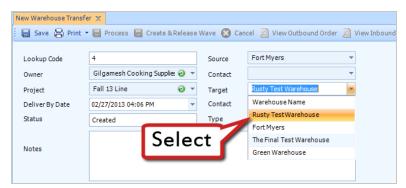
2. Select the **Project** under which the Materials are kept.

3. Select the **Source Warehouse** from which you will be Transferring Materials.

4. Select the **Target Warehouse**, to which you will be Transferring Materials.

Step 3. Select Inventory for the Transfer
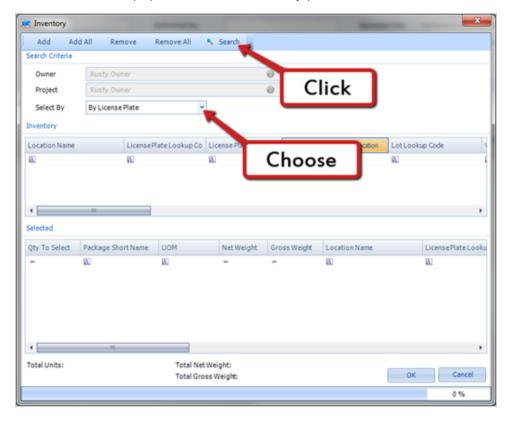
Under the Transfer Lines tab, you will select the Inventory for the Outbound Shipment, which will carry over to the Inbound Shipment. There are two ways to go about this:

Add from the Inventory window

1. Click the **Select Inventory** button. The Inventory window will pop up.

3. Choose whether you want to organize your **Materials** by **License Plate** or by **Lot**.

4. Click **Search**. A list of all the Materials belonging to the Owner and Project that the Order is for will be populated in the Inventory pane of the window.

5. Select inventory. This can be done by highlighting one (or more by holding **Ctrl** or **Shift** and clicking) Material you'd like to include in the Shipment, and then clicking **Add**. Continue highlighting and clicking add until you've added all the Materials you want in this Shipment. Or you can add all of the available Materials by clicking **Add All**.

6. Set the quantities of the Materials you will be adding to the Shipment by selecting the **Qty To Select** field corresponding to each Material, then typing in the desired amount.

7. Once you've set your Quantities, click the **OK** button to add them to your Shipment.

Add from the Order Lines list area
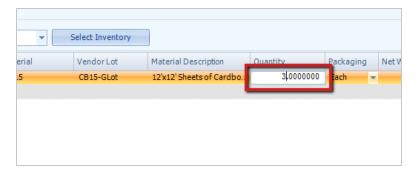
1. Click directly in the greyed out row of the list pane, and a new entry for a Material will be created automatically.

2. Click the drop-down arrow under the **Material** heading to open a list of Materials available to the Owner and Project you are creating an Order for, and select the Material you'd like to add. In a similar fashion, you can specify the **Lot** or **Vendor Lot** you'd like to Pick from.

3. Specify the quantity of the Material you'd like to add to the Shipment by clicking the **Quantity** field and entering the amount desired. Make sure you have the correct **Packaging** Type selected. If you'd prefer, you can instead enter a **Net** or **Gross Weight** to specify in the same way; just make sure to select the appropriate **Unit of Measurement**.
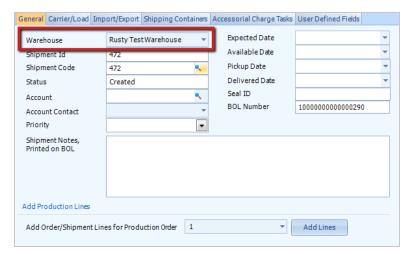
Step 4. Set up the Outbound Shipment
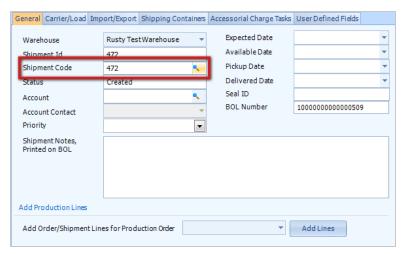
When creating a Warehouse Transfer, an Outbound Shipment will automatically be generated. The **Source Outbound Shipment** tab contains a set of tabs specifically for Outbound Shipment information as with an ordinary Outbound Order.

Step 4.1. Fill out the General Information
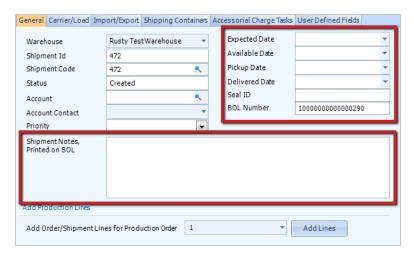
1. Select the **Warehouse** from which you'll be shipping the Materials.

2. The system will automatically create a **Shipment ID** for you, which you can change if you'd like.
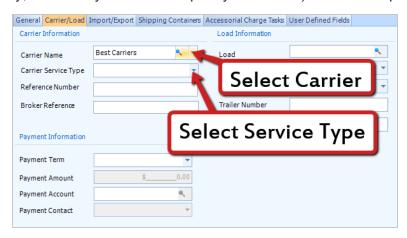
3. (Optional) Fill in any additional information you'd like for the Shipment, including relevant dates, **Seal IDs**, a specific **Bill of Lading Number**, or any **Notes** you may want to include.
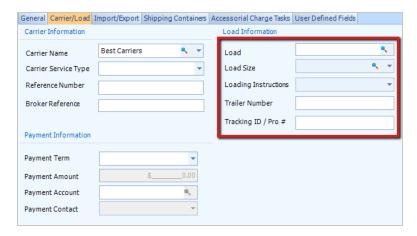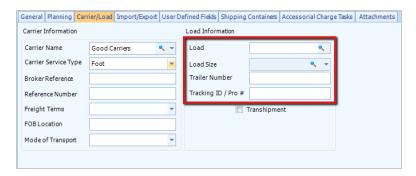
Step 4.2. Enter the Carrier Information
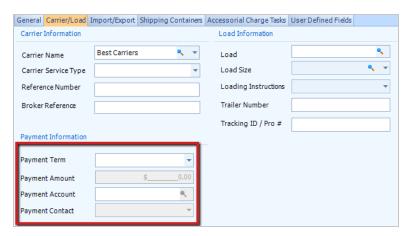
1. On the **Carrier/Load** tab, select the **Carrier** and **Carrier Service Type** (Ground, Air, Next Day, whatever you have set up for your Carrier) from the drop-down lists.
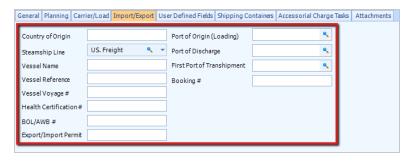

2. (Optional) If you have any relevant **Load Information**, and have already set up **Load Containers** in the Load Container Management section, you can enter it or select it from drop-down lists here.
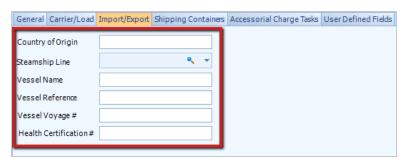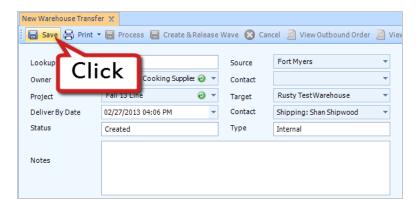
3. (Optional) If you have specific information about how the Payment will take place (amount, terms, etc), you can select that here and it will appear on the Bill of Lading.

Step 4.3. (Optional) Enter International Shipping Information

1. If you are Shipping overseas, you may want to fill out any relevant information in the **Import/Export** tab.
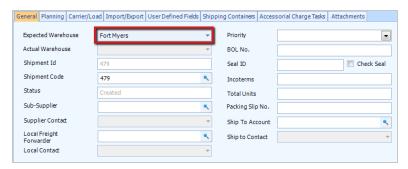
Step 5. Set up the Inbound Shipment
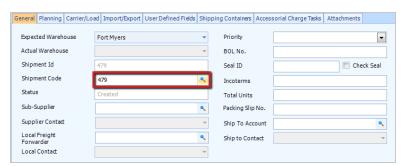
In addition to the Outbound Shipment, a new Inbound Shipment will be generated automatically for you. The **Target Inbound Shipment** tab contains a set of tabs specifically for Inbound Shipment information as with an ordinary Inbound Order.

Step 5.1 Fill out the General Information
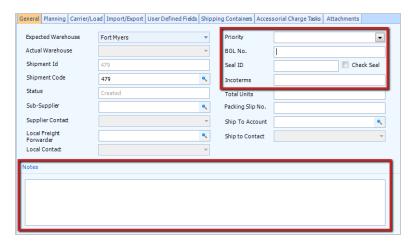
1. Select the **Warehouse** you're shipping the Materials to.

2. The system will automatically create a **Shipment ID** and a **Shipment Code** for you, but you can change the **Shipment Code** if you'd like.
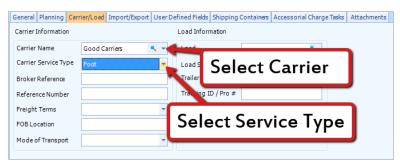
3. (Optional) Fill in any additional information you'd like for the Shipment, including **Priority**, **Seal IDs**, a specific **Bill of Lading Number**, or any **Notes** you may want to include.

Step 5.3. Enter the Carrier Information

1. On the **Carrier/Load** tab, select the **Carrier** and **Carrier Service Type** (Ground, Air, Next Day, whatever you have set up for your Carrier) from the drop-down lists.

2. (Optional) If you have any relevant **Load Information**, and have already set up **Load Containers** in the Load Container Management section, you can enter it or select it from drop-down lists here.

Step 5.4. **(Optional)** Enter International Shipping Information

If you are Shipping from overseas, you may want to fill out any relevant information in the **Import/Export** tab.

Step 6. Save the Warehouse Transfer

1. Click the **Save** button to Save the Warehouse Transfer.

Step 7. Process the Warehouse Transfer

You will now be able to Process the Transfer or Create and Release a Wave for it, in addition to viewing its associated Outbound and Inbound Orders.

1. You can click **Process** to ready the Transfer for execution. You will still need to manually create a Wave and Release it for Picking.

2. You could, instead of Processing, click **Create & Release Wave** to automatically Process the Transfer and create and Release a Wave for Picking. If you do so, you can skip the Create a Wave section below, and move straight to the Pick section.

Perform a Transload Order

Transload Orders, also known as Cross-docking, is the process of shipping things to your Warehouse, then putting them all straight onto another truck and shipping those things back out of your Warehouse, eliminating any need for storage. 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.

✅ Prerequisites
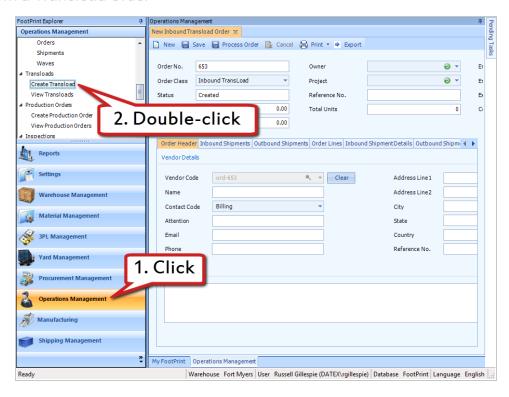
- Owner
- Project
- Warehouse
- Locations
- Carrier
- Materials

Create a new Transload Order

Step 1. Create a new Transload Order

1. Click the **Operations Management** module in the FootPrint Explorer.

2. Double-click **Create Transload** under the **Transloads** heading.
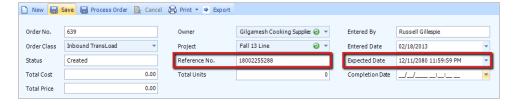
Step 2. Enter Basic Information

The top part of the screen is where you'll find general information about your Order. Much of this is handled by the system, which creates an Order number for you (that you can change if you'd like).

1. Select the **Owner** of the Materials you will be Shipping.

2. Select the **Project** that the Shipping Materials belong to.

3. (Optional) You can select the **Expected** and **Completion Dates** for the Order if you'd like, and enter a **Reference Number** to associate with the Order, but none have an effect on the system, and are just for reference purposes.

Step 3. Fill out the Order Header

The first tab you will see is the **Order Header** tab, which contains information about the Vendor from whom you are Ordering.

If you have an Account set up for the Vendor, click the drop-down arrow in the **Vendor Code** field and select them from the list. You can also click the **magnifying glass icon** 🔍 to open a pop-up window where you can search for the Account, or even create a new one.

If you do not have any Accounts set up, or you are sending it somewhere that doesn't have an Account associated with it, you can manually fill in the Contact information here.

Step 4. Set up the Inbound Shipments
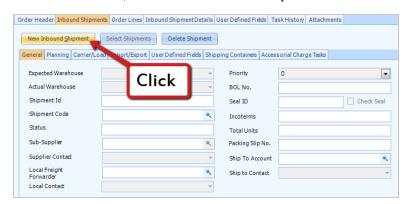
The **Inbound Shipments** tab allows you to create multiple Inbound Shipments for the Order, and, as a result of this, there is a lot of variable information you can enter here. A set of tabs specifically for Inbound Shipments becomes available when you select the **Inbound Shipments** tab, but don't worry - Shipments aren't too complicated.

Step 4.1. Create a new Inbound Shipment

Underneath the **General** tab, click **New Inbound Shipment**.
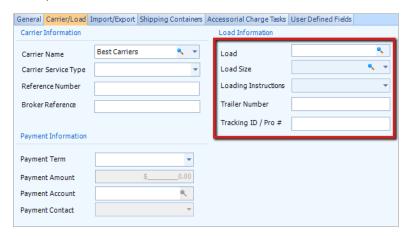

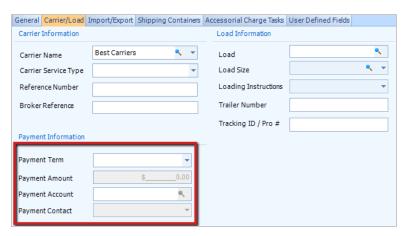## Step 4.3. Enter the Carrier Information

1. On the **Carrier/Load** tab, select the **Carrier** and **Carrier Service Type** (Ground, Air, Next Day, whatever you have set up for your **Carrier**) from the drop-down lists.

2. (Optional) If you have any relevant **Load Information**, and have already set up **Load Containers** in the Load Container Management section, you can enter it or select it from drop-down lists here.
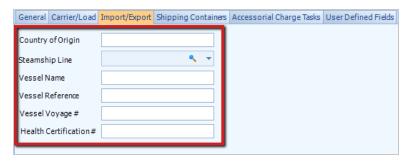

Step 4.4. (Optional) Enter International Shipping Information

If you are Shipping from overseas, you may want to fill out any relevant information under the **Import/Export** tab.
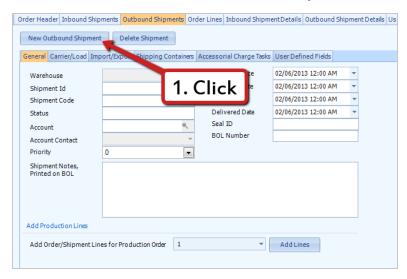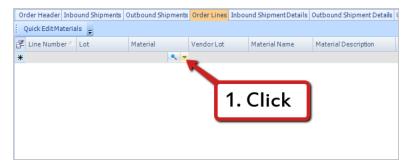

You can repeat this process for as many individual Inbound Shipments as you'll be using in your Order, but as long as you have at least ONE Inbound Shipment for your Order, you will be able to proceed.

Step 5. Set up Outbound Shipments

The **Outbound Shipments** tab functions the same way as the Inbound Shipments tab - you will be filling out the same information
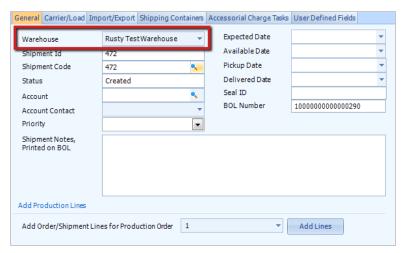
Step 5.1. Create a new Outbound Shipment

1. Underneath the **General** tab, click **New Outbound Shipment**.
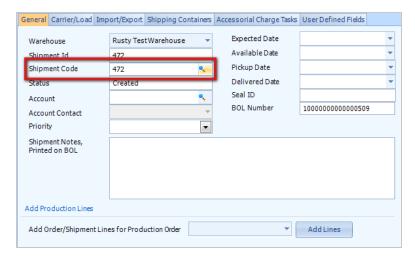
Step 5.2. Fill out the General Information
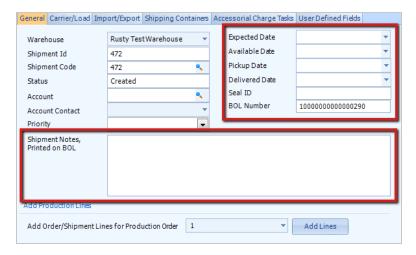
1. Confirm you have selected the correct **Warehouse** to which you're expecting to ship the Materials.

2. The system will automatically create a **Shipment ID** for you, which you can change if you'd like.

3. (Optional) Fill in any additional information you'd like for the Shipment, including relevant dates, **Seal IDs**, a specific **Bill of Lading Number**, or any **Notes** you may want to include.

Step 5.3. Enter the Carrier Information

1. On the **Carrier/Load** tab, select the **Carrier** and **Carrier Service Type** (Ground, Air, Next Day, whatever you have set up for your **Carrier**) from the drop-down lists.

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2. (Optional) If you have any relevant **Load Information**, and have already set up **Load Containers** in the Load Container Management section, you can enter it or select it from drop-down lists here.

3. (Optional) If you have specific information about how the Payment will take place (amount, terms, etc), you can select that here and it will appear on the Bill of Lading.

Step 5.4. (Optional) Enter International Shipping Information

1. If you are Shipping overseas, you may want to fill out any relevant information in the **Import/Export** tab.

You can repeat this process for as many individual Outbound Shipments as you'll be using in your Order, but as long as you have at least ONE Outbound Shipment for your Order, you will be able to proceed.

Step 6. Select Inventory to ship
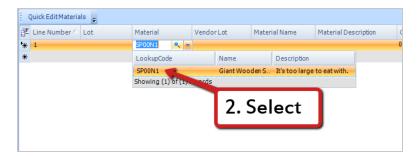
Under the **Order Lines** tab, we are able to specify just what it is that we'd like to have shipped to us. There are two options available to us at this point - you can select from existing Materials, or create a Generic Material in the event that the details about the Transload Materials are unimportant.

Use Existing Material(s)

1. Click directly in the greyed out row of the list pane, and a new entry for a Material will be created automatically.

2. Click the drop-down arrow under the **Material** heading to open a list of Materials available to the Owner and Project you are creating an Order for, and select the Material you'd like to add. In a similar fashion, you can specify the **Vendor Lot** you'd like to Receive.

3. Specify the quantity of the Material you'd like to add to the Shipment by clicking the **Quantity** field and entering the amount desired. Make sure you have the correct **Packaging** Type selected. If you'd prefer, you can instead enter a **Net** or **Gross Weight** to specify in the same way; just make sure to select the appropriate **Unit of Measurement**.

4. If you've created multiple Inbound Shipments, you will need to associate inventory with each one. Select the appropriate **Shipment** from the drop-down list.

Use Generic Material
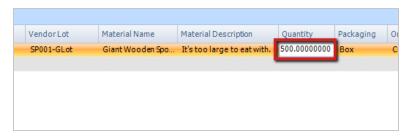
1. Click the unlabeled button between the Magnifying Glass icon and the Drop-Down icon.

2. A pop-up will open, allowing you to enter information for a Generic Material. You must enter at least the following:

- Material Description
- Shipping Weight
- Weight
- Weight Unit of Measurement
- Net Volume
- Gross Volume
- Volume Unit of Measurement
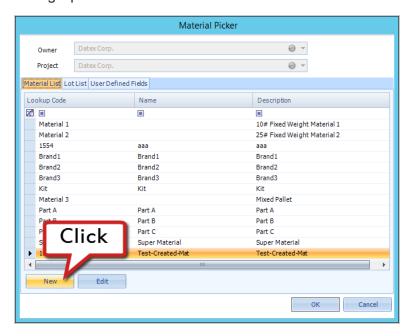
3. If there will be more than one of the items in the Shipment, update the Order Line's **Quantity**.

4. If you've created multiple Inbound Shipments, you will need to associate inventory with each one. Select the appropriate **Shipment** from the drop-down list.

For Serial Controlled Materials, you will need to create a new Material by clicking the Magnifying Glass icon, then clicking the **New** button. Then follow the steps outlined in Setting Up a Material.
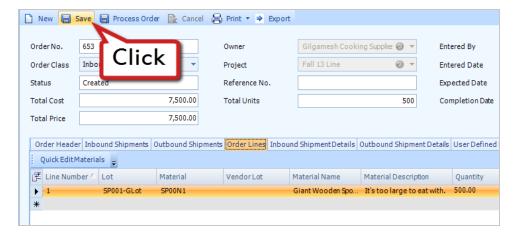
You can continue using this method to add Materials to each Inbound Shipment you've set up in your Order.
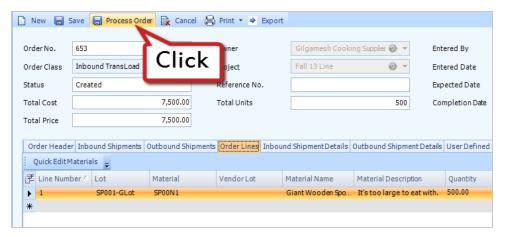
Step 7. Save and Process the Order

You can Save your progress at any time to keep the Order information in the system, but you will not be able to continue to Inbound procedure until you've Processed the Order, allowing you to begin Receiving.

1. Click **Save** to save the Order.

2. Click **Process Order** to save and confirm the Order, readying the system to begin its execution.
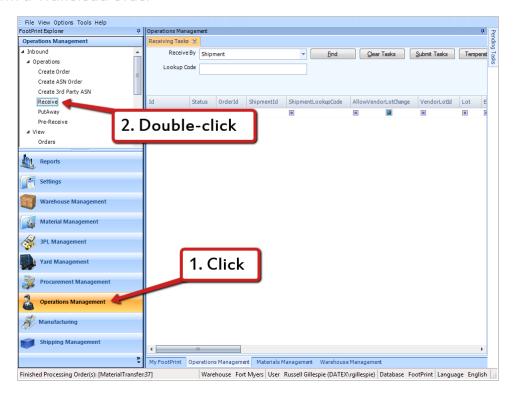
Receive

The Receiving process is nearly identical to any typical Receiving process, with one addition: you will need to associate the Received License Plates with the Outbound Shipment for the Transload Order.

Receiving from the Desktop

Step 1. Open the Receive section

1. Click the **Operations Management** module in the FootPrint Explorer.

2. Double-click the **Receive** section under the **Inbound** and **Operations** headings.

Step 2. Search for the Shipment or Order

You can search for your Shipment either by the Order or the Shipment Number.

1. Select how you'd like to search from the **Receive By** drop-down menu.

2. Enter the **LookUp Code** for the Shipment or Order.

3. Click the **Find** button.

Step 3. Receive

A list of the remaining Receive Tasks will populate. If you do not have a Default Receiving Location set, you will see a pop-up warning you about it. To learn more about Receiving Location, see the Setting Up a Warehouse tutorial.

1. If you do not have a Default Receiving Location set, enter the **Target Location** you'll be Receiving to by clicking the **magnifying glass icon** and selecting the Location.

2. Click **Select** to confirm the Location.
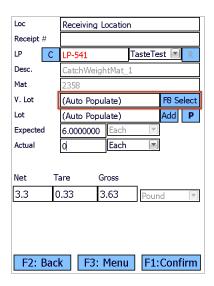
3. Enter the **License Plate** the Received Materials will be assigned to. You can enter an existing License Plate, or create a new one by typing in the LookUp Code here.
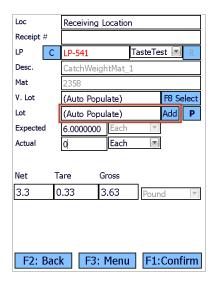

4. Enter the **Quantity** you are Receiving, or if the Material is measured by Weight, enter the **Weight** you are Receiving.

5. If your Material is Serial Controlled, you will also need to create Serial Numbers for the Shipment. A pop-up window will open for you to do so. Enter them, then click **Create Serial Numbers**.

6. If the Material you are Receiving is Lot Controlled, you will need to enter a **Lot**. Pick one from the drop-down menu, or click the **page icon** ⬜ to create a new Lot.

7. Select the **Outbound Shipment**.
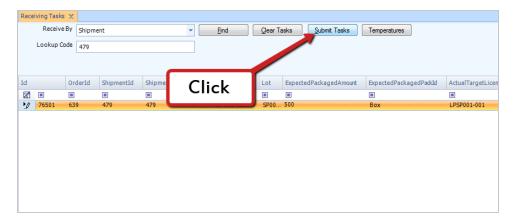
⚠ Note

This is crucial for the Transload process.

At this point, you can continue filling out information for each Task you'd like to complete, or you can move directly to submitting what you've done.

8. Click the **Submit Tasks** button.
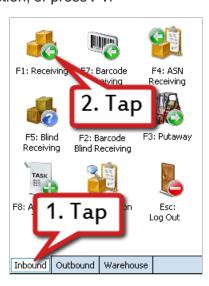
Once you've Submitted the Task, all remaining Tasks will be left in the window. Continue Receiving this way until you've Received all remaining Materials.

Receiving from the Mobile Device

Step 1. Open the Receive section

1. Tap the **Inbound** tab.

2. Tap the **Receiving** section, or press **F1**.

Step 2. Search for the Shipment, Order, or Door

1. From the drop-down list, select whether you'd like to search by **Shipment** Number, **Order** Number, or **Door** to Receive from.

2. Scan or enter the **LookUp Code** for your search.

3. If the Shipments do not automatically load, tap or press **F5**.

If the Shipment has not been Processed, you will be prompted to Process the Shipment before you can Receive it. If the Order Class for the Shipment has been set to disallow Processing from the Mobile Device, the search will return no results.

Step 3. Receive

1. Select the item you'd like to complete from the list.

2. Tap **Next** or press **F1**.

3. There will be a list of all Materials expected in the Shipment. The list can be filtered by entering a Material's Name or Description in the **Item** field, and pressing or tapping **F5**. Select the Material you will be Receiving.

4. Tap **Next** or press **F1**.

5. Confirm the **Location**.

6. Scan or enter the **License Plate** the Received Materials will be assigned to. You can enter an existing License Plate, or create a new one.

7. If your Material is Lot controlled, scan or enter the **Vendor Lot** number, or tap **Select** or press **F8** to choose from a list of existing Vendor Lots.

Create a new Lot if necessary

1. Tap **Add** to create a new Lot and Vendor Lot.

2. Ensure that the **New** box is selected.

3. You can enter a new **Vendor Lot ID**, or leave it blank to let the system create one.

4. Enter the **Manufacturing** and **Expiration Dates**.

5. You can enter a new **Lot ID**, or leave it blank to let the system create one.

6. Tap **Save** or press **F1**.

9. Enter the **Actual** amount Received, and make sure you've selected the appropriate **Packaging** from the drop-down list. Alternatively, if the Material has been set up for Dynamic Packaging, you will see a field labeled **Dynamic**, where you will also enter the number of items per package.

10. Select the Outbound Shipment.

⚠ Note
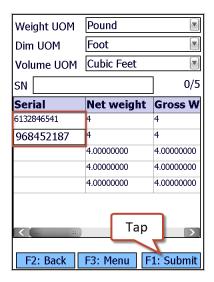
This is crucial for the Transload process.

11. Tap **Confirm** or press **F1**.

12. If your Material is Serial Controlled, you will also need to create Serial Numbers for the Shipment. A screen will open for you to do so. Enter them, then tap **Submit** or press **F1**.
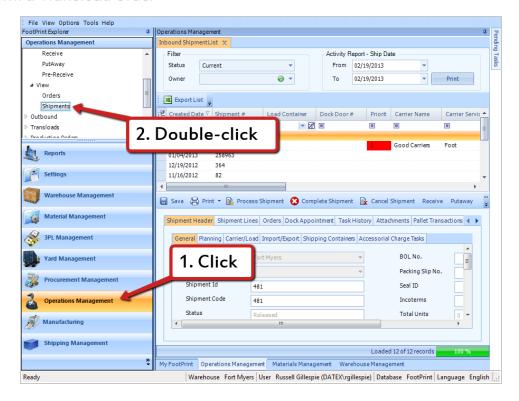
You will then be taken back to the Receive Tasks screen, where any remaining Tasks will be listed. Continue Receiving until all Tasks are complete.

Complete the Inbound Shipments

The next step in the Transload process is to Complete the Inbound Shipment, closing it and sending out Billing information. This will be necessary before you move on to the Outbound portion of the process.

Step 1. Open the Inbound Shipments section

1. Click the **Operations Management** module in the FootPrint Explorer.

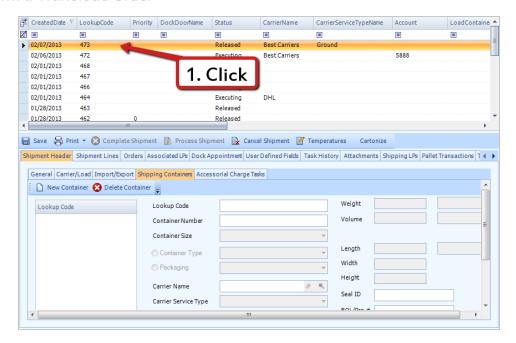2. Double-click the **Shipments** section under the **Inbound** and **View** headings.
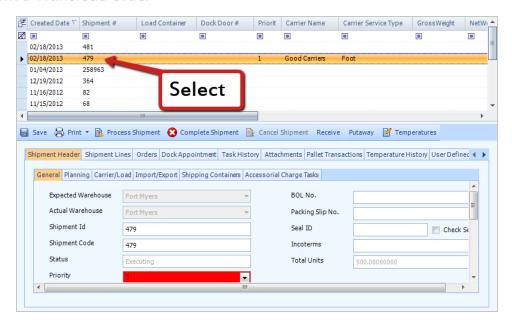
Step 2. Select your Shipment

Select the row with your Shipment information in it. The lower half of the screen will show all the Shipment details.

💡 Tip

You can filter the Shipments shown by selecting the **Owner** your Order is for in the upper left-hand corner of the screen.
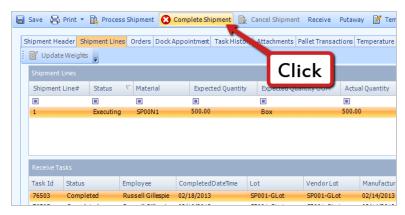
Step 3. Review information and Complete

Review all information and ensure that everything is correct.

⚠ Warning

You cannot fix any Receiving errors once the Complete Shipment button has been clicked.

Once you've reviewed the information and made sure everything in the Shipment is accounted for, you can click the **Complete Shipment** button. This will **permanently close out the Shipment**, and will send all the details of the Shipment to your Billing Records, from which you can create Invoices.
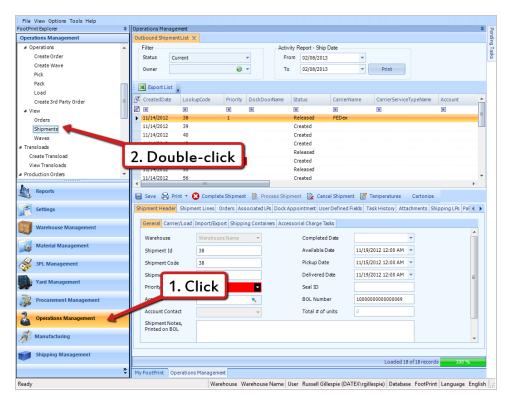
Do so for every Shipment in your Order.

Release License Plates

During Receiving for the Transload Order, your Materials are assigned to Composite License Plates, which are set up by the system. This groups the License Plates you will be Shipping together, to help streamline the Outbound Shipping process. But before you can begin Loading, you will need to release the Composite License Plate for shipping.

Step 1. Open the Outbound Shipments section

1. In the FootPrint Explorer, click the **Operations Management** module.

2. Underneath the **Outbound** and **View** headings, double-click the **Shipments** section.

Step 2. Select your Shipment

1. Select the row with your Shipment information in it. The lower half of the screen will show all the Shipment details.

💡 Tip

You can filter the Shipments shown by selecting the **Owner** your Order is for in the upper left-hand corner of the screen.

Step 3. Release Composite License Plate

Under the **Associate LPs** tab, right click the Composite License Plate and select **Ship Out Composite LP**.

A brief pop-up window will confirm the Task has been completed, and the License Plate is ready to Load.

Repeat this process for each Outbound Shipment you have set up.

Load
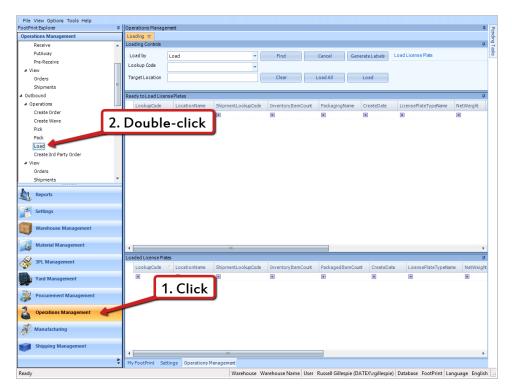
Loading for the Transload Order proceeds in an identical fashion to standard Loading.

Loading from the Desktop

Step 1. Open the Load section

1. In the FootPrint Explorer, click the **Operations Management** module.

2. Underneath the **Outbound** and **Operations** headings, double-click the **Load** section.

Step 2. Find your Shipment/Carrier/Load

1. Select how to find your Load tasks by clicking the drop-down arrow, and selecting **Shipment**, **Carrier**, or **Load** for Load Container.

2. Enter the **LookUp Code** for your Shipment, Carrier, or Load Container to associate with your Order.

3. Click **Find**.

All relevant Load Tasks will be populated in the "Ready to Load License Plates" pane.

Step 3. Load

1. Click the **Target Location** field, and select from the list the Dock Location you will be Loading to.

2. Click **Select** to confirm.

3. Select the License Plate you want to Load from the list.

4. Click **Load** to confirm the Load. Your License Plate will move from the top pane to the "Loaded License Plates" pane on the bottom of the window.

Repeat for all License Plates you'd like to Load. Alternatively, click **Load All** to Load all the Ready to Load License Plates.

Loading from the Mobile Device

Step 1. Open the Load section

1. Tap the **Outbound** tab.

2. Tap the **Load** section, or press **F3**.

Step 2. Find your Shipment/Load/License Plate

1. Scan or enter the **LookUp Code** for the License Plate, Shipment, or Load Container.

2. Tap or press **F5**.

A list of all associated Tasks will populate.

Step 3. Scan or enter License Plate and Load Location

1. Scan or enter the **License Plate** you are Loading.

2. Scan or enter the **Dock Location** you are Loading into, or tap the R button to recommend a Location.

3. Tap **Next** or press **F1**.

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Continue Loading until all Loading Tasks are cleared.

Step 4. Confirm details and Save

Once you've Loaded all License Plates, you will be brought to a confirmation screen. Make sure the information is correct, add any additional details necessary, and then tap **Save** or press **F1**.

Complete the Outbound Shipments

The final step in the Transload Order process is to Complete the Outbound Shipment. This is done as with an ordinary Outbound Shipment.

Step 1. Open the Outbound Shipments section

1. In the FootPrint Explorer, click the **Operations Management** module.

2. Underneath the **Outbound** and **View** headings, double-click the **Shipments** section.

Step 2. Select your Shipment

1. Select the row with your Shipment information in it. The lower half of the screen will show all the Shipment details.

💡 Tip
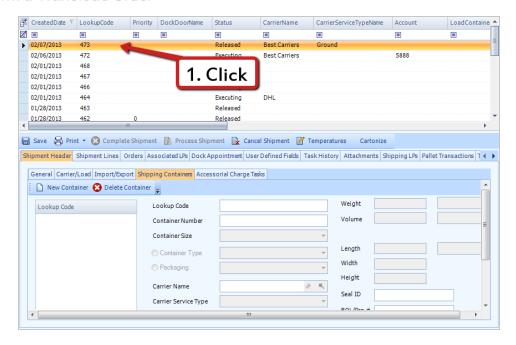
You can filter the Shipments shown by selecting the **Owner** your Order is for in the upper left-hand corner of the screen.
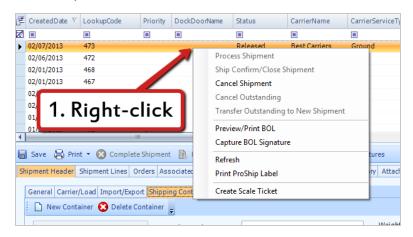
Step 3. (Optional) Bill of Lading

At this point, you are able to access your Shipment's Bill of Lading for signature capture and printing.
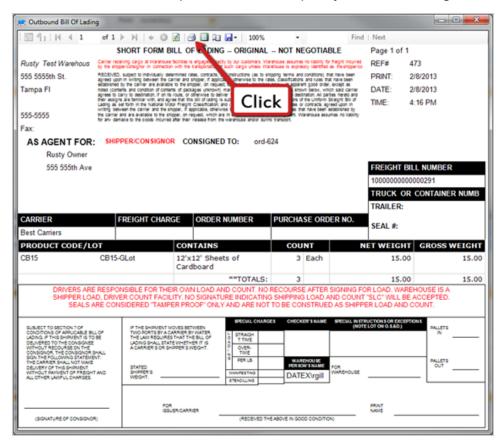
> ### ⚠ Note
>
> You may have to change the filter status from "Current" to "Completed" to see your Shipment.

1. Right-click the Shipment.

2. Clicking **Preview/Print BOL** will open a pop-up window with the Bill of Lading. Click the **Printer icon** at the top of the window to print your Bill of Lading.
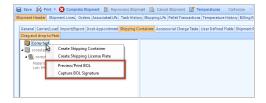
3. By clicking **Capture BOL Signature** after right-clicking the Shipment, you are able to use a Signature Capture Device to input the driver's digital signature directly into the system.
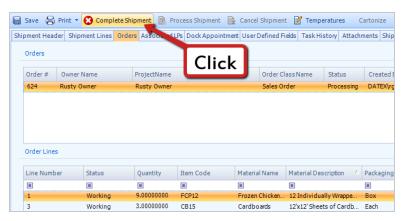
⚠️ **Note**

You may also access the Bill of Ladings and Signatures for individual Shipping Containers through the Right-click menu for the Shipping Container in question. The BOL and Signature captured at this level will

stay with just that Shipping Container, enabling you better control over the tracking of these important details on a more granular level.

Step 4. Review information and Complete

Once you've reviewed the information and made sure everything in the Shipment is accounted for, you can click the **Complete Shipment** button. This will **permanently close out the Shipment**, and will send all the details of the Shipment to your Billing Records, from which you can create Invoices.

Do so for every Shipment in your Order.

Create a Dock Appointment
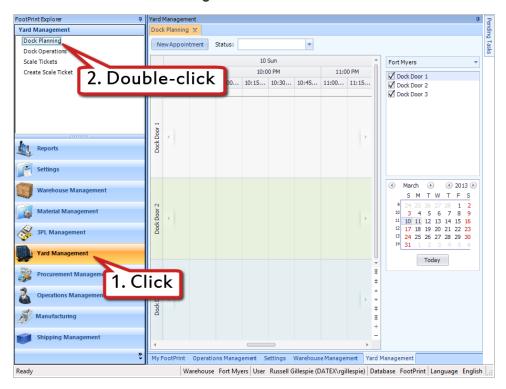
Dock Appointments allow you to schedule Shipments to your Dock Doors. They can be created within Shipments, from a Load Container, or in the Dock Planning section. Regardless of where the Appointment is created, the following steps are the same.

✔ Prerequisites
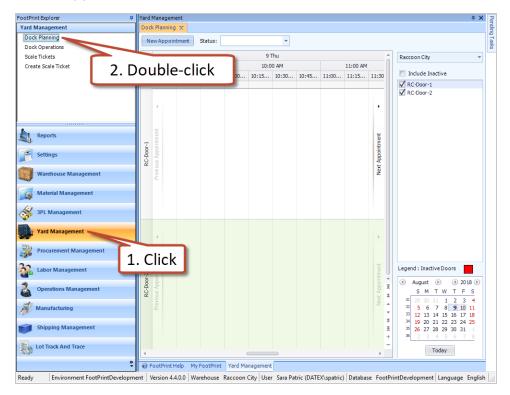
- Dock Door

Step 1. Open the Dock Planning section

1. Click the **Yard Management** module from the FootPrint Explorer.

2. Double-click the **Dock Planning** section.

Step 2. Create a new Appointment
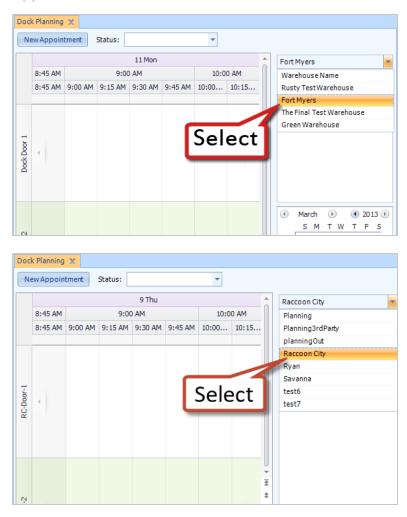
There are two ways to create a new Appointment from the Dock Planning section:

Click the **New Appointment** button.
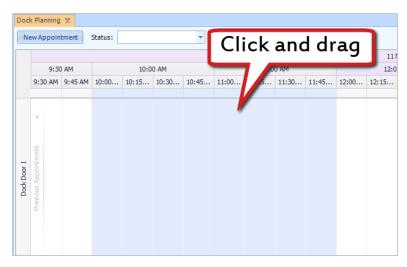
OR
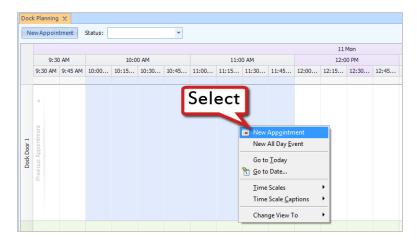
1. Select the **Warehouse** you would like the Appointment for from the drop-down list on the right side of the screen.

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Create a Dock Appointment

2. Highlight the time slot you want the Appointment to be for, along the row corresponding to the Dock Door you want the Appointment for, by clicking and dragging the cursor.

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3. Right-click the highlighted section, and select **New Appointment** from the drop-down list.
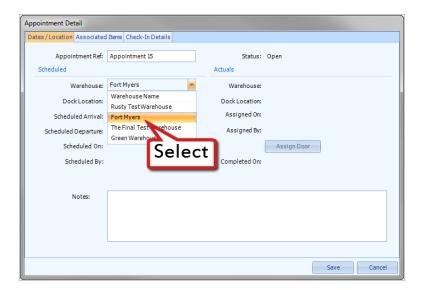
If you created the Appointment from a highlighted selection, you can skip Step 3.
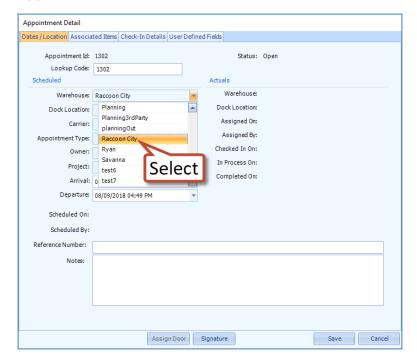
Step 3. Fill out Appointment Information

Once you've opened the Appointment Detail pop-up window, you can enter basic information under the **Dates/Location** tab. If you created the Appointment from a highlighted selection, this information has already been filled out for you.
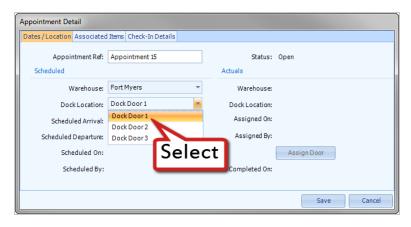
1. Select the **Warehouse** in which the Appointment will take place from the drop-down list.
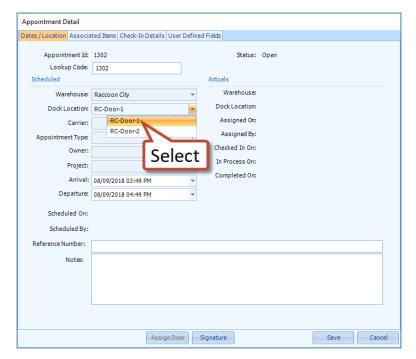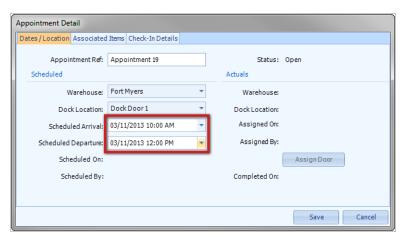
2. Select the **Dock Door Location** at which the Appointment will occur.
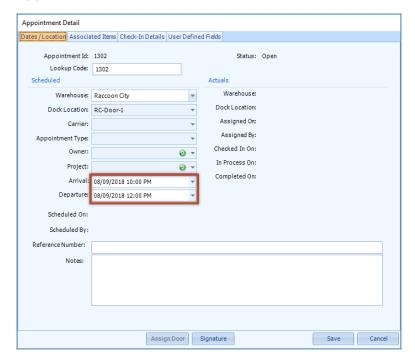
3. Set the **Scheduled Arrival** and **Scheduled Departure** times for the Appointment.

Step 4. Associate Items
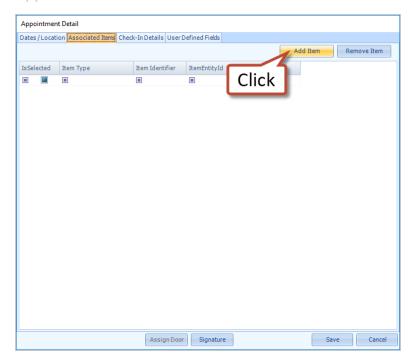
Your Appointment can have the following items associated with it: Shipments, Orders, or Containers. You can associate as many different items as you'd like, but once something is associated with an Appointment, it cannot be added to other Appointments.

⚠ **Note**

When creating Appointments directly from a Shipment, Order, or Load Container, that item will be associate with it by default.
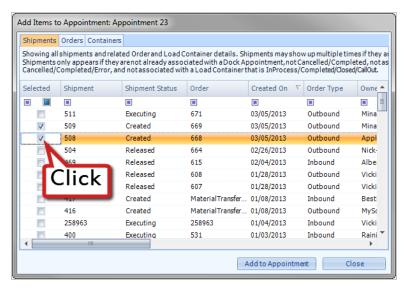
1. Under the Associated Items tab, click **Add Item**.
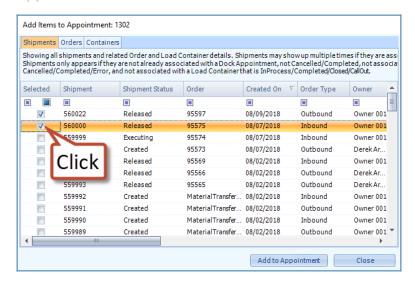
A new pop-up window will open, from which you can select items to add.
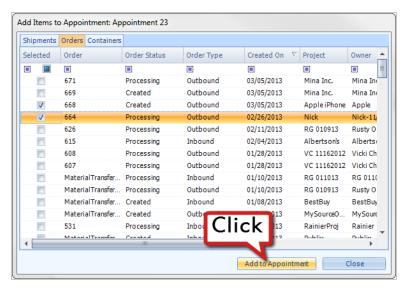
2. Under the tab you'd like to add an item from (**Shipments**, **Orders**, or **Containers**), put a check in the box next to each item you'd like to add to this Appointment.
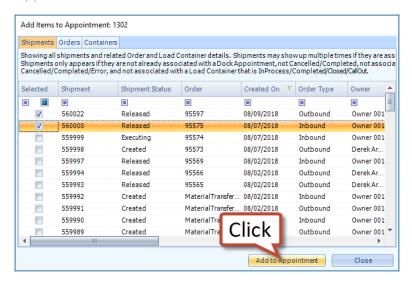
You can add as many items as you'd like, from as many tabs as you'd like.
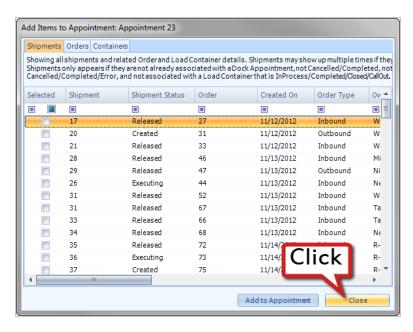
3. Click the **Add to Appointment** button to add the selected items.
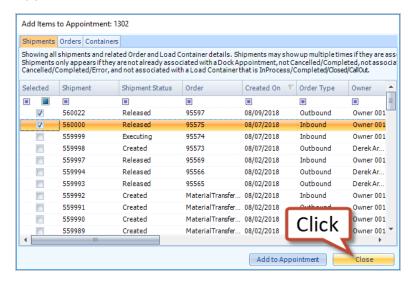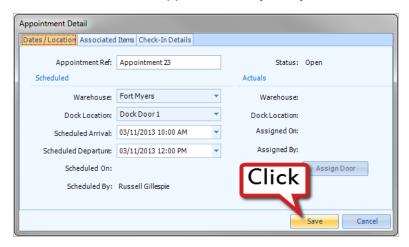
4. Once you've added all the items you'd like to your Appointment, click the **Close** button.
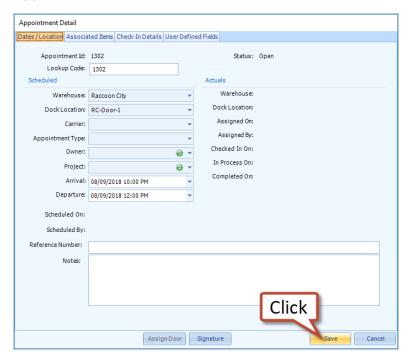
Step 5. Save the Appointment

Click the **Save** button to save the Appointment in your system.

Appointment Detail

Dates / Location | Associated Items | Check-In Details | User Defined Fields

Appointment Id: 1302   Status: Open
Lookup Code: 1302

Scheduled   Actuals

Warehouse: Raccoon City   Warehouse:
Dock Location: RC-Door-1   Dock Location:
Carrier: Assigned On:
Appointment Type: Assigned By:
Owner: Checked In On:
Project: In Process On:
Arrival: 08/09/2018 10:00 PM   Completed On:
Departure: 08/09/2018 12:00 PM

Scheduled On:

Scheduled By:

Reference Number:

Notes:

Click

Assign Door | Signature | Save | Cancel

Create a Move Task

Move Tasks are orders to move Materials or License Plates from one place in your Warehouse to another. Once created, Move Tasks can be accessed and Completed from Mobile Devices or on the Desktop.

✓ Prerequisites

- **Warehouse**
- **Locations**
- **Materials**
- Inventory in your Warehouse
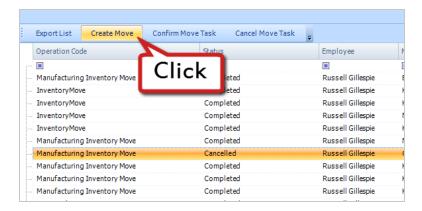
Step 1. Open the Move Tasks section

1. Click the **Warehouse Management** module in the FootPrint Explorer.

2. Double-click **View Move Tasks** under the **Operations** heading.

Step 2. Create a Move Task

Click the **Create Move** button.

A Move Task Creation Wizard window will pop up.

Step 3. Edit Move Task

There are two types of Move Tasks you can choose from - License Plate Move, to move an entire License Plate from one Location to another, or Inventory Move, to move Materials directly from one or more License Plates to another Location and License Plate.
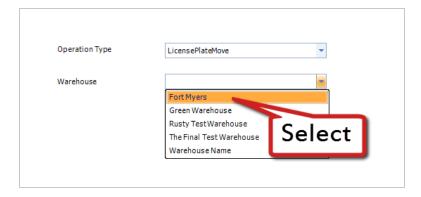
License Plate Move

## Step 3.1. Select Operation Type
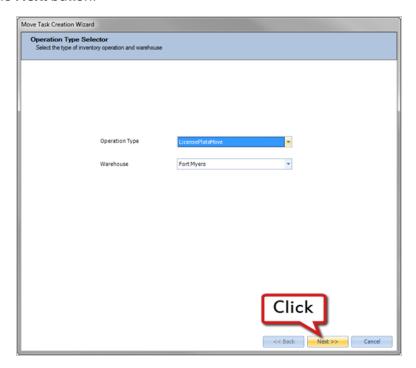
1. Select **License Plate Move** from the **Operation Type** drop-down list.


2. Select the **Warehouse** in which the Move will be occurring.
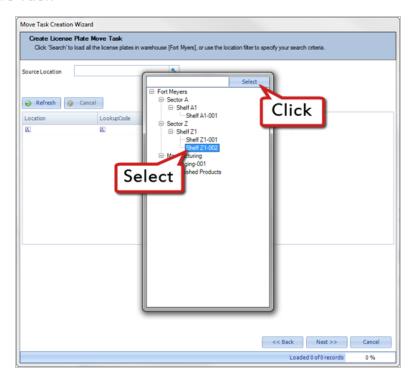
3. Click the **Next** button.
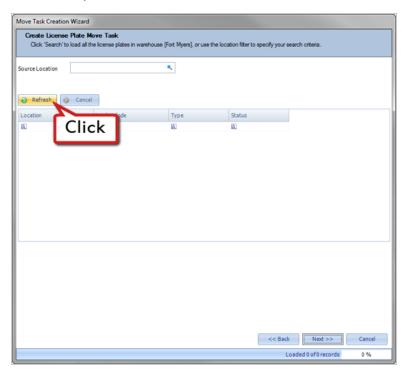
Step 3.2. Select License Plate
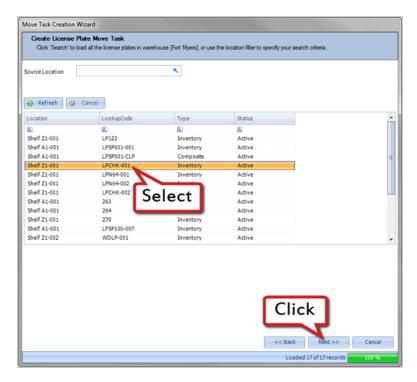
1. You can select a specific **Source Location** to search for License Plates, or you can skip this step and search the whole Warehouse.

2. Click the **Refresh** button to display the available list of License Plates in your Warehouse, or in the specified Location.
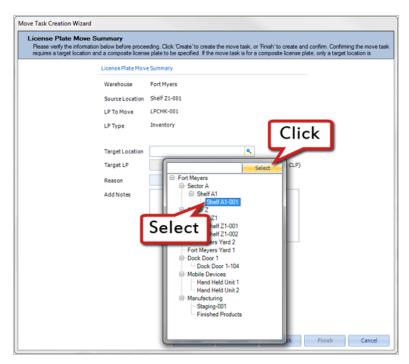
3. Select the License Plate you'd like to move from the list, then click the **Next** button.
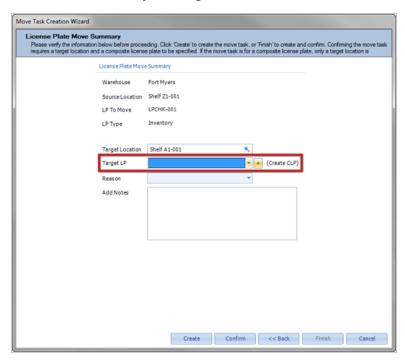
Step 3.3. Create Task
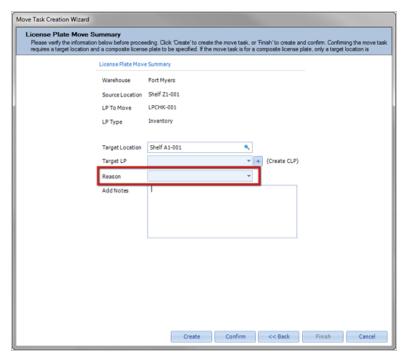
1. **(Optional)** Select the **Target Location** to which you will be moving the License Plate.
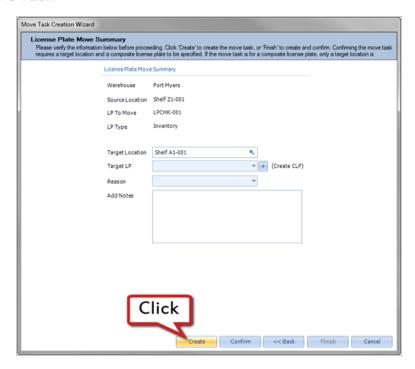
2. (Optional) You can select a **Target License Plate** if you'd like to add the License Plate you are moving to a Composite License Plate. You can create a new Composite License Plate by clicking the **+** button.
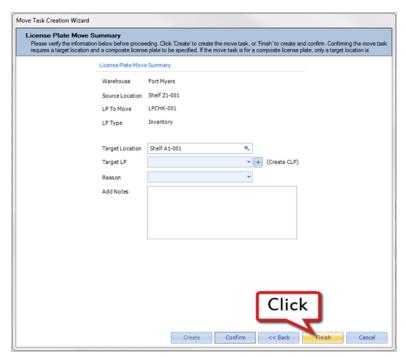
3. (Optional) You can add a **Reason Code** for the Move if you have any set up.

4. Click the **Create** button to create the Move Task.

5. From here, you can either click **Confirm** to confirm the Move Task has been completed, or click **Finish** to leave the Move Task open and complete it later.
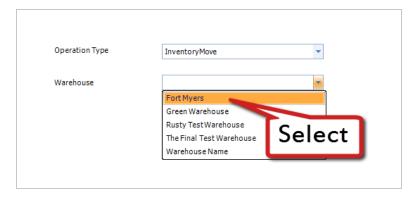
Inventory Move

Step 3.1. Select Operation Type
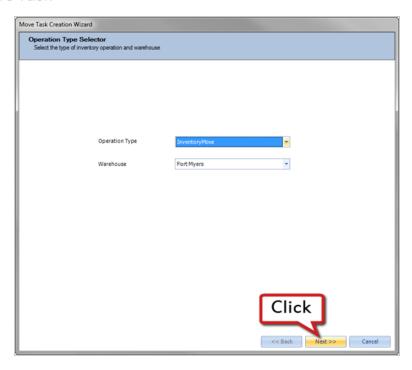
1. Select **Inventory Move** from the **Operation Type** drop-down list.

2. Select the **Warehouse** in which the Move will be occurring.
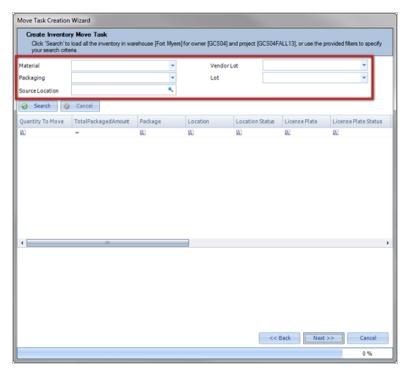
3. Click the **Next** button.
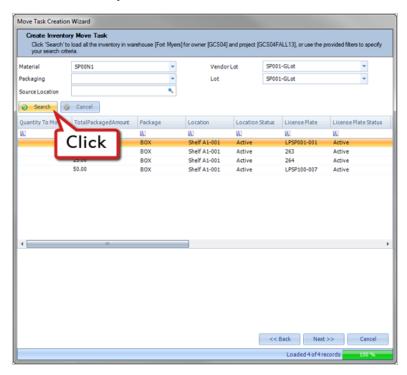
Step 3.2. Select Inventory

1. You can filter the Inventory to Move by **Materials**, **Packaging**, **Location**, **Lot** or **Vendor Lot**, or you can skip this step and search for all Inventory.
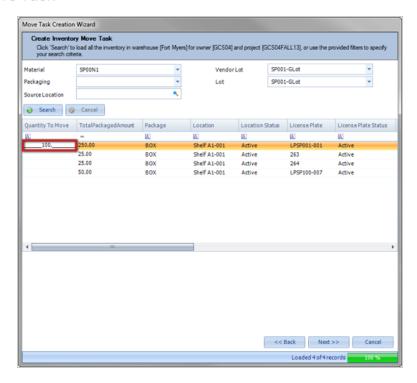
2. Click the **Search** button to display the available list of Inventory in your Warehouse, or filtered how you chose.
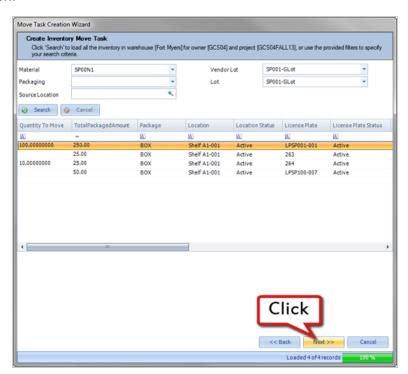
3. Select the Inventory you'd like to Move from the list, and enter the **Quantity** you will be moving.

⚠ Note

You can only move one type of Material per Inventory Move Task.
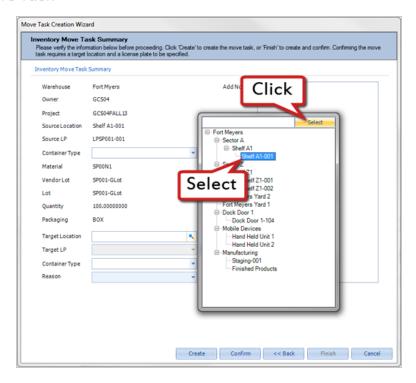
4. Once you've set the Quantities for all the Materials you will be moving, click the **Next** button.
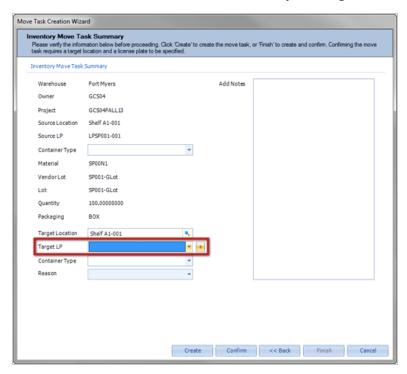
Step 3.3. Create Task
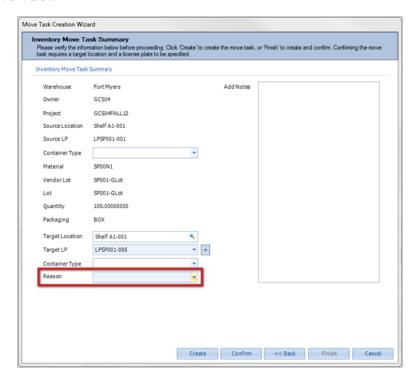
1. (Optional) Select the **Target Location** to which you will be moving the Inventory.
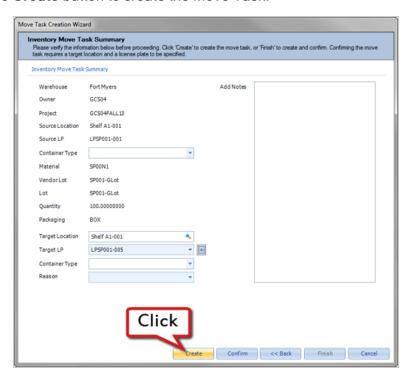
2. **(Optional)** Select a **Target License Plate** you'd like to add the Inventory you are moving to. You can also create a new License Plate by clicking the **+** button.

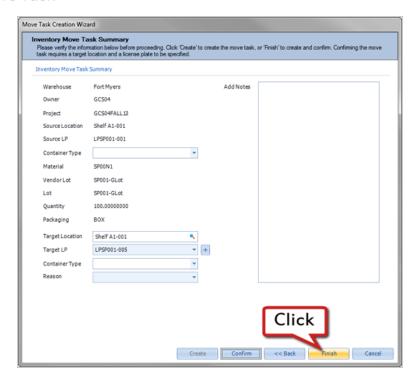3. **(Optional)** You can add a **Reason Code** for the Move if you have any set up.

4. Click the **Create** button to create the Move Task.

5. From here, you can either click **Confirm** to confirm the Move Task has been completed, or click **Finish** to leave the Move Task open and complete it later.

Complete a Move Task
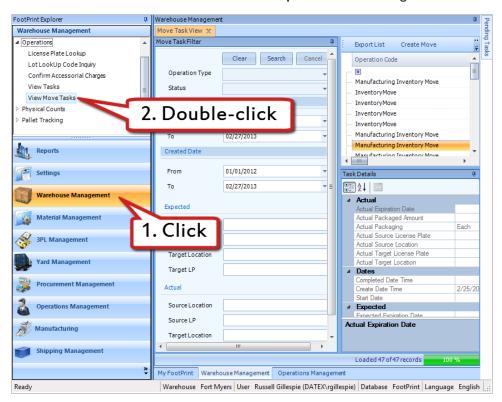
While physically moving Inventory or License Plates in the Warehouse, you must complete the Move Task in FootPrint to update its Location in the system.

✓ Prerequisites

- **Warehouse**
- **Locations**
- **Materials**
- Inventory in your Warehouse
- **Released Move Task**
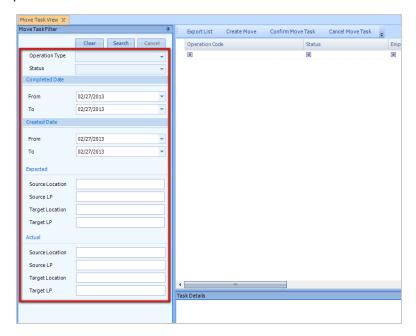
Step 1. Open the Move Tasks section

1. Click the **Warehouse Management** module in the FootPrint Explorer.

2. Double-click **View Move Tasks** under the **Operations** heading.

Step 2. Search for Move Task

1. You can filter your search for Move Tasks by entering information in the Move Task Filter pane.

2. Once you've entered specific information you'd like to filter by, click the **Search** button.

Step 3. Complete the Move Task

1. Select the Move Task you are going to complete from the list.
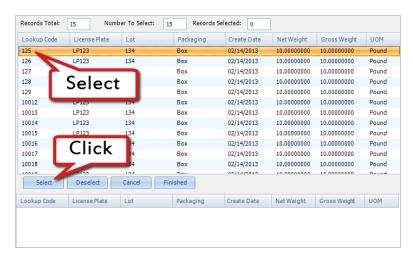
2. Click the **Confirm Move Task** button.

A Confirm Move Task pop-up window will open.

3. Review the information displayed, and enter any information that was not already set in the Move Task creation. If anything is incorrect, you can change it here. Once everything is set, click the **Confirm** button.
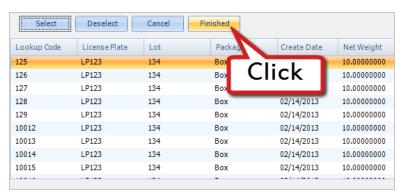
4. If you are moving a Material that is Serial Controlled, a pop-up will ask you to select all Serial Numbers you will be moving. Highlight the Serial Numbers you want to Move (you can select multiple by holding the **Shift** or **Ctrl** keys), then click **Select**.

5. Click the **Finish** button once you've selected all the Serial Numbers you need. You will then have to click **Confirm** once again.

Complete a Inventory Move
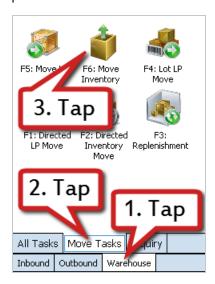
You can complete an Inventory Move on the fly from the Mobile Device, moving Inventory from one License Plate to another, and the system will be updated with the new information.

✅ **Prerequisites**

- **Warehouse**
- **Locations**
- Inventory in your Warehouse

Step 1. Open the Move Inventory section

1. Tap the **Warehouse** tab.
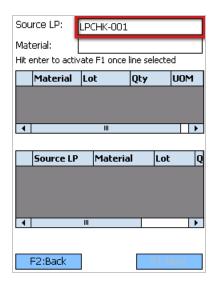
2. Tap the **Move Tasks** tab.
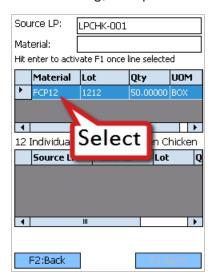
3. Tap **Move Inventory** or press **F6**.

Step 2. Select Inventory

1. Scan or enter the **Source License Plate** from which you will be moving Inventory. You can specify further by scanning or entering the **Material** you are

going to be moving.

2. Select the Material you will be moving, then press **Enter**.

3. Enter the **Amount** of Materials you will be moving, and make sure you have selected the appropriate **Packaging**.
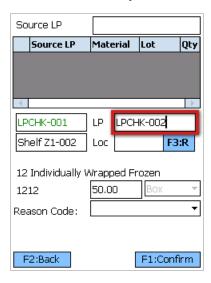
4. Tap **Accept** or press **Enter**.

5. You will be brought back to the Inventory Select screen, now with the Move information in the lower part of the screen. Tap **Next** or press **F1**.
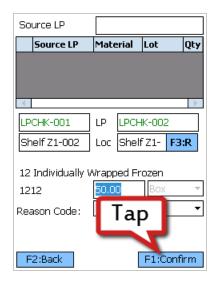
Step 3. Complete Move

1. Enter or scan the **License Plate** or **Location** you will be moving the Inventory to. You can also tap or press **F3:R** to have the system recommend a Location for you.

The Location will be automatically entered for you if you entered a License Plate, but you will need to enter a License Plate if you entered a Location.
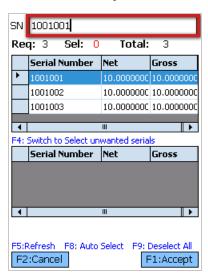
2. Confirm the amount you will be moving, then tap **Confirm** or press **F1**.

Step 3.1. Scan or Select Serial Numbers if necessary
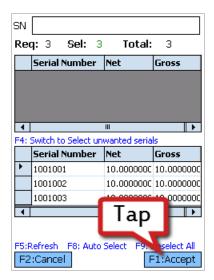
If your Material has individual Serial Numbers assigned to it, you will need to scan or enter them at this point.

    1. You can either scan each individual **Serial Number**, or you can tap or press **F8** to automatically select Serial Numbers for you.

    2. After entering all Serial Numbers, tap the **Accept** button or press **F1**.

Complete a License Plate Move

You can complete a License Plate Move on the fly from the Mobile Device, moving a License Plate from one Location to another, and the system will be updated with the new information.

> ✅ **Prerequisites**
>
> - **Warehouse**
> - **Locations**
> - License Plates in your Warehouse
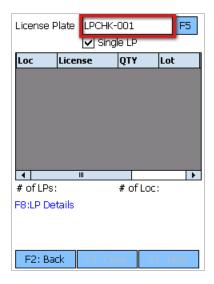
Step 1. Open the Move LP section

1. Tap the **Warehouse** tab.

2. Tap the **Move Tasks** tab.
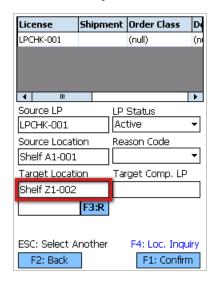
3. Tap **Move LP** or press **F5**.

Step 2. Select License Plate

Scan or enter the **License Plate** LookUp Code, and tap or press **F5**.
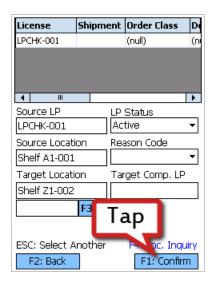
Step 3. Complete Move

1. Enter the **Target Location** to which you will be moving the License Plate. You can also tap or press **F3:R** to have the system recommend a Location.

2. Tap **Confirm** or press **F1**.

Change a Lot Status

Individual Material Lots each have a Status that determines whether the inventory belonging to that Lot is Active or Inactive. Any Status other than Active is technically an Inactive Status to the system.
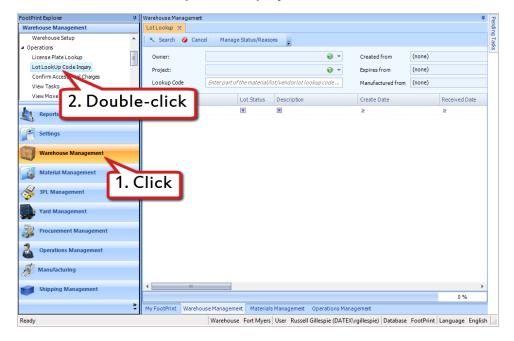
⚠ Note

Location, License Plate, Lot, and Material Statuses are all independent of each other. If any of a Material's related Statuses are Inactive, the Material cannot be Picked for Shipment or used for Manufacturing.

✔ Prerequisites

- None, but unique Inventory Statuses can be used as Lot Statuses

Step 1. Open the Lot LookUp Code Inquiry section

1. Click the **Warehouse Management** module in the FootPrint Explorer.
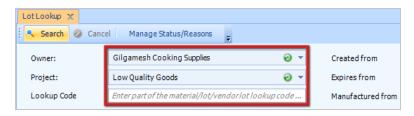
2. Double-click the **Lot LookUp Code Inquiry** section.

Step 2. Change the Lot's Status

1. Enter terms by which to search for Lots. This can include the name of the Lot's **Owner** or **Project**, its Material/Lot/Vendor Lot **LookUp Code**, or even dates related to the **Creation**, **Expiration**, or **Manufacture** of the Lot. You can also leave all fields blank to search all Lots.

2. Click the **Search** button.

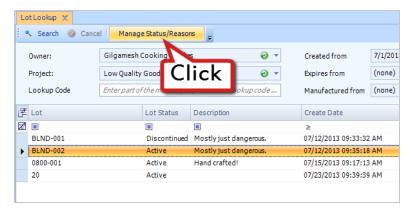A list of all Lots matching the terms will populate.

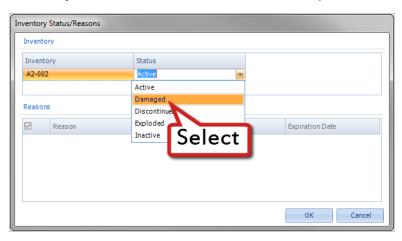3. Select the **Lot** for which you'd like to change the Status.

4. Click the **Manage Status/Reasons** button.

The **Inventory Status/Reasons** pop-up window will open.
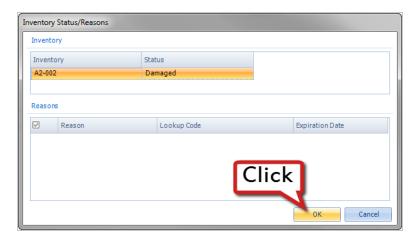
Change a Lot Status

5. Select the **Status** you'd like to set for the Lot from the drop-down menu.

6. Click the **OK** button.

The Lot will be set to the chosen Status.

Change a License Plate Status

Each License Plate in your Warehouse has a Status that determines whether the inventory belonging to that License Plate is Active or Inactive. Any Status other than Active is technically an Inactive Status to the system.

Inactive License Plates can still be Moved, as can Inventory to and from the License Plate.

⚠ Note

Location, License Plate, Lot, and Material Statuses are all independent of each other. If any of a Material's related Statuses are Inactive, the Material cannot be Picked for Shipment or used for Manufacturing.

✓ Prerequisites
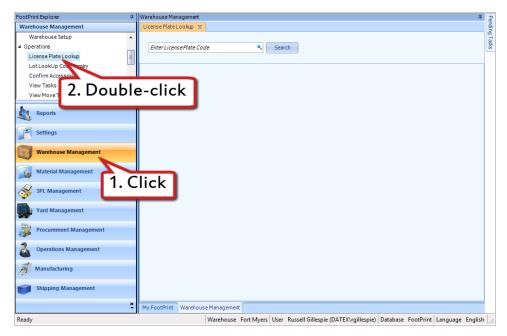
- None, but unique Inventory Statuses can be used as License Plate Statuses

Step 1. Open the License Plate LookUp section
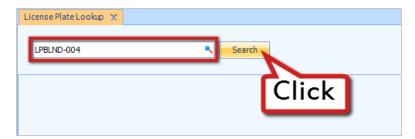
1. Click the **Warehouse Management** module in the FootPrint Explorer.
2. Double-click the **License Plate LookUp** section.

Step 2. Change the License Plate's Status

1. Enter the **License Plate LookUp Code**.
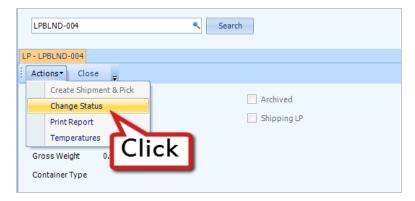
2. Click the **Search** button.

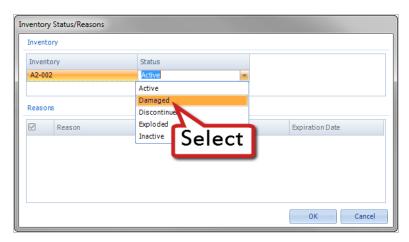The License Plate's information will populate in a new tab.

3. From the **Actions** drop-down list,click **Change Status**.

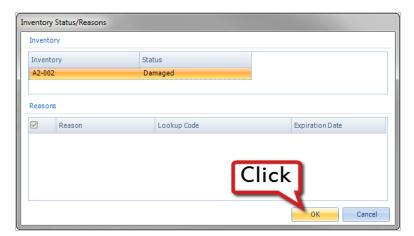The **Inventory Status/Reasons** pop-up window will open.

4. Select the **Status** you'd like to set for the License Plate from the drop-down menu.

5. Click the **OK** button.

The License Plate will be set to the chosen Status.

Change a Location Status

Locations, Areas, and Zones each have their own Status. When a Location is in an Inactive Status, Inventory cannot be Picked from it. Inventory and License Plates can still be Moved or Putaway to an Inactive Location.

When an Area or Zone's Status is changed, all Locations, Areas, and Zones underneath it inherit the new Status as well. These Child Locations can be changed back on their own and the Parent retains the changed Status, or the Parent can be changed to change its Child Locations back instead.
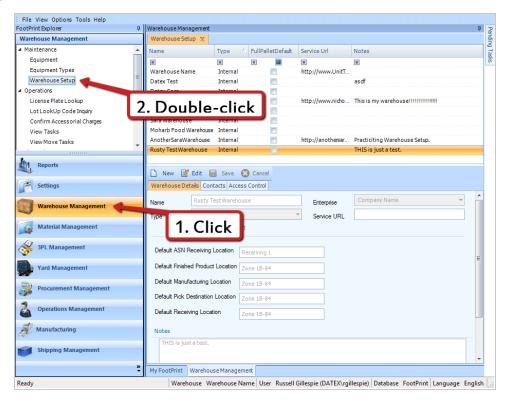
⚠ Note

Location, License Plate, Lot, and Material Statuses are all independent of each other. If any of a Material's related Statuses are Inactive, the Material cannot be Picked for Shipment or used for Manufacturing.

✔ Prerequisites

- None, but unique Inventory Statuses can be used as Location Statuses
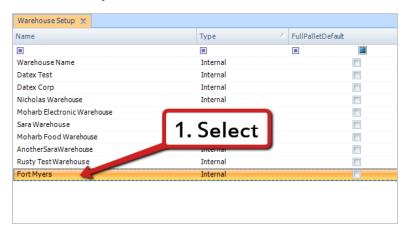
Step 1. Open the Warehouse Setup section

1. Click the **Warehouse Management** module in the FootPrint Explorer.

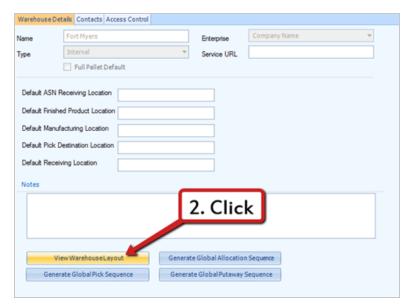2. Double-click the **Warehouse Setup** section.
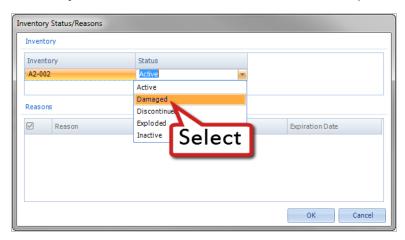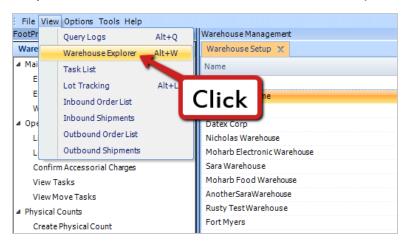
Step 2. Open the Warehouse Explorer

1. Select the Warehouse you want to edit.

2. Click the **View Warehouse Layout** button.

Alternatively, if the Warehouse is set as your Default Warehouse, you can click **Warehouse Explorer** from the **View** section of the Main Menu, or press **Alt+W**.

Step 3. Change the Location's Status

1. Double-click the **Warehouse**, **Zone**, **Area**, **Dock Door**, **Location**, **Yard Location**, or **Equipment Location** for which you'd like to change the Status.

2. Click the **Change Status** button.

The **Inventory Status/Reasons** pop-up window will open.

3. Select the **Status** you'd like to set for the Location from the drop-down menu.

4. Click the **OK** button.

The Location, and its Child Locations (if any), will be set to the chosen Status.

Create a Material Transfer

Material Transfers transfer ownership of specific Materials between one Owner and another, or one Project and another.

💡 Tip

Material Transfers can have Intermediaries, so that the Material appears to have been Transferred from one Owner to another, and then again to a third Owner. The first Owner will only see that their Materials were Transferred to the second, and the third Owner will only see that their Materials were Transferred from the second, masking the first and third from each other. There can be as many Intermediaries as you need.
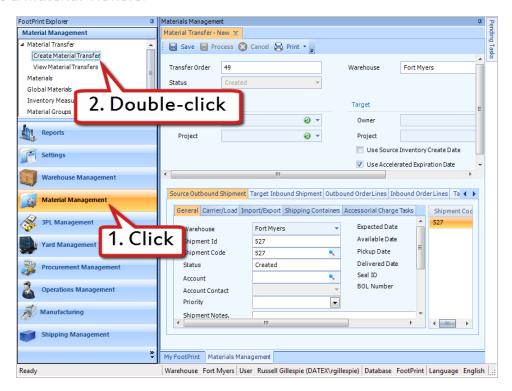
⚠ Note

Any Inbound or Outbound Orders involving Materials to be used during a Material Transfer must be closed before performing the Material Transfer.

✔ Prerequisites

- Warehouse
- Locations
- Default Pick Location
- Owner
- Project
- Materials
- Inventory in your Warehouse

Step 1. Create a new Material Transfer

1. Click the **Material** module in the FootPrint Explorer.

2. Double-click **Create Material Transfer** under the **Material Transfer** heading.
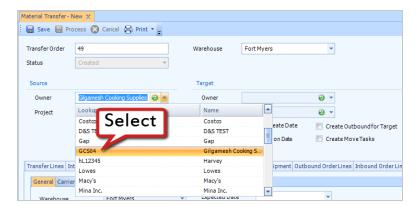
Step 2. Fill out Basic Information
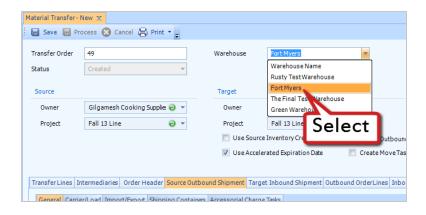
1. Select the **Warehouse** in which the Transfer will be occurring.
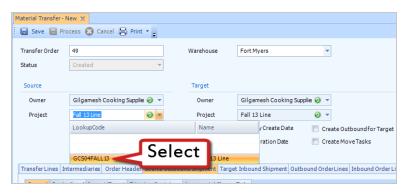
> ### ⚠ Note
>
> Material Transfers can only occur within one Warehouse.

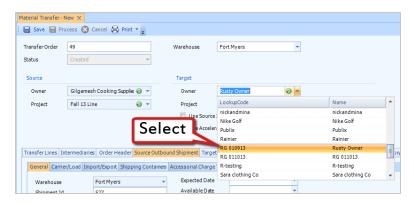2. Select the **Source Owner**, who currently owns the Materials you will be Transferring.

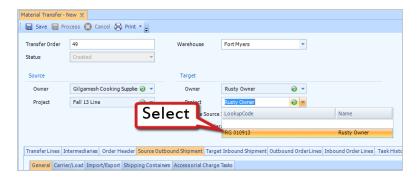3. Select the **Source Project**, under which the Transfer Materials are classified.

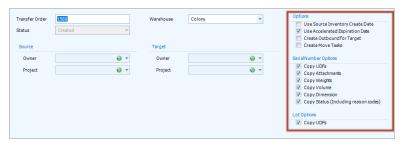The **Target Owner** and **Project** will automatically be filled in with the chosen **Source Owner** and **Project**.

4. Select the **Target Owner**, who will become the new Owner of the Materials. This can remain the same Owner as the Source if you are just Transferring Materials between Projects.

5. Select the **Target Project**, under which the Transfer Materials will soon be classified.

6. There are a number of available options for the Transfer. See the Create Material Transfer guide for more information on what each option does.
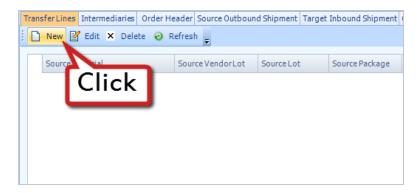
7. Click the **Save** button to save the Transfer Order and ready it for adding Materials.
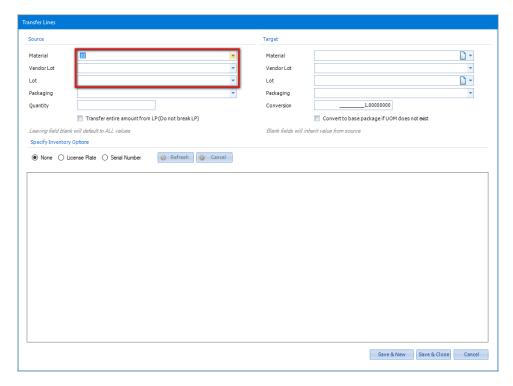
Step 3. Add Materials for Transfer

1. Under the **Transfer Lines** tab, click the **New** button.

A pop-up window will open, in which you can select the Materials you'd like to Transfer.

2. You can select the **Source Material** (the Material you will be Transferring to the new Owner or Project) from the Material drop-down list, or you can use the **Vendor Lot** or **Lot** drop-down list to similarly select a Material with specific Lot information. You do not need to specify all three fields, but you will at least need to select the Material.
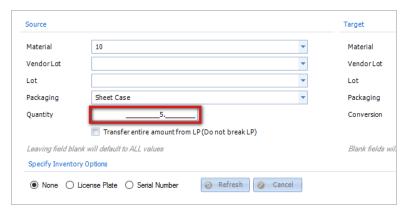
3. Select the **Packaging** of the Material you'd like to Transfer.
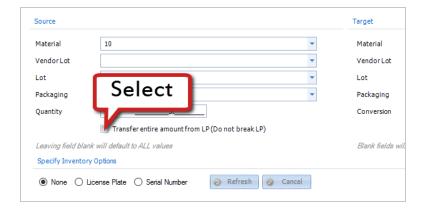
At this point, you can choose to have the system select the best available Materials to Transfer automatically based on the **Quantity** you select, or you can choose specific License Plates or Serial Numbers to Transfer the Material from.

Automatic Allocation

4.1. Enter the Quantity you'd like to Transfer in the **Quantity to Transform** field.
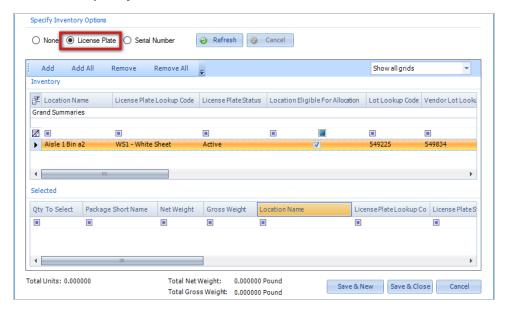
4.2. (Optional) By placing a check in the **Transfer all amount from LP** box, you can have the system adjust the Transfer Quantity to match the amount on the License Plate it automatically select during the Allocation process. Use this if you'd prefer to keep an entire License Plate together, rather than having to pull individual Materials from that License Plate to Transfer.

Specify License Plates

4.1. Select the **Specify License Plates** box.
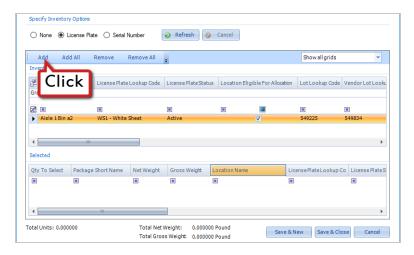
The License Plates that are displayed will match the Material, Vendor Lot, and Lot you have selected above.
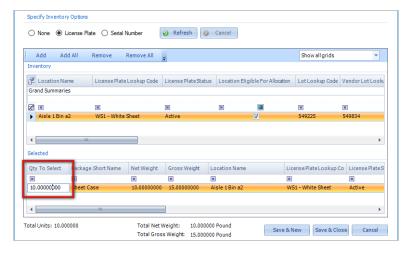
4.2. Select the License Plates you'd like to Transfer Materials from by ensuring the License Plate you want is highlighted and then click the **Add** button, which will add the License Plate to the Selected Grid below the Inventory Grid.
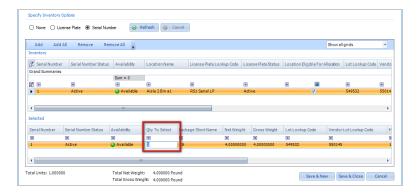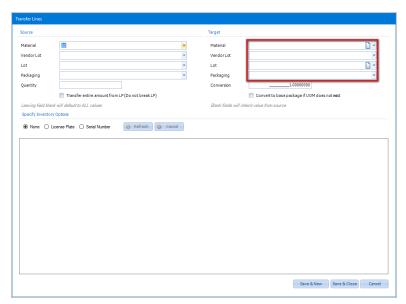
> ### ⚠ Note
>
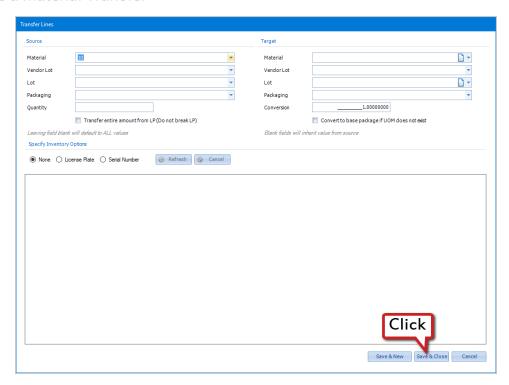> Make sure to select only Active License Plates that are Eligible for Allocation.

4.3. Specify the **Quantity** from each selected License Plate that you'd like to Transfer by entering the value in the **Qty To Select** field in the Selected Grid. By default, the entire Quantity will be entered.

Specify Serial Numbers

4.1. Select the **Serial Number** box.
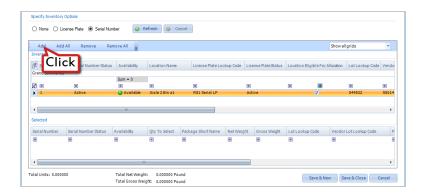
The License Plates that are displayed will be only those with Serial Numbers and that match the Material, Vendor Lot, and Lot you have selected above.

4.2. Select the License Plates you'd like to Transfer Materials from by ensuring the License Plate you want is highlighted and then click the **Add** button, which will add the License Plate to the Selected Grid below the Inventory Grid.

⚠ Note

Make sure to select only Active License Plates that are Eligible for Allocation.

4.3. Specify the **Quantity** from each selected License Plate that you'd like to Transfer by entering the value in the **Qty To Select** field in the Selected Grid. By default, the entire Quantity will be entered.

5. By leaving the Target information blank, the system will automatically create a new Material for the **Target Owner/Project** if it does not already exist underneath them. That Material's details will match the information you have selected here (Material Name and its details, Vendor Lot, Lot, and Packaging). Alternatively, you can click the **page icon** (⬜) in the Materials field to create a new Material for the Target that the existing Material will be Transferred to (see Setting Up a Material).
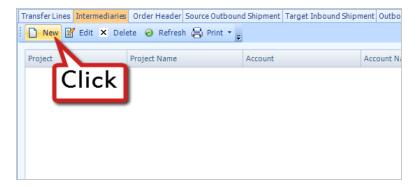

6. Click **Save**, or click **Save & New** to save this line and create a new one by repeating the steps above.
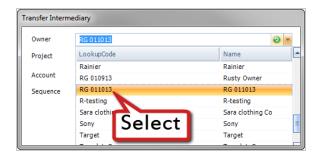
Step 4. (Optional) Add Intermediaries

If you'd like the Material to Transfer between multiple Owners, you can add them under the **Intermediaries** tab.

1. Click the **New** button to open the Transfer Intermediary pop-up window.

2. Select the **Owner** that will serve as an Intermediary.
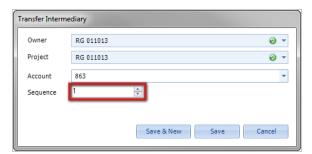
3. Select the Owner's **Project** through which the Material will Transfer.

4. **(Optional)** Select an **Account** as a contact for the Intermediary.

5. If you are using multiple Intermediaries, you will need to set each Intermediary's place in the Transfer **Sequence**.

6. Click the **Save** button, or click **Save & New** to save the current Intermediary and add another.

You can add as many Intermediaries as you'd like.

Step 5. Process the Material Transfer

Click the **Process** button on the top of the screen.

The processing may take a moment to complete.

Perform a Material Transformation

Material Transformations convert one Material into an entirely different Material. This can be useful when a product undergoes some sort of real-life processing or transformation, or even when breaking Materials down into different types of Packaging.
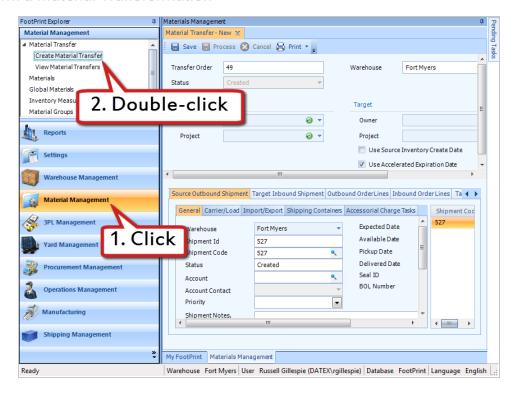
⚠ Note

Any Inbound or Outbound Orders involving Materials to be used during a Material Transformation must be closed before performing the Material Transformation.

✔ Prerequisites

- Warehouse
- Locations
- Default Pick Location
- Owner
- Project
- Materials
- Inventory in your Warehouse

Step 1. Create a new Material Transformation

1. Click the **Material** module in the FootPrint Explorer.

2. Double-click **Create Material Transfer** under the **Material Transfer** heading.

Step 2. Fill out Basic Information
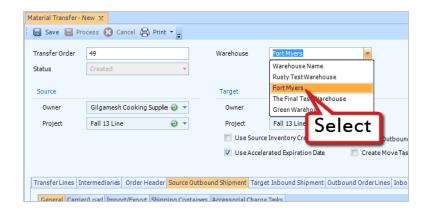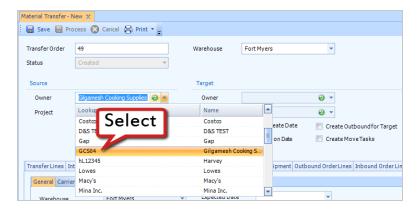
1. Select the **Warehouse** in which the Transformation will be occurring.

> ### ⚠ Note
>
> Material Transformations can only occur within one Warehouse.

2. Select the **Source Owner**, who currently owns the Materials you will be Transforming.
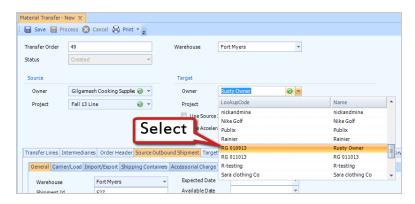
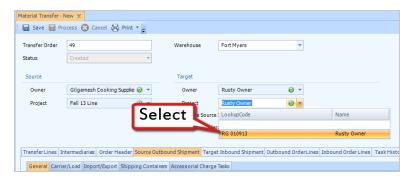3. Select the **Source Project**, under which the Materials are classified.

The **Target Owner** and **Project** will automatically be filled in with the chosen **Source Owner** and **Project**.

4. (Optional) If you wish to have the Transformed Material also Transfer to a different Owner, select the **Target Owner**. Otherwise, leave the **Target Owner** the same as the Source.
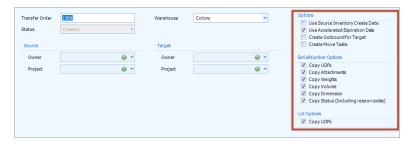
5. (Optional) If you wish to change the Project for the Materials, select the **Target Project**, under which the Transformed Materials will be classified. Otherwise,

leave the **Target Project** the same as the Source.

6. There are a number of available options for the Transfer. See the Create Material Transfer guide for more information on what each option does.
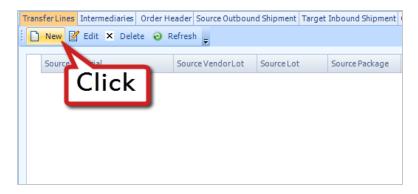
7. Click the **Save** button to save the Order and ready it for adding Materials.
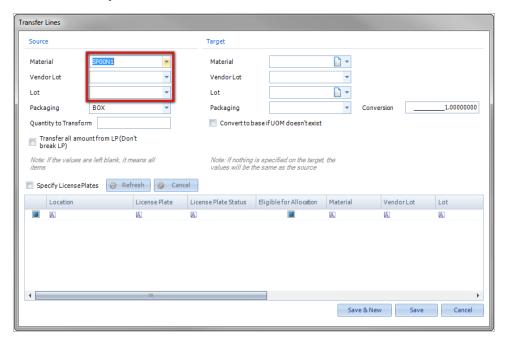
Step 3. Add Materials for Transformation

1. Under the **Transfer Lines** tab, click the **New** button.
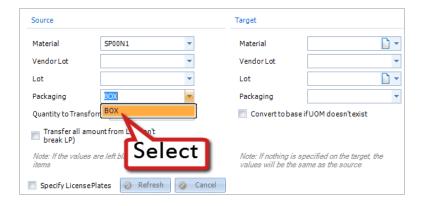
A pop-up window will open, in which you can select the Materials you'd like to Transform.

2. You can select the **Source Material** (the Material you will be Transforming) from the Material drop-down list, or you can use the **Vendor Lot** or **Lot** drop-down list to similarly select a Material with specific Lot information. You do not need to specify all three fields, but you will at least need to select the Material.
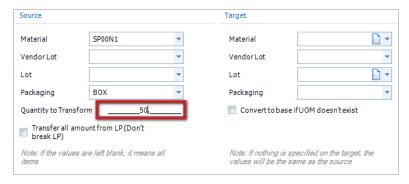
3. Select the **Packaging** of the Material you'd like to Transform.
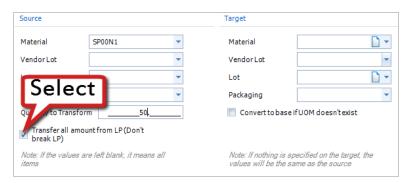
At this point, you can choose to have the system select the best available Materials to Transform automatically based on the **Quantity** you select, or you can choose specific License Plates to Transform the Material from.

Automatic Allocation

4.1. Enter the Quantity you'd like to Transform in the **Quantity to Transform** field.
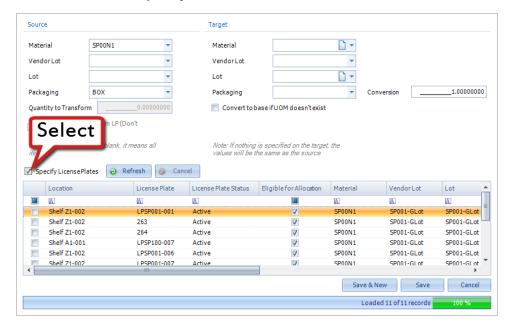
4.2. (Optional) By placing a check in the **Transfer all amount from LP** box, you can have the system adjust the Transform Quantity to match the amount on the License Plate it automatically select during the Allocation process. Use this if you'd prefer to keep an entire License Plate together, rather than having to pull individual Materials from that License Plate to Transform.

Specify License Plates

4.1. Put a check in the **Specify License Plates** box.
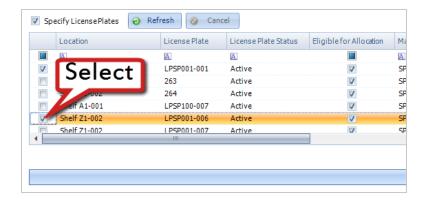
The License Plates that are displayed will match the Material, Vendor Lot, and Lot you have selected above.
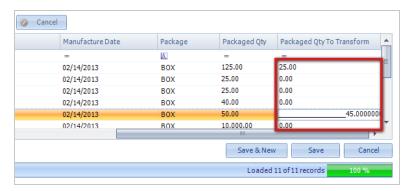
4.2. Select the License Plates you'd like to Transform Materials from by putting a check in the box by each License Plate.
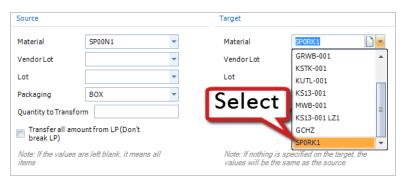
⚠ Note

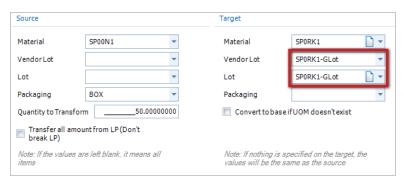Make sure to select only Active License Plates that are Eligible for Allocation.

4.3. Specify the **Quantity** from each selected License Plate that you'd like to Transform by entering the value in the last field to the right. By default, the entire Quantity will be entered.
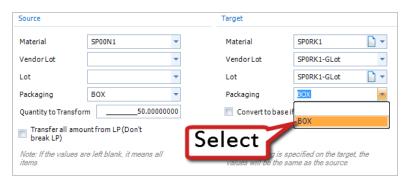
5. Select the **Target Material** you will be Transforming the Source Material into. Alternatively, you can click the **page icon (□)** in the Materials field to create a new Material (see Setting Up a Material).
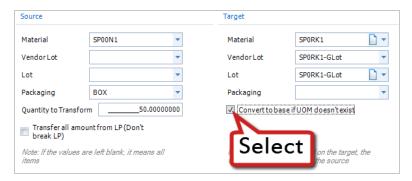
6. Select a **Vendor Lot** and **Lot** for the newly Transformed Material. If you leave these fields blank, the system will attempt to bring over the Lot information from the existing Material.
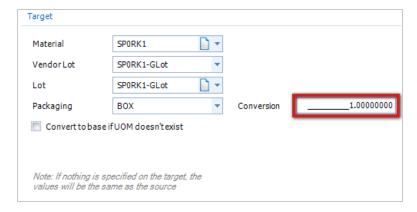
7. Select the **Target Packaging** type. If you were Transforming a Material simply between Packaging Types, this is the only Target field you would need to update.
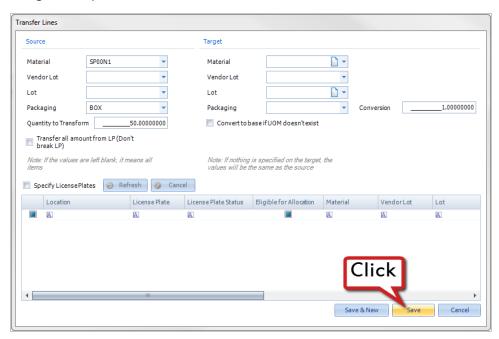
8. If you have left the **Packaging** field blank, but the **Target Material** does not have the specified Packaging Type set up for it, you can check the **Convert to base if UOM doesn't exist** box to have the system automatically select the Base Packaging Type to Transform the Material into; otherwise, you may obtain an error when attempting the Transformation.

9. Finally, the **Conversion** field is where you set the factor by which you will convert the Material. For every one of the existing Material, you will create this many of the new Material. If you leave the Conversion set to 1, you will get the same Quantity out as you Transform. You can also set a decimal value to deal with fractions. For example, if you set the Conversion value to 0.5, you will get one new Material for every two Source Materials consumed.
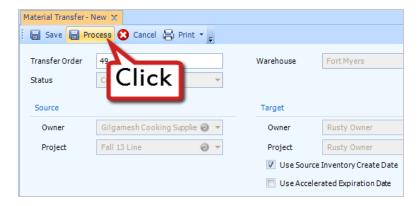
10. Click **Save**, or click **Save & New** to save this line and create a new one by repeating the steps above.

Step 4. Process the Material Transformation

Click the **Process** button on the top of the screen.
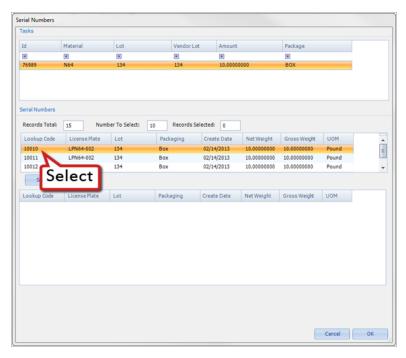
The processing may take a moment to complete.
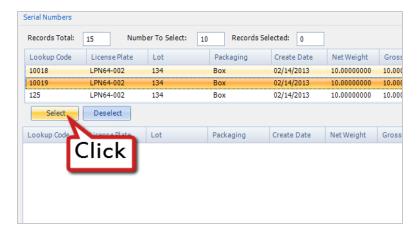
Step 5. Select Serial Numbers if necessary

If the Source Material you are Transforming is Serial Controlled, you will have to select Serial Numbers from those available in your Inventory. During processing, a pop-up window will appear.

1. Highlight the Serial Numbers you would like to Transform. You can select multiple by holding **Ctrl** or **Shift** while you click.
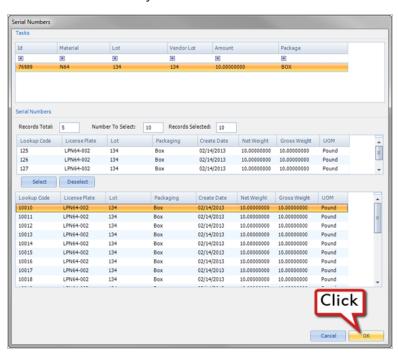
2. Click the **Select** button to add the Serial Numbers you have selected to the Transformation list. The amount remaining will appear in the **Number to Select** field. Continue selecting until the field reads "0".

3. Click the **OK** button to confirm your selected Serial Numbers for Transformation.

Create a Work Order

Work Orders are a collection of Accessorial Charges - simple tasks or procedures that take place in the Warehouse.

💡 Tip
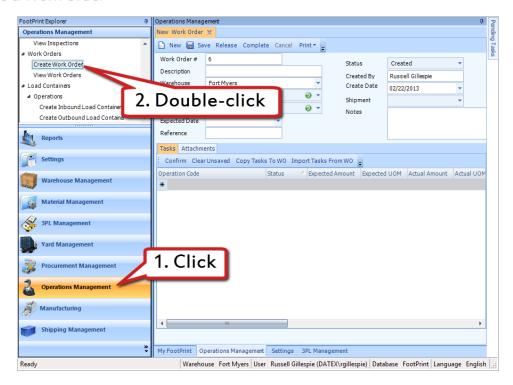
If they are regular tasks, you can set up a Work Order as a Template, or work from an existing Work Order, and copy over tasks so that they'll only need to be created once. See the Import / Export Tasks info below.

✅ Prerequisites

- Owner
- Project
- Warehouse
- Locations
- Accessorial Charges
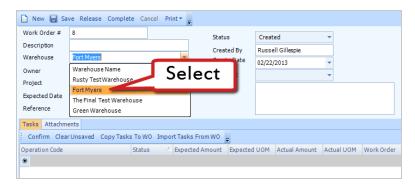
Step 1. Create a new Work Order

1. Click the **Operations Management** module in the FootPrint Explorer.

2. Double-click **Create Work Order** under the **Work Order** heading.
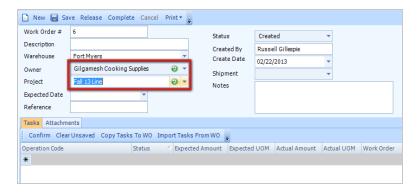
Step 2. Enter Work Order Information
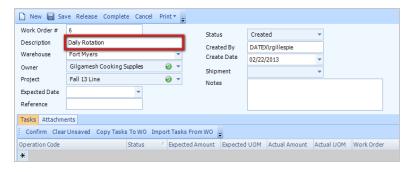
1. Select the **Warehouse** for the Work Order.

2. Select the **Owner** the Work Order is for.

3. Select the **Project** the Work Order is under.
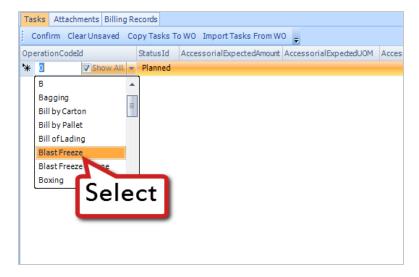
4. (Optional) Add a **Description** of what the Work Order is for.
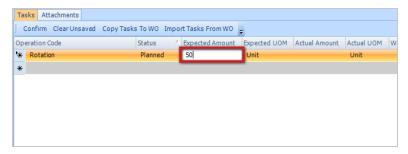

Step 3. Add Tasks to the Work Order

Click the grey line to add a new Task to the Order.

1. Select the **Operation Code** from the drop-down list. This list will consist of all Accessorial Charges in the system if the "show all" box is checked, otherwise it will only show the Accessorial Charges related to the selected project.

2. Enter the **Expected Amount** of work for the Order. For example, how many feet of shrink wrap you expect will be used, or how many labels will be applied. This number is in terms of the **Expected Unit of Measurement**.
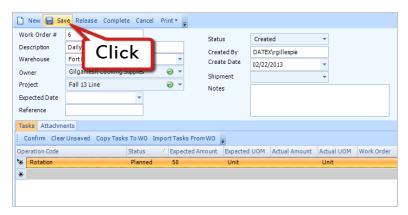
Continue adding Tasks this way until you have added all the Tasks you'd like for this Order.

(Optional) Import or Export Tasks

If you would like to use the Work Order as a template for other Work Orders, or would like to use an existing Work Order as a template for your current Work Order, you can do so by using the **Copy** and **Import** buttons.

To Copy Tasks to another Work Order:
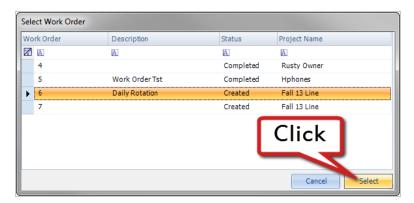
1. Click the **Save** button to Save your Work Order.

2. Click the **Copy Tasks To WO** button.
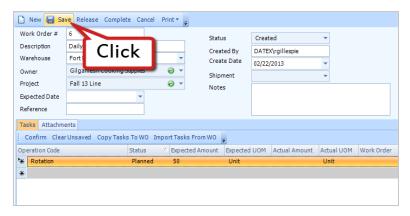
3. A pop-up window will open, allowing you to select the Work Order you'd like to send Tasks to from your current Work Order. Select that Work Order, the click the **Select** button.
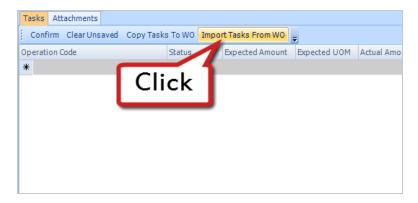

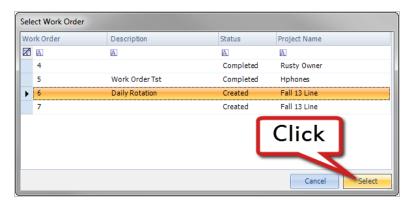## To Import Tasks from an Existing Work Order:

1. Click the **Save** button to Save your Work Order.
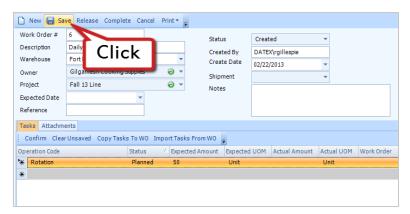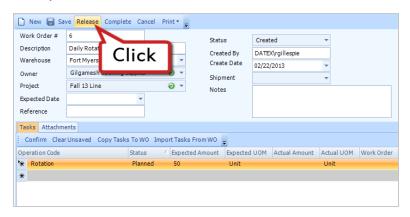

2. Click the **Import Tasks From WO** button.

3. A pop-up window will open, allowing you to select the Work Order you'd like to use as a template for your current Work Order. Select that Work Order, the click the **Select** button.

Step 4. Save and Release Work Order

1. Click the **Save** button to Save the Work Order.

2. Click the **Release** button to make the Work Order available for completion on either the Desktop or Mobile Device.
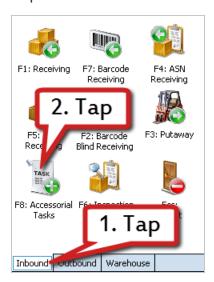
Complete a Work Order

Work Orders are a collection of Accessorial Charges - simple tasks or procedures that take place in the Warehouse.

✅ Prerequisites
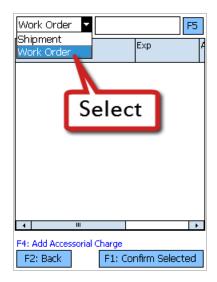
- Owner
- Project
- Warehouse
- Locations
- Accessorial Charges
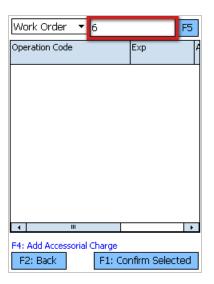- A Work Order to Complete

Step 1. Open the Work Order

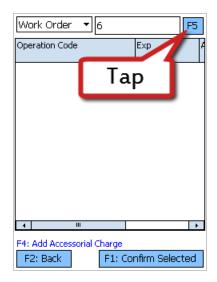1. Tap the **Inbound** tab.

2. Tap **Accessorial Tasks** or press **F8**.

3. Select **Work Order** from the drop-down list.
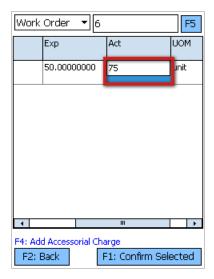
4. Scan or enter the **Work Order Number**.

5. Tap or press **F5** to load the Order.
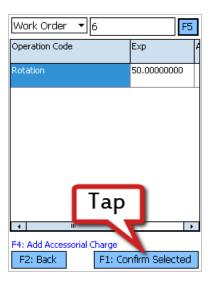
Step 2. Complete the Work Order

1. Enter the Actual Amount of work under the **Act** heading. Similarly to the **Expected Amount**, this corresponds to the **Actual Unit of Measurement**.

Do so for every Task in the Order.

2. Tap **Confirm Selected** or press **F1**. This will close out the Order and create any relevant Billing Records.
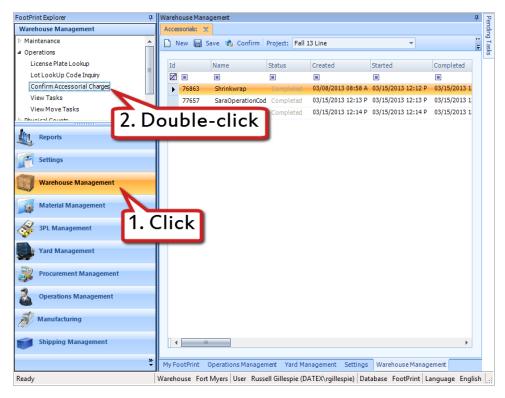
Create an Accessorial Charge

Accessorial Charges are a type of Operation Code that can be assigned to Shipments, Work Orders, or Projects, representing user-defined Tasks that are not covered under normal Warehouse Operations (such as labeling or shrink wrapping).

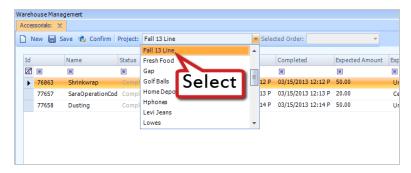### ✓ Prerequisites

- Owner
- Project
- Accessorial Charges

Step 1. Open the Confirm Accessorial Charges section

1. Click the **Warehouse Management** section in the FootPrint Explorer.

2. Double-click the **Confirm Accessorial Charges** section under the **Operations** heading.
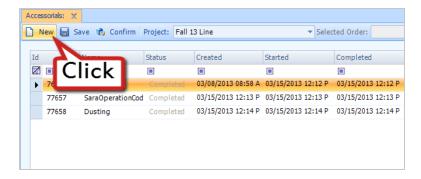
Step 2. Create a new Accessorial Charge

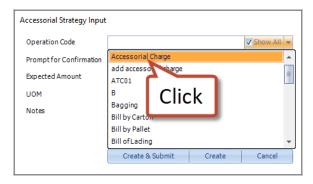1. Select the **Project** the Accessorial Charge will be for.
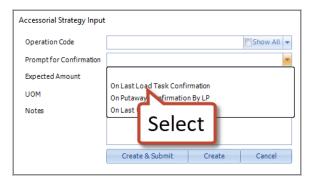

2. Click the **New** button.

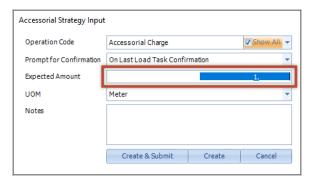A pop-up window will open.

3. Select the **Operation Code** that the Charge will be for.

(Optional) Select the **Prompt for Confirmation**. Choosing an option here will cause the Mobile Device to automatically prompt the User at the appropriate time to enter the actual amount of this Accessorial Charge.

4. Enter the **Expected Amount** of work that will be done, in the **Unit of Measure** displayed below. If a negative amount is entered here, the Billing Record generated will function as a credit to the associated Owner, rather than a charge.

5. Click the **Create** button to create the Charge, Releasing it to be completed. If the Task has already been completed, and the **Expected Amount** matches the actual amount of work done, you can click **Create & Submit** to complete the Charge as well.
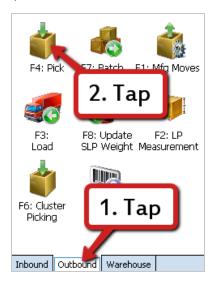
Add an Accessorial Charge During Picking

Accessorial Charges are user-defined Tasks that are not covered under standard FootPrint Warehouse Operations, which can be added to an existing Shipment or Work Order, or assigned directly to a Project, on the fly using the Mobile Device.

✔ Prerequisites

- Outbound Order
- Released Wave
- Inventory in your Warehouse

Step 1. Open the Picking Accessorial Tasks screen

1. Tap the **Outbound** tab.

2. Tap the **Pick** section, or press **F4**.

3. Enter or scan the **Load Container, Shipment, Pick Slip, Wave, or Shipping Container** you'd like to Pick for.

You may also select a Project from the **Project** drop-down list to filter all results by the chosen Project.
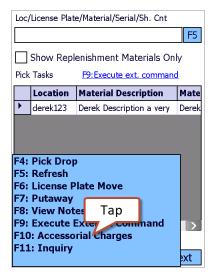
4. Press **F5** or tap **Search**.

5. Select the Shipment or Pick Slip you want to find the tasks for, and tap **Next** or press **F1**.

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6. Tap **F3: Menu** or press the **F3** key.

7. Tap **F10: Accessorial Charges** or press **F10**.

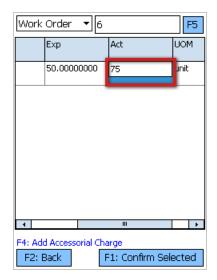## Step 2.(Optional) Complete the Accessorial Tasks

If there are any Accessorial Tasks assigned to it already, they will be listed here; otherwise, a pop-up will say no Tasks were found.
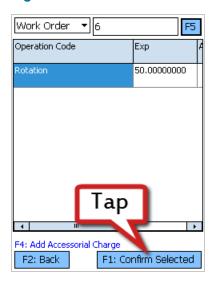
1. Enter the Actual Amount of work under the **Act** heading. Similarly to the **Expected Amount**, this corresponds to the **Actual Unit of Measurement**. If a negative amount is entered here, the Billing Record generated will function as a credit to the associated Owner, rather than a charge.
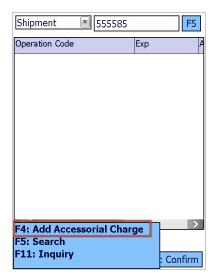
Do so for every Task in the Order.

2. Tap **Confirm Selected** or press **F1**. This will close out the Order and send all relevant information to Billing.
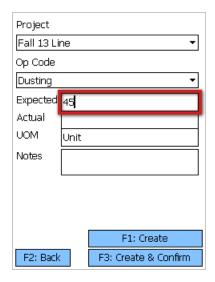

Step 3. Add Accessorial Charge

1. Press **F4** to add an Accessorial Charge.

2. Select the **Operation Code** you will be Charging for from the drop-down list.
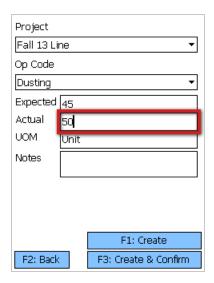

3. Enter the **Expected Amount** of work that will be done for the Charge (based on the Operation Code's **Unit of Measurement**).

At this point, you can tap **Create** or press **F1** to assign the Task to be completed later, or you can continue and complete the Task now.

4. Enter the **Actual Amount** of work done for the Charge (based on the Operation Code's **Unit of Measurement**). If a negative amount is entered here, the Billing Record generated will function as a credit to the associated Owner, rather than a charge.

5. Tap **Create & Confirm** or press **F3**.

Project

Fall 13 Line ▼

Op Code

Dusting ▼

Expected	45
Actual	50
UOM	Unit
Notes	

Tap

F1: Create

F2: Back   F3: Create & Confirm

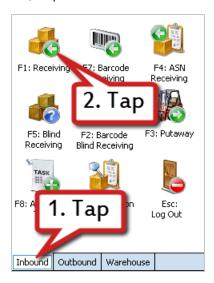# Add an Accessorial Charge During Receiving

Accessorial Charges are user-defined Tasks that are not covered under standard FootPrint Warehouse Operations, which can be added to an existing Shipment or Work Order, or assigned directly to a Project, on the fly using the Mobile Device.

> ### ✅ Prerequisites
>
> - **Inbound Order**
> - **Dock Locations**

Step 1. Open the Receive section

1. Tap the **Inbound** tab.
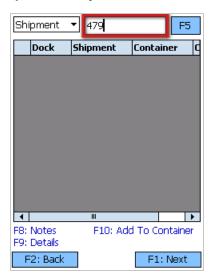
2. Tap the **Receiving** section, or press **F1**.

Step 2. Search for the Shipment, Order, or Door

1. From the drop-down list, select whether you'd like to search by **Shipment** Number, **Order** Number, or **Door** to Receive from.
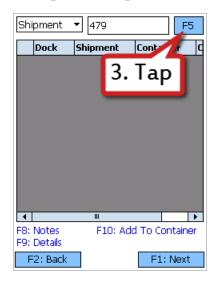
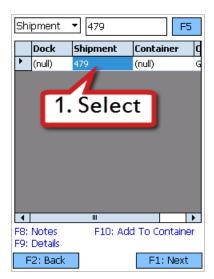2. Scan or enter the **LookUp Code** for your search.

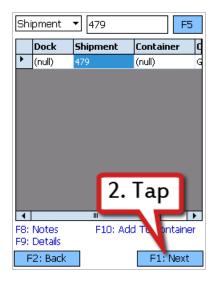3. If the Shipments do not automatically load, tap or press **F5**.

If the Shipment has not been Processed, you will be prompted to Process the Shipment before you can Receive it. If the Order Class for the Shipment has been set to disallow Processing from the Mobile Device, the search will return no results.
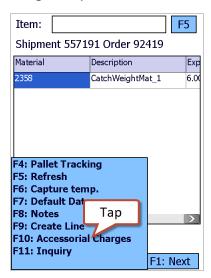
Step 3. Open the Receiving Accessorial Tasks screen

1. Select the item you'd like to Receive from the list.

7. Tap **Next** or press **F1**.

8. Tap **F3: Menu** or press the **F3** key.

9. Tap **F10: Accessorial Charges** or press **F10**.

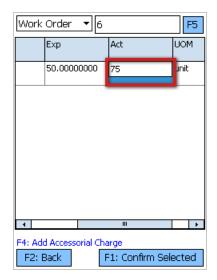## Step 4.(Optional) Complete the Accessorial Tasks

If there are any Accessorial Tasks assigned to it already, they will be listed here; otherwise, a pop-up will say no Tasks were found.
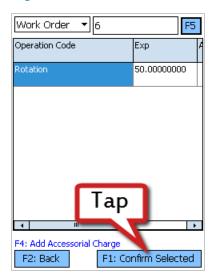
1. Enter the Actual Amount of work under the **Act** heading. Similarly to the **Expected Amount**, this corresponds to the **Actual Unit of Measurement**. If a negative amount is entered here, the Billing Record generated will function as a credit to the associated Owner, rather than a charge.
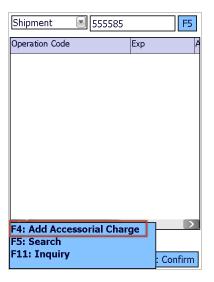
Do so for every Task in the Order.

2. Tap **Confirm Selected** or press **F1**. This will close out the Order and send all relevant information to Billing.
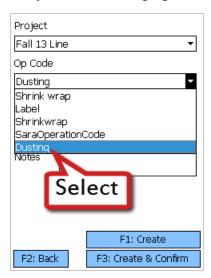

Step 5. Add Accessorial Charge

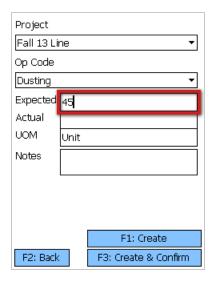1. Press **F4** to add an Accessorial Charge.

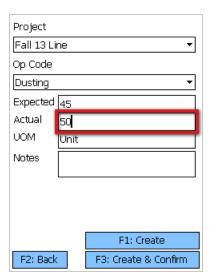2. Select the **Operation Code** you will be Charging for from the drop-down list.

3. Enter the **Expected Amount** of work that will be done for the Charge (based on the Operation Code's **Unit of Measurement**).
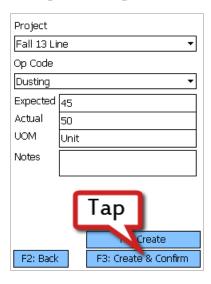
At this point, you can tap **Create** or press **F1** to assign the Task to be completed later, or you can continue and complete the Task now.

4. Enter the **Actual Amount** of work done for the Charge (based on the Operation Code's **Unit of Measurement**). If a negative amount is entered here, the Billing Record generated will function as a credit to the associated Owner, rather than a charge.

5. Tap **Create & Confirm** or press **F3**.

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Project
Fall 13 Line

Op Code
Dusting

Expected 45

Actual 50

UOM Unit

Notes

Tap

Create

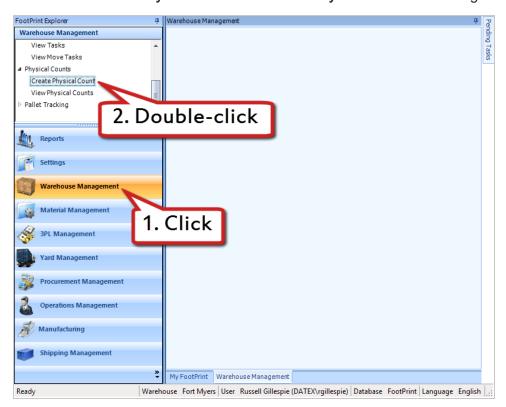F2: Back   F3: Create & Confirm

Create a Physical Count

Physical Counts, also known as Cycle Counts, are Tasks for workers to take a count of each specified item in your Inventory. These can be set up to occur only once at a specified time, or recur over a schedule you design.

✔ Prerequisites

- **Warehouse**
- **Locations**
- **Materials**
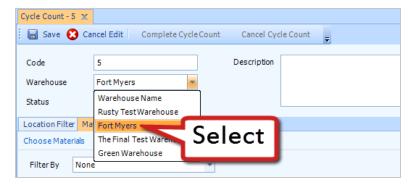- Inventory in your Warehouse

Step 1. Create a new Physical Count

1. Click the **Warehouse Management** module in the FootPrint Explorer.

2. Double-click **Create Physical Count** under the **Physical Counts** heading.

Step 2. Edit the Physical Count

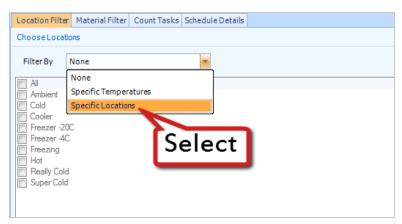First, you will need to select the **Warehouse** in which the Count will be occurring.

Next, you have the option to filter your Count by **Location** or **Materials**. There are many different options within these tabs, and you can choose to set just one filter, or use multiple filters in tandem with one another.

Filter by Location

Underneath the **Location Filter** tab, you can select specific Locations or **Temperature Categories** to do the Count in, you can specify Locations with particular **Tags**, you can choose Locations that have had particular Operations occur in them, and more. All can be used simultaneously, except you can only choose to filter by Locations OR Temperatures, not both.
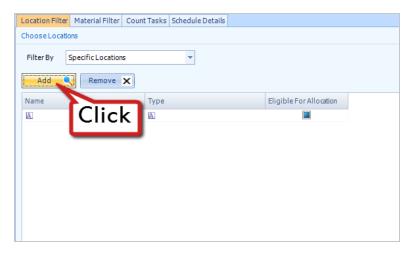
Filter by Specific Locations

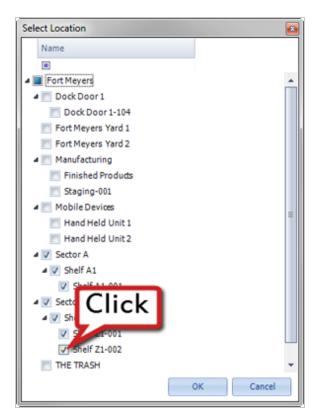1. Select **Specific Locations** from the **Filter By** drop-down list.
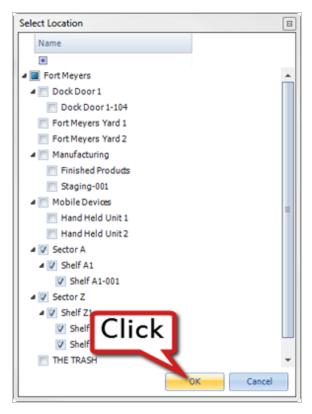

2. Click the **Add** button. A pop-up window will open.

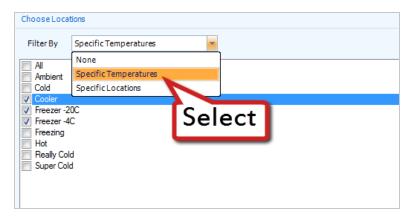3. Put a check mark in the box of each Location in which you'd like to perform the Count.

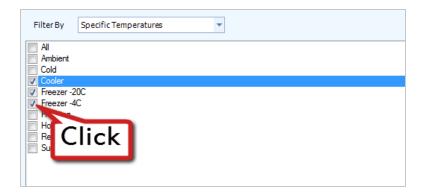4. Click the **OK** button.

Filter by Specific Temperatures

1. Select **Specific Temperatures** from the **Filter By** drop-down list.

2. Put a check mark in the boxes next to all the Temperature Categories you'd like to do the Count in.

> **⚠ Note**
>
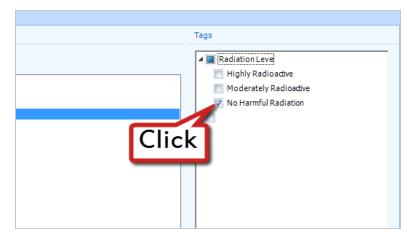> You will have to double-click the box - once to change the focus to the Category, and once again to add the check.

Filter by Tags

Put a check mark in the boxes next to all the Tags you'd like to do the Count for. Each Location that has been Tagged with what you've selected here will be included in the Count (see the Setting Up Tags tutorial, and the Warehouse Explorer guide to see where to add Tags to Locations).
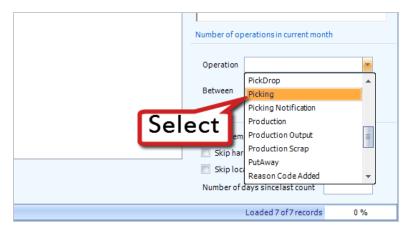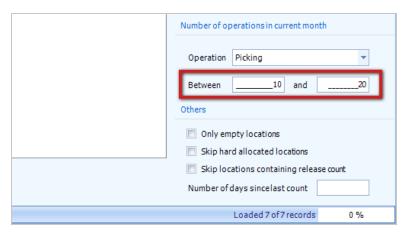

Filter by Operations

You can specify a particular Operation Type to have occurred in the Locations in which you would like the Physical Count performed. You are limited to specifying a range of occurrences over the current month.

1. Select an **Operation Code** from the drop-down list.

For a complete list of all the Operation Codes and what they are for, see the Operation Codes guide.

2. Set the Range of occurrences of the selected Operation . Enter a low and a high value.

ⓘ Example
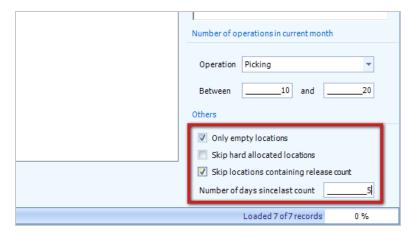
In the example shown above, the Count will apply to all Locations in which between 10 and 20 Pick Tasks have been completed this month.

Other Filters

You can also choose these final Location options:

- **Only empty Locations**: Do the Count in Locations that should not have Inventory in them according to the system, to make sure they are empty.
- **Skip hard allocated Locations**: Do not perform the Count in Locations that contain Materials set aside for an Order.
- **Skip Locations containing Release Count**: Do not perform the Count in Locations that already have a Physical Count Released for them.

- **Number of days since Last Count**: Enter a value here to do the Count in Locations that had a Count completed in them that many days ago or more.
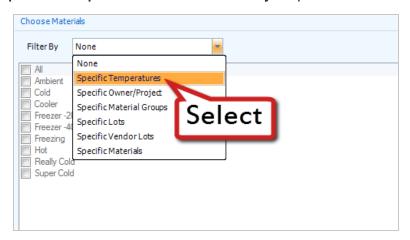

Filter by Materials

Underneath the Material Filter tab, you have a few options to filter the Count by, with additional Material Tag and other filter options.

You can only select one Material Filter for the Count, but you can include as many Tags or other filters as you'd like.
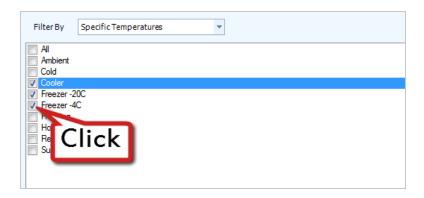
Filter by Specific Temperatures

1. Select **Specific Temperatures** from the **Filter By** drop-down list.

2. Put a check mark in the boxes next to all the Temperature Categories you'd like to do the Count in.
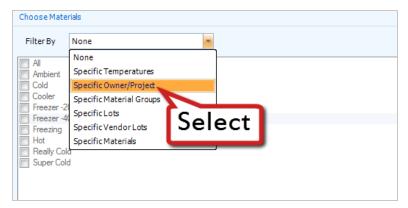
⚠️ **Note**

You will have to double-click the box - once to change the focus to the Category, and once again to add the check.
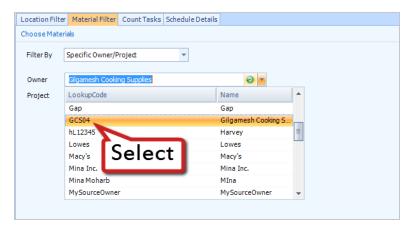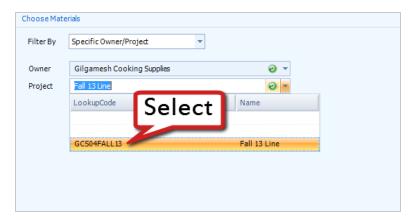

Filter by Specific Owner/Project

1. Select **Specific Owner/Project** from the **Filter By** drop-down list.

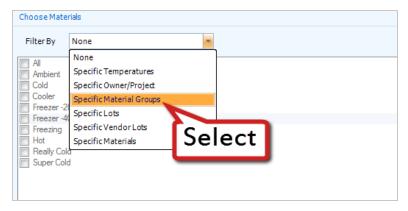2. Select the **Owner** you'd like the Count to apply to.

3. Select the **Project** you'd like the Count to apply to.
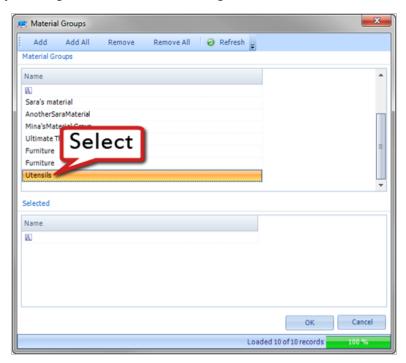

Filter by Specific Material Groups

1. Select **Specific Material Groups** from the **Filter By** drop-down list.
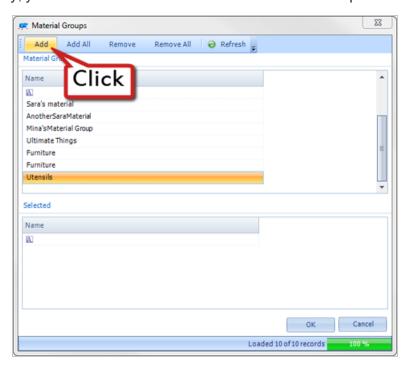

2. Click the **Add** button to open a pop-up window in which you can select Material Groups.

3. Select the Material Groups you'd like the Count to include. You can select more than one by holding **Shift** or **Ctrl** and clicking.
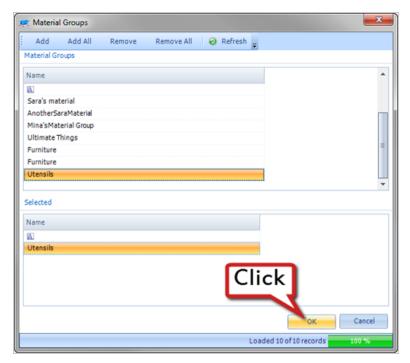

4. Click the **Add** button to add all the selected Material Groups to the list. Alternatively, you can click **Add All** to add all the available Groups to the list.
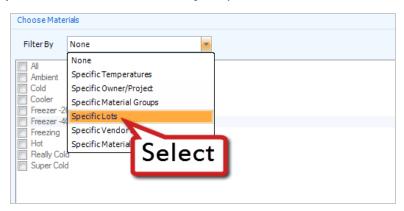

5. Click **Okay**.

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Filter by Specific Lots
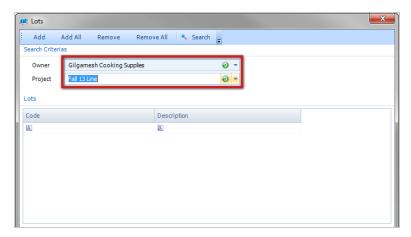
1. Select **Specific Lots** from the **Filter By** drop-down list.

2. Click the **Add** button to open a pop-up window in which you can select Lots.
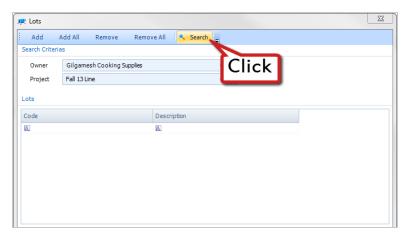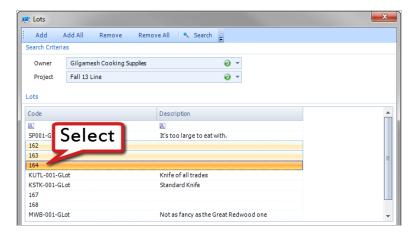
3. Specify an **Owner** and **Project** to look for Lots under, otherwise you can search all available Lots.
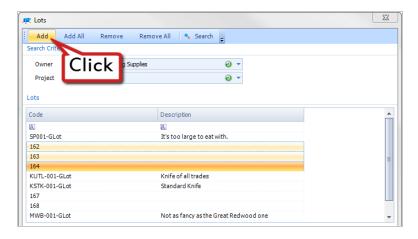

4. Click the **Search** button to populate a list of all relevant Lots.

5. Select the specific Lots you'd like to include in the Count. You can select more than one by holding **Shift** or **Ctrl** and clicking.
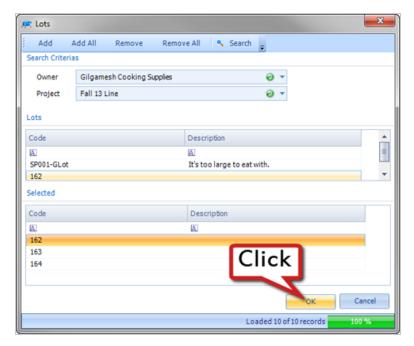

6. Click the **Add** button to add all the selected Lots to the list. Alternatively, you can click **Add All** to add all the available Lots to the list.

7. Click **Okay**.

Filter by Specific Vendor Lots

1. Select **Specific Vendor Lots** from the **Filter By** drop-down list.

2. Click the **Add** button to open a pop-up window in which you can select Vendor Lots.

3. Specify an **Owner** and **Project** to look for Vendor Lots under, otherwise you can search all available Vendor Lots.

4. Click the **Search** button to populate a list of all available Vendor Lots.

5. Select the specific Vendor Lots you'd like to include in the Count. You can select more than one by holding **Shift** or **Ctrl** and clicking.

6. Click the **Add** button to add all the selected Vendor Lots to the list. Alternatively, you can click **Add All** to add all the available Vendor Lots to the list.
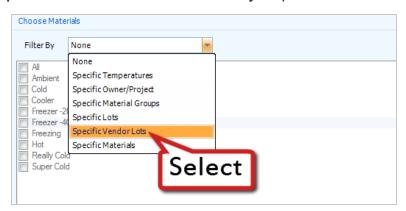

7. Click **Okay**.
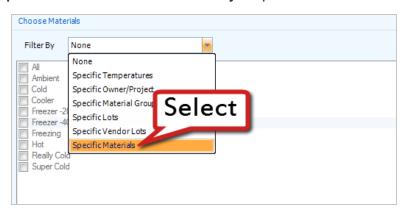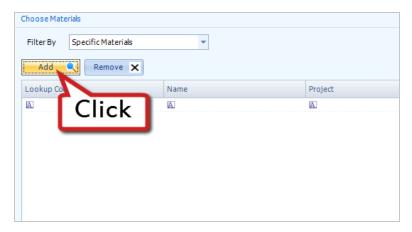
Filter by Specific Materials

1. Select **Specific Materials** from the **Filter By** drop-down list.
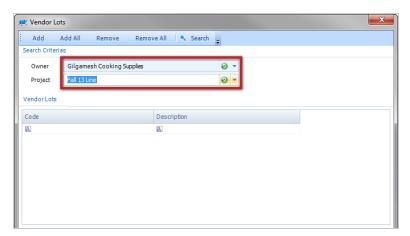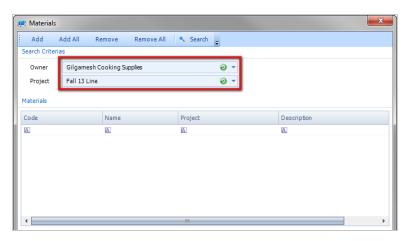

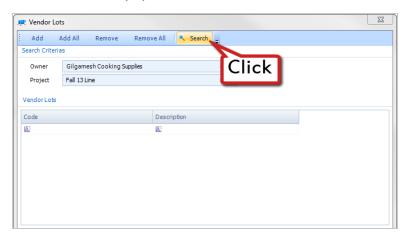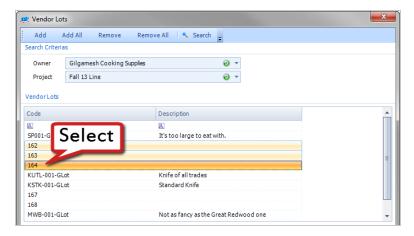2. Click the **Add** button to open a pop-up window in which you can select Materials.
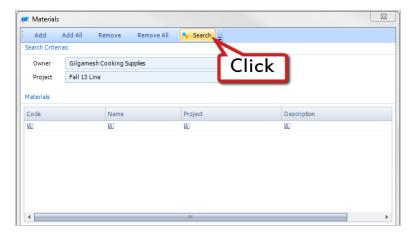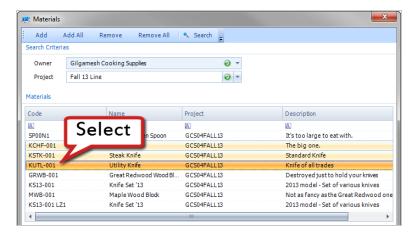
3. Specify an **Owner** and **Project** to look for Materials under, otherwise you can search all available Materials.
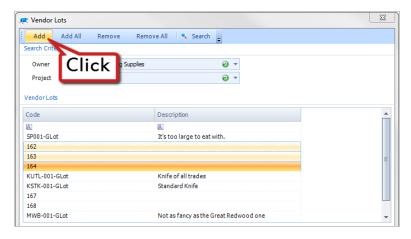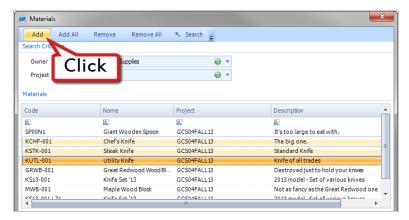

4. Click the **Search** button to populate a list of all available Materials.
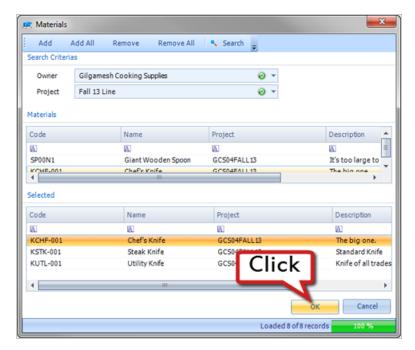
5. Select the specific Materials you'd like to include in the Count. You can select more than one by holding **Shift** or **Ctrl** and clicking.
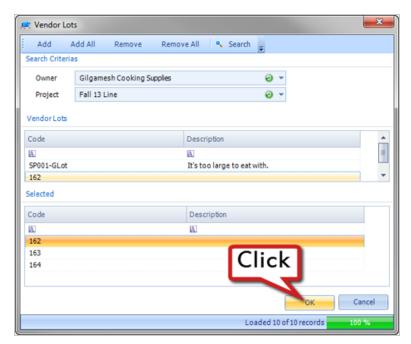

6. Click the **Add** button to add all the selected Materials to the list. Alternatively, you can click **Add All** to add all the available Materials to the list.
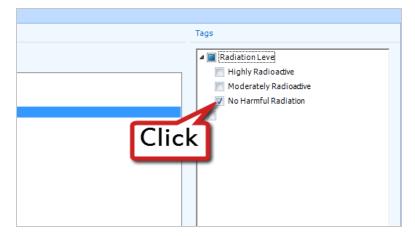

7. Click **Okay**.

Filter by Tags

Put a check mark in the boxes next to all the Tags you'd like to do the Count for.
Each Material that has been Tagged with what you've selected here will be
included in the Count (see the Setting Up Tags tutorial, and the Materials guide to
see where to add Tags to Materials).

Other Filters
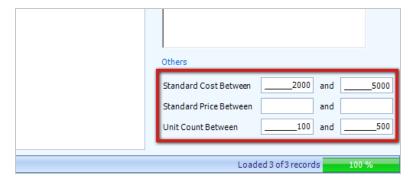
You can also choose these final Materials options:

- **Standard Cost Between**: Do the Count for Materials that cost between the
  two set Values.
- **Standard Price Between**: Do the Count for Materials whose price is
  between the two set Values.

- **Unit Count Between**: Do the Count for Materials of which you have the specified amount in your Inventory.

Step 3. Set a Schedule for the Count
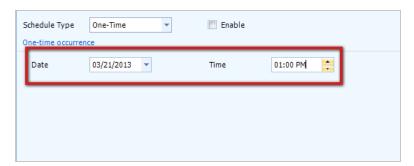
Under the **Schedule Details** tab, you can set your Physical Count to occur just once, or to recur by whatever specifications you would like.

One-Time Event

1. Select **One-Time** from the **Schedule Type** list.

2. Set the **Date** and **Time** you would like the Event to occur.
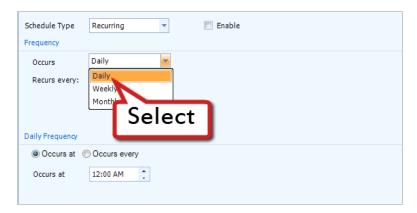
Recurring Count
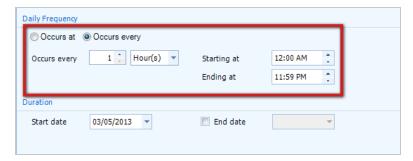
1. Select **Recurring** from the **Schedule Type** drop-down list.
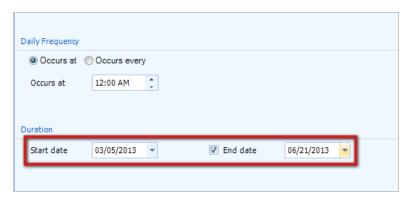
2. Select the **Frequency** that the Event will occur from the drop-down list.

- **Daily**: You can set the amount of days between each occurrence of the Event (recurs every 3 or 4 days, for example).
- **Weekly**: You can set the amount of weeks between each occurrence of the Event (recurs every 2 or 3 weeks, for example), and on which day(s) the Event should take place.
- **Monthly**: You can set which day of the month the Event will occur on, how many months between each instance of the Event (recurs every 1 or 2 months, for example), and whether to skip the count if the day does not occur in the month (Events scheduled for the 31st will not occur in April) or reschedule it to the last day of the month (Events scheduled for the 31st will occur on the 30th of April).

3. Set the **Daily Frequency** for the Event, to determine at what time of the day it will take place, or how often in its scheduled day it will occur.

4. Set the **Duration** for the recurring Event (over what period of time will the Event continue to recur). If you'd like the Event to continue indefinitely, do not set an **End Date**.

Step 4. Enable and Save the Physical Count

1. Under the **Schedule Details** tab, click the **Enable** box.

2. Click the **Save** button to save your Physical Count in the system. It will be Released to be completed according to the Schedule you have set for it.

Complete a Physical Count
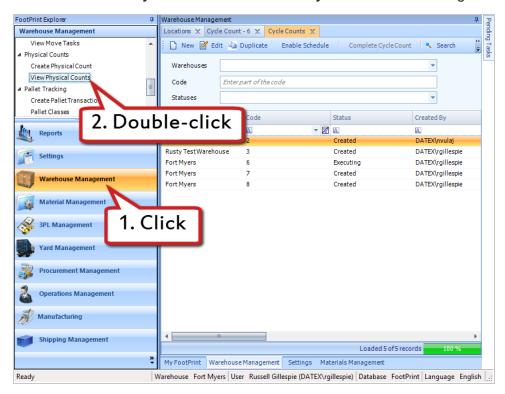
Completing a Physical Count allows you to review the Count, order Recounts or Resolutions to discrepancies, and close out the Count.

> ✅ **Prerequisites**
>
> - **Performed Physical Count**
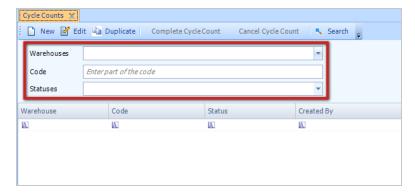
Step 1. Open the Physical Count

1. Click the **Warehouse Management** module in the FootPrint Explorer.

2. Double-click **View Physical Count** under the **Physical Counts** heading.

3. You can filter your Count search by **Warehouse**, **Code**, or **Status**, or you can leave these fields blank to search all Counts.

4. Click the **Search** button to populate a list of all applicable Counts.

5. Select your Count on the list, and double-click to open.

Step 2. Review Physical Count
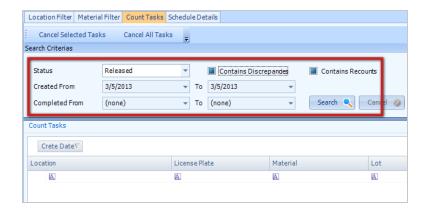
Under the **Count Tasks** tab, you can find all the Tasks relating to the Count.

1. Filter the Task search if necessary, by **Status**, **Created Dates**, **Completed Dates**, and whether or not you'd like to include **Discrepancies** or **Recounts** in your

results.

⚠ Note
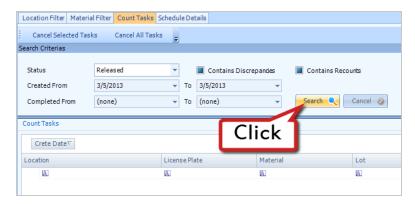
Make sure to select the appropriate Status, or select **All**.
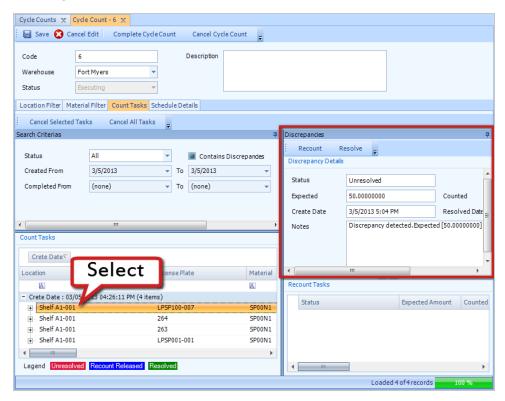
2. Click the **Search** button.
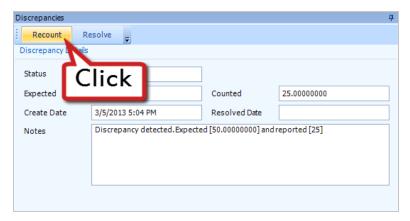
A list of all relevant Count Tasks will populate. Unresolved, Recount Released, and Resolved Tasks will all be highlighted.

3. By selecting a task, you can review any discrepancies on the right side of the screen.
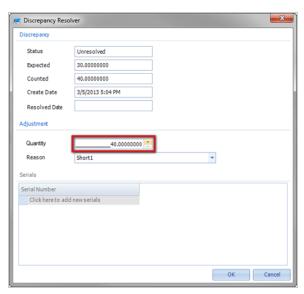
4. (Optional) Clicking **Recount** will re-release the Task, requiring the count be completed once more.

5. By clicking the **Resolve** button, you will open a pop-up window in which you can account for the discrepancy.
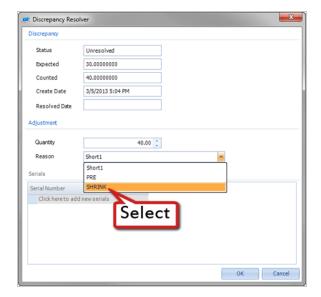
6. You can make any final adjustments to the count by changing the **Quantity**.
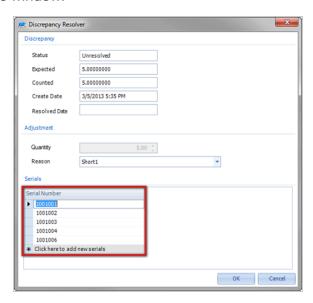
7. Select a **Reason Code** for the discrepancy.

⚠ Note
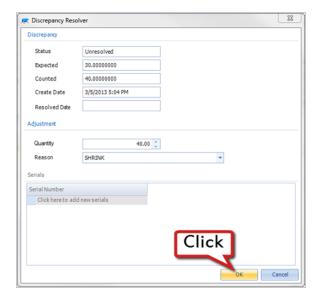
You must have at least one Reason Code set up to resolve the discrepancy. See: Setting Up Reason Codes.

8. If you need to enter or change any Serial Numbers, this can be done in the bottom area of the window.

9. Click the **OK** button to resolve the discrepancy and update any changes to your Inventory in the system.

The status of the Task will change to Resolved.

Step 3. Complete the Physical Count

Once all Tasks have been completed and you have reviewed the Physical Count, you are able to complete the Count, permanently closing it out.

> ### ⚠ Note
>
> If you have a Recurring Physical Count set up, completing it will end its schedule and stop it from creating new Tasks.

Click the **Complete Cycle Count** button near the top of the screen.

A pop-up window will ask to confirm that you want to complete the Count.

Perform a Physical Count
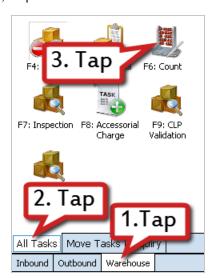
Physical Counts consist of an exhaustive tally of existing inventory, following the specifications outlined by the Count Tasks.

✅ Prerequisites

- **Warehouse**
- **Locations**
- **Materials**
- Inventory in your Warehouse
- **Released Physical Count**

Step 1. Open the Count section

1. Tap the **Warehouse** tab.

2. Tap the **All Tasks** tab.

3. Tap the **Count** section, or press **F6**.
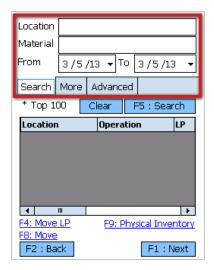
Step 2. Search for Physical Count Tasks

There are several different options for finding the available Count Tasks. The search area is divided into three separate tabs, into which you can scan or enter a variety of information.
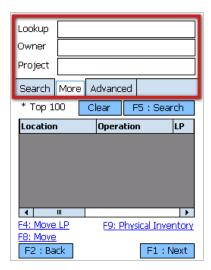
Search Tab

Search by **Location**, **Material**, or **Release Dates** (by setting a range of available dates).
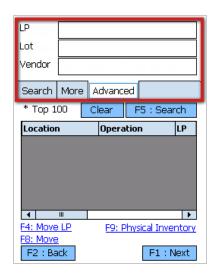
More Tab

Search by the **Count LookUp Code**, associated **Owner**, or associated **Project**.
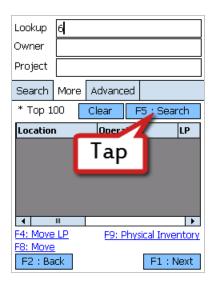
Advanced Tab

Search by **License Plate**, **Lot**, or **Vendor**.
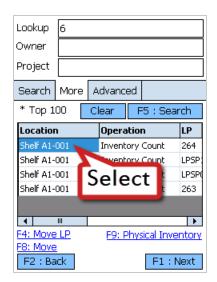
Once you've entered the information you want to search by, tap **Search** or press **F5**. You can also leave all the fields blank to search for all available Tasks.
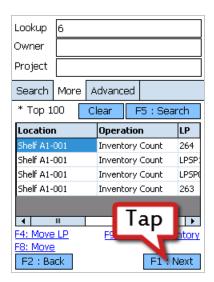
The system will load the top 100 relevant Count Tasks.

Step 3. Complete Count

1. Select the Count you'd like to complete.

2. Tap **Next** or press **F1**.

At this point, you will physically count how many of the specified Material is present. Make sure the Inventory you are counting matches the entire description on the screen.

Depending on whether the Material you are counting is an ordinary Fixed Weight Material, or a Variable Weight or Serial Controlled Material, you will see a different screen.

Fixed Weight, Non-Serial Controlled Count

3. Once you've finished counting, enter the total **Quantity**.
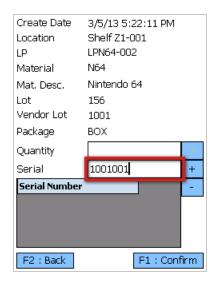
4. Tap **Confirm** or press **F1**.
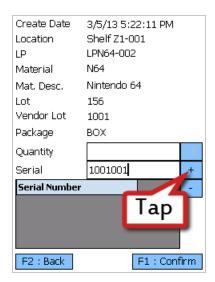
Variable Weight or Serial Controlled Count

3. You will have to scan or enter each **Serial Number** that is present.
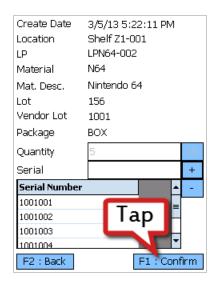
4. Tap the **+** button to add the Serial Number.
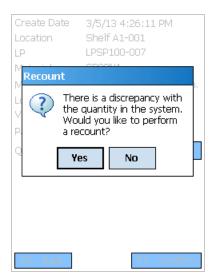
Continue this way, adding each Serial Number, until you've entered them all. If you enter an incorrect Serial Number, you can select it and tap the **-** button to remove it.

5. Tap **Confirm** or press **F1**.

If there is a discrepancy between the Count and the expected Quantity, a pop-up message will inform you, and allow you to do a recount.

The system will make note of all discrepancies.

Repeat the process for each remaining Count Task.

Create a Load Container
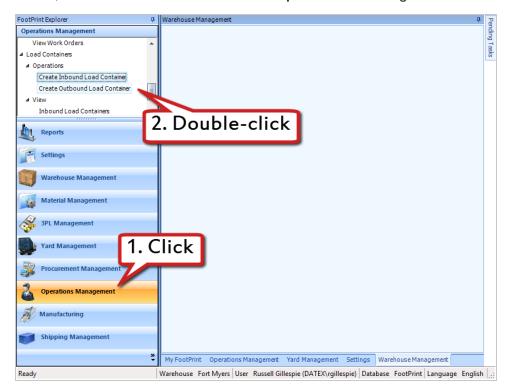
Load Containers group Shipments of incoming or outgoing Materials together. This allows you to not only prioritize your Shipments, but also give direction to how Materials should be Loaded.

✅ Prerequisites

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

Step 1. Create a new Load Container
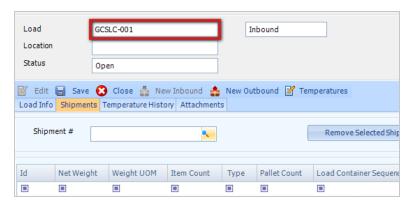
1. Click the **Operations Management** module.

2. Double-click either **Create Inbound Load Container** or **Create Outbound Load Container**, under the **Load Containers** and **Operations** headings.
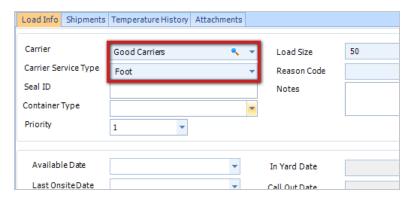
A new Load Container will automatically be created.

Step 2. Fill out Basic Load Container Information
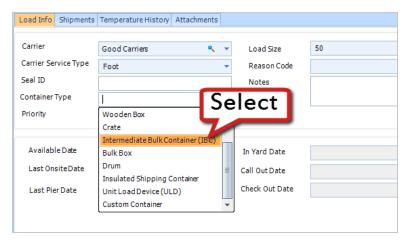
1. Enter a name or number for your Load Container in the **Load** field. The system will provide it with a LookUp number if you do not give it one.
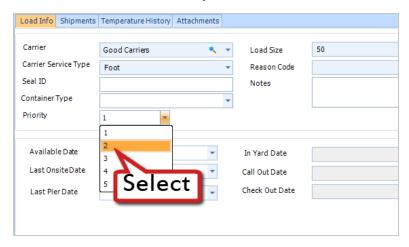
2. Specify a **Carrier** and **Carrier Service Type** for the Container.
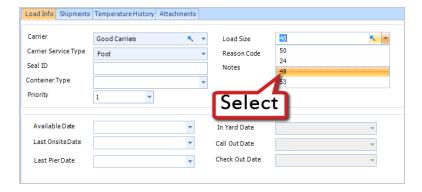
3. Select the **Container Type** this Load will be in.

4. Set a **Priority** for this specific Load Container. It will appear highlighted in that Priority's color in the Load Container list, and the Load Containers should ideally be Loaded or Received in order of Priority.

5. Select a **Load Size** for the Load Container.
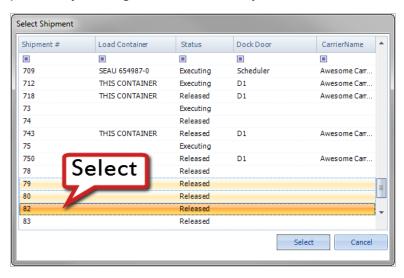
Step 3. Select Shipments to add to Load Container

If you are creating a Load Container during the creation of a Shipment, the current Shipment will automatically be added to the Container, so it is not necessary to add it here.
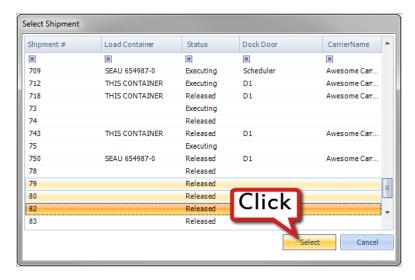
1. Click the **magnifying glass icon** to open a Select Shipment pop-up window.

2. Select the Shipment you would like to add to the Container. You can select multiple Shipments by holding **Ctrl** or **Shift** while you click.

3. Click the **Select** button.
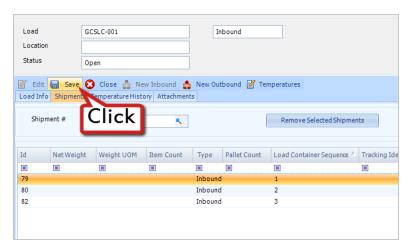
Each Shipment is added to the Load Container in the order you selected them. This creates a sequence of Shipments within the Container. You can continue adding Shipments, and each subsequent Shipment you add to the Container will be placed at the end of the sequence.

This sequence refers to the order in which the Shipments should be Loaded or Received (each number in the sequence will correspond with a stop in the delivery, so for Inbound Shipments the first in the sequence will have been the last stop of the delivery, and for Outbound Shipments the first in the sequence will be the last stop of the delivery).

Step 4. Save Load Container

Click the **Save** button to save the Load Container, readying it to arrive at your Warehouse.

Create a Pallet Transaction
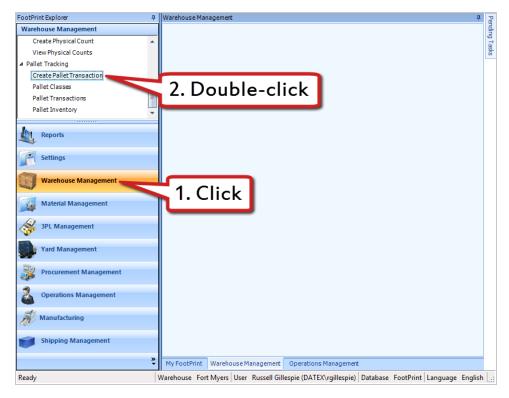
Pallets can be tracked in FootPrint through Pallet Transactions. Adding a Transaction will adjust the total number of Pallets you have recorded in the system, which is kept as a running total for each Pallet Class you have set up, and is tied to your instance of FootPrint.

✔ Prerequisites

- Owner
- Project
- Pallet Classes

Step 1. Create a new Pallet Transaction

1. Click the **Warehouse Management** module in the FootPrint Explorer.

2. Double-click **Create Pallet Transaction**, under the **Pallet Tracking** heading.

A pop-up window will open.

Step 2. Fill out Pallet Transaction
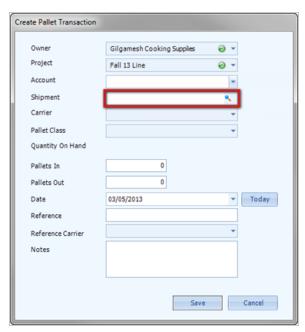
1. Enter an **Owner** for the Transaction.
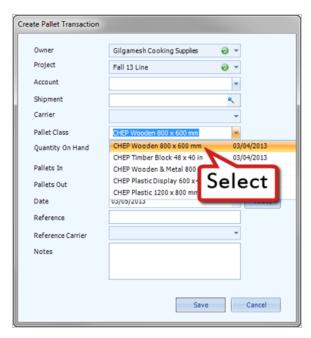
2. Select a **Project** for the Transaction.

3. **(Optional)** You can associate the Pallet Transaction with an existing Shipment.

You can directly enter the **Shipment ID**, or click the **magnifying glass icon** and search for the Shipment on a list in a separate pop-up window.
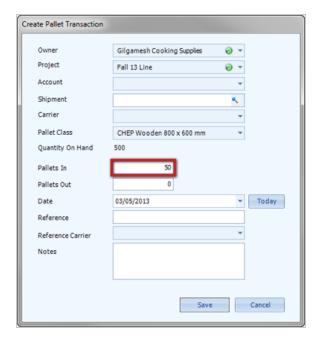
4. Select the **Pallet Class** the Transaction is for.
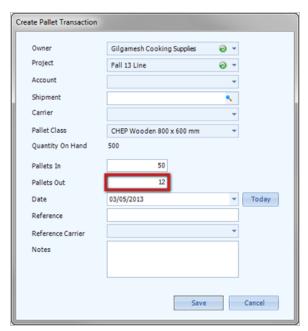
5. Enter the number of Pallets coming in to your Warehouse in this Transaction.

6. Enter the number of Pallets leaving your Warehouse in this Transaction.

7. Click the **Save** button.

Add Inventory to a Location
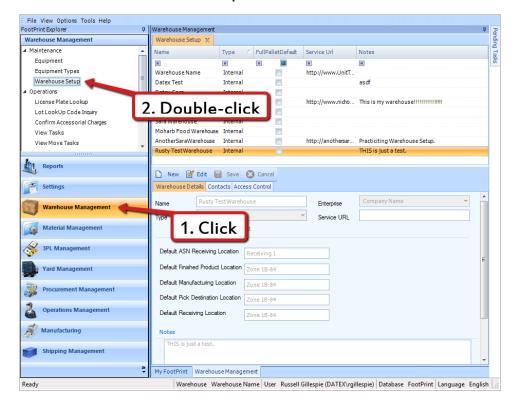
You are able to manually add Materials to your Locations directly from the Locations section.

> ✅ **Prerequisites**
>
> - **Warehouse**
> - **Locations**
> - **Owner**
> - **Project**
> - **Material**
> - **Reason Code**

Step 1. Open the Warehouse Setup section

1. Click the **Warehouse Management** module in the FootPrint Explorer.

2. Double-click the **Warehouse Setup** section.

Step 2. Open the Warehouse Explorer

1. Select the Warehouse you want to edit.

2. Click the **View Warehouse Layout** button.

Alternatively, if the Warehouse is set as your Default Warehouse, you can click **Warehouse Explorer** from the **View** section of the Main Menu, or press **Alt+W**.

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Step 3. Add Inventory

1. Right-click the **Location** you'd like to add Inventory to.

2. Click **Add Inventory**.

A pop-up box will open, in which you can create the Inventory.

Step 4. Enter Basic Information

1. Select the **Owner** of the Materials you are adding.

2. Select the **Project** the Materials will belong to.

Step 5. Add Materials
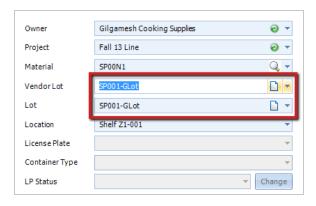
1. You can click the drop-down arrow next to the **Material** field, and select the Material you'd like to add from the list.

You can also click the **magnifying glass icon** to open a pop-up window, from which you can create a new Material if you need.
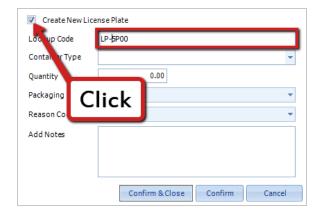
2. By clicking the **page icon** in the **Lot** or **Vendor Lot** fields, the system will open a window and create a Lot and Vendor Lot for you. You can rename these if you want. Clicking **OK** confirms the Lot or Vendor Lot creation. You can also choose an existing Lot in the system rather than creating a new one, by clicking the drop-down arrow and selecting from the list.

If your Material is not Lot controlled, the system will assign the Generic Lot here for you automatically when you click the fields.
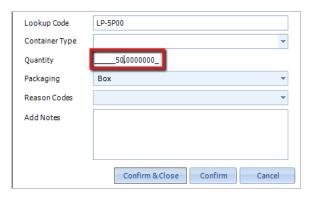
3. If there are **License Plates** already assigned to the Location, you can select one from the drop-down list, or you can create an entirely new License Plate. Click the **Create New License Plate** box, then enter the License Plate ID.
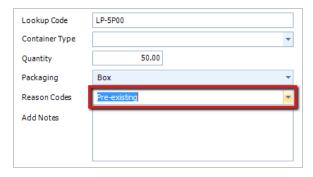
4. Enter the **Quantity** of the Material you are adding.

5. Select the **Packaging** for the Material you are adding.
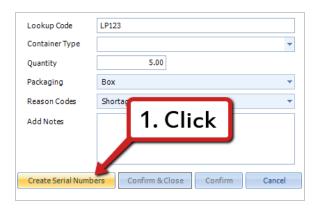
6. Enter a **Reason Code** for the Inventory addition.
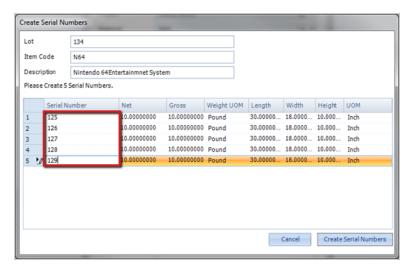
Step 6. Create Serial Numbers if Necessary

If your added Material requires Serial Numbers, you will have to create those before you can add the inventory.
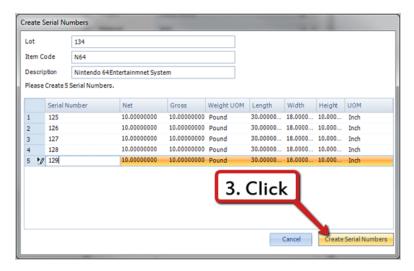
1. Click **Create Serial Numbers**.

2. A pop-up window will open. Type in each individual Serial Number in the **Serial Number** fields.

3. Click the **Create Serial Numbers** button to confirm.

Step 7. Confirm Inventory and Close

Click the **Confirm & Close** button if you are done adding Inventory to this Location.

If you want to add more Materials, click **Confirm**, then repeat these steps from the beginning.

Add Inventory

You are able to manually add Materials to your Locations directly from the Mobile Device.

⚠ Note
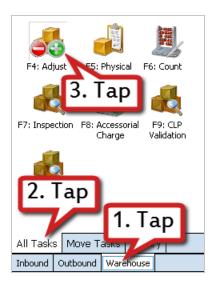
The User adding inventory will need to have their Adjustment Values set high enough to allow for the inventory added here.

✓ Prerequisites

- Warehouse
- Locations
- Owner
- Project
- Materials
- Reason Code

Step 1. Open Adjust Inventory section

1. Tap the **Warehouse** tab.

2. Tap the **All Tasks** tab.

3. Tap **Adjust** or press **F4**.
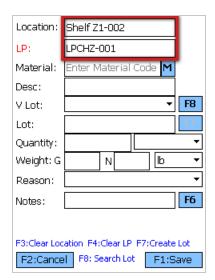
Step 2. Add Inventory
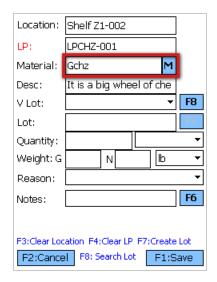
1. Press **F4** to Add Inventory.
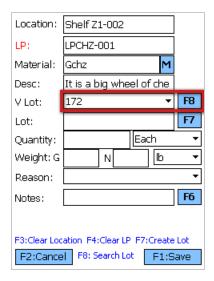
2. Enter a **Location** and **License Plate** .

3. Enter a **Material** LookUp Code.
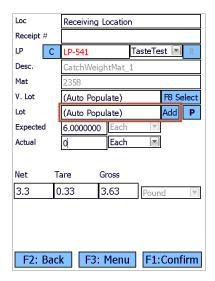
4. If your Material is Lot controlled, scan or enter the **Vendor Lot** number, or tap press **F8** to choose from a list of existing Vendor Lots.

Create a new Lot if necessary

1. Tap **Add** to create a new Lot and Vendor Lot.

2. Ensure that the **New** box is selected.

3. You can enter a new **Vendor Lot ID**, or leave it blank to let the system create one.

Project: Store A
Name: Exercise Drink_11
Lookup Code: 1999
Exercise Drink_11 desc.

Vendor Lot
☑ New   [   ]

Manufacturing Date   10/ 9 /17
Expiration Date   10/ 9 /19

VAT   [   ]
Notes   [   ]
Lot #   (Auto Populate)
Lot Status   Active

F2: Cancel   F1: Save

4. Enter the **Manufacturing** and **Expiration Dates**.

Project: Store A
Name: Exercise Drink_11
Lookup Code: 1999
Exercise Drink_11 desc.

Vendor Lot
☑ New   [   ]

Manufacturing Date   10/ 9 /17
Expiration Date   10/ 9 /19

VAT   [   ]
Notes   [   ]
Lot #   (Auto Populate)
Lot Status   Active

F2: Cancel   F1: Save

5. You can enter a new **Lot ID**, or leave it blank to let the system create one.

Project: Store A
Name: Exercise Drink_11
Lookup Code: 1999
Exercise Drink_11 desc.

Vendor Lot
☑ New

Manufacturing Date   10/ 9 /17
Expiration Date   10/ 9 /19

VAT

Notes

Lot #   (Auto Populate)

Lot Status   Active

F2: Cancel   F1: Save

6. Tap **Save** or press **F1**.

Project: Store A
Name: Exercise Drink_11
Lookup Code: 1999
Exercise Drink_11 desc.

Vendor Lot
☑ New

Manufacturing Date   10/ 9 /17
Expiration Date   10/ 9 /19

VAT

Notes

Lot #   (Auto Populate)

Lot Status   Active
                              Tap

F2: Cancel   F1: Save

6. Enter the **Quantity** of Materials being added to your Warehouse.
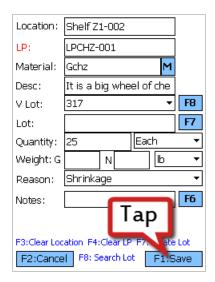
7. Enter the **Net Weight** and **Gross Weight** of the Materials being added, if necessary.
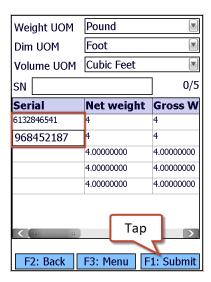
8. Select a **Reason Code** from the drop-down list.

9. Tap **Save** or press **F1**.

10. If your Material is Serial Controlled, you will also need to create Serial Numbers for the Shipment. A screen will open for you to do so. Enter them, then tap **Submit** or press **F1**.

Weight UOM	Pound ▼
Dim UOM	Foot ▼
Volume UOM	Cubic Feet ▼

SN [   ]   0/5

Serial	Net weight	Gross W
6132846541	4	4
968452187	4	4
	4.00000000	4.00000000
	4.00000000	4.00000000
	4.00000000	4.00000000

Tap

| F2: Back | F3: Menu | F1: Submit |

Adjust Inventory in a Location

If some of your Inventory totals change (in the event of shrinkage or spoilage, for example), you can Adjust the Inventory from the Location the Materials are stored in.
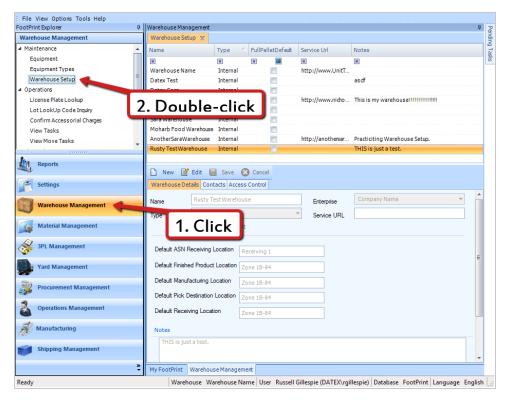
⚠ Note

The User making the Adjustment will need to be have their Adjustment Values set high enough to allow for the Adjustment being made here.

✔ Prerequisites

- Warehouse
- Locations
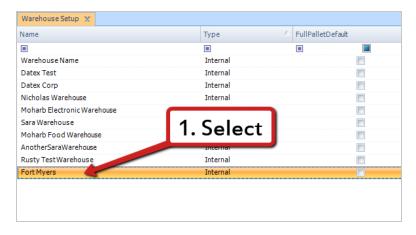- Materials
- Reason Code
- Inventory in your Warehouse

Step 1. Open the Warehouse Setup section

1. Click the **Warehouse Management** module in the FootPrint Explorer.

2. Double-click the **Warehouse Setup** section.

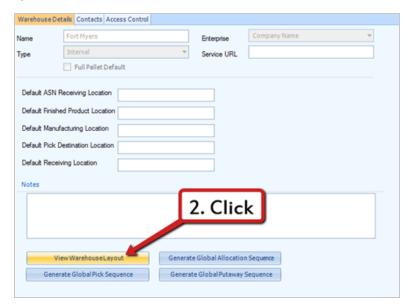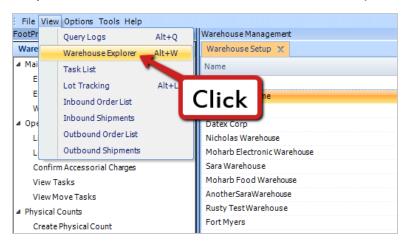## Step 2. Open the Warehouse Explorer

1. Select the Warehouse you want to edit.
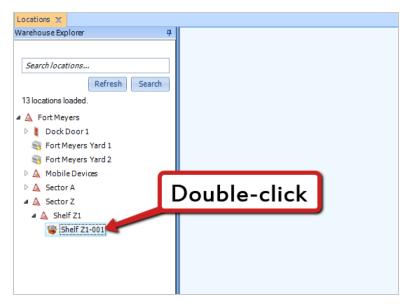

2. Click the **View Warehouse Layout** button.

Alternatively, if the Warehouse is set as your Default Warehouse, you can click **Warehouse Explorer** from the **View** section of the Main Menu, or press **Alt+W**.

Step 3. Open the Location

Double-click the **Location** you want to open from the Warehouse Explorer pane.

Step 4. Adjust the Inventory

Your Inventory Adjustment will be done to the License Plate.
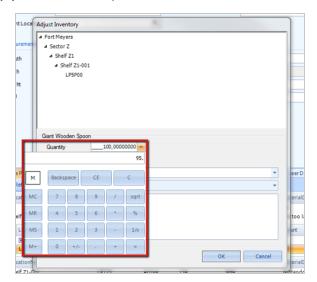
1. Click the **+** box next to the License Plate you would like to adjust Inventory for.
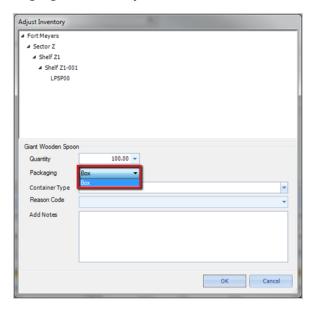
2. A drop-down list of all the Materials on the License Plate will appear. Double-click the Material you'd like to Adjust.

3. A pop-up window will open. You can type in the adjusted **Quantity**, or clicking the drop-down arrow will open a soft keypad to enter or calculate the number (click the **equals sign (=)** when finished).

4. Change the **Packaging** if necessary.

5. Select a **Reason Code** from the drop-down list.

6. Click **OK**.

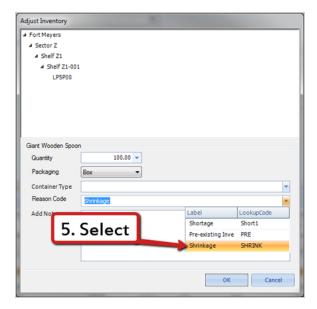# Make an Inventory Adjustment

If some of your Inventory totals change, in the event of shrinkage or spoilage, for example, you can Adjust the Inventory from the Mobile Device.

⚠ Note
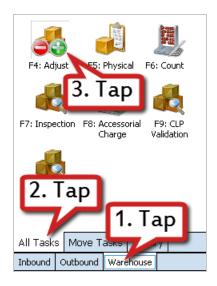
The User making the Adjustment will need to have their Adjustment Values set high enough to allow for the Adjustment being made here.

✅ Prerequisites

- Warehouse
- Locations
- Materials
- Inventory in your Warehouse
- Reason Code
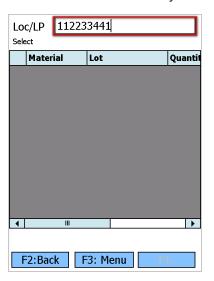
Step 1. Open Adjust Inventory section

1. Tap the **Warehouse** tab.

2. Tap the **All Tasks** tab.

3. Tap **Adjust** or press **F4**.
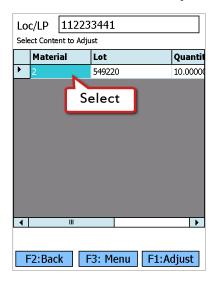
Step 2. Select Inventory to Adjust
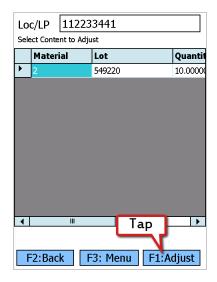
1. You must search by **License Plate** LookUp. Enter or scan the LookUp, and press Enter if the information does not automatically load.

2. Select the Inventory you would like to make an Adjustment to.
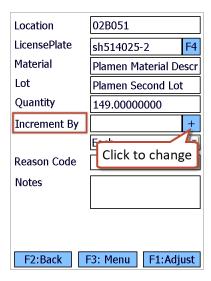
3. Tap **Adjust** or press **F1**.
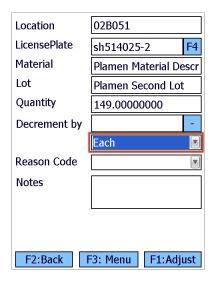
Step 3. Adjust Inventory
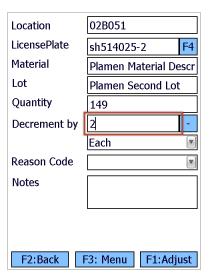
1. Make sure you are adding or subtracting Inventory:

- To add Inventory, the field should be labeled **Increment By**.
- To subtract Inventory, tap the **+ button** to change the field to **Decrement By**.

2. Make sure you have the correct **Packaging** selected.

Location	02B051	
LicensePlate	sh514025-2	F4
Material	Plamen Material Descr	
Lot	Plamen Second Lot	
Quantity	149.00000000	
Decrement by		-
	Each	▼
Reason Code		▼
Notes		

F2:Back	F3: Menu	F1:Adjust
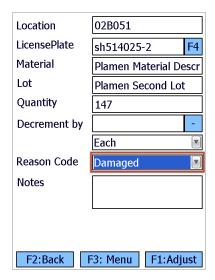
3. Enter the amount you would like to **Increment By** or **Decrement By**. When tabbing out of this field, the Quantity will automatically be increased or decreased by this amount.

Location	02B051	
LicensePlate	sh514025-2	F4
Material	Plamen Material Descr	
Lot	Plamen Second Lot	
Quantity	149	
Decrement by	2	-
	Each	▼
Reason Code		▼
Notes		

F2:Back	F3: Menu	F1:Adjust

4. Select a **Reason Code** for the Adjustment.

Location	02B051	
LicensePlate	sh514025-2	F4
Material	Plamen Material Descr	
Lot	Plamen Second Lot	
Quantity	147	
Decrement by		-
	Each ▼	
Reason Code	Damaged ▼	
Notes		

| F2:Back | F3: Menu | F1:Adjust |

5. Tap **Adjust** or press **F1**.

Location	02B051	
LicensePlate	sh514025-2	F4
Material	Plamen Material Descr	
Lot	Plamen Second Lot	
Quantity	147	
Decrement by		-
	Each ▼	
Reason Code	Damaged ▼	
Notes		

Tap

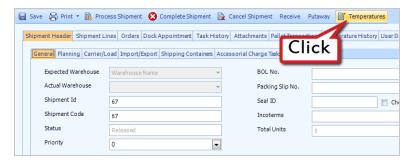| F2:Back | F3: Menu | F1:Adjust |

Capture Temperature

Temperature Capture allows you to record the Temperatures you take in FootPrint, tying them to the Shipment, License Plate, Materials, etc. These recorded Temperatures can be accessed under **Temperature History** tabs.

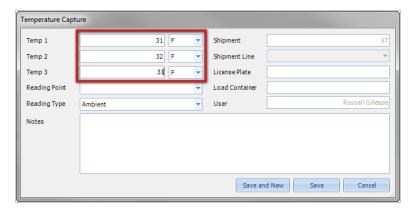### ✔ Prerequisites

- **Reading Points**
- **Reading Types**

Step 1. Create a new Temperature Capture
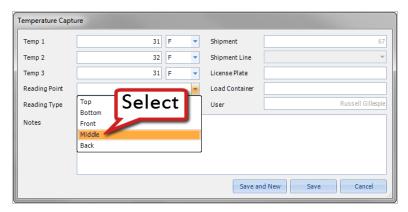
1. Click the **Temperatures** button.

A pop-up window will open, in which you can fill out the Temperature Capture information.
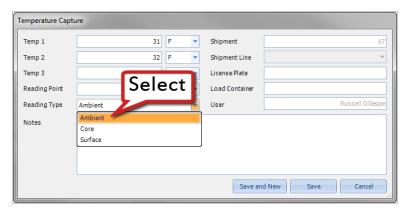
2. Enter the **Temperature Readings**. You are able to add three separate Readings per Capture. Make sure you've selected the appropriate measurement (Fahrenheit or Celsius).
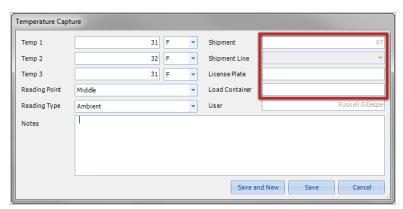
3. Select the **Reading Point** from which you are taking the Temperatures.

4. Select the **Type of Reading** you are taking.

5. (Optional) Enter any additional information for the Capture. This will tie the Capture to whatever specifics you set here. Fields may already be filled out, depending on where you are creating the Capture.

6. Click the **Save** button to save your new Capture, or click **Save and New** to save this Capture and create a new one (if you'd like to do a Reading from a different Point, for instance).