



Engineered for Easy™

[www.datexcorp.com](http://www.datexcorp.com)

# Datex Footprint WMS Materials Guide

Generated 5/30/2025

# Table of Contents

---

<b>Table of Contents .....</b>	<b>2</b>
<b>Materials Guide .....</b>	<b>3</b>
<b>Create a Packaging .....</b>	<b>32</b>
<b>Create a Material .....</b>	<b>36</b>
<b>Import Materials .....</b>	<b>56</b>
<b>Copy a Material .....</b>	<b>65</b>
<b>Set Up a Material .....</b>	<b>73</b>
<b>Create a Material Catalog .....</b>	<b>127</b>
<b>Add Comments .....</b>	<b>141</b>
<b>Print Files .....</b>	<b>144</b>

# Materials Guide

---

## Sections

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

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

## Overview

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

## Materials Hub

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

The screenshot shows the Materials hub interface. At the top, there are navigation icons for 'New material', 'Import materials', 'Copy materials', 'Packages', and 'Material catalogs'. Below these is a search bar and a 'Filters' section with dropdowns for 'Owner' (set to 'WonkaCorp') and 'Project'. A large 'Total materials' box displays the number '16'. The main area is titled 'Materials hub' with the sub-instruction 'Configure materials and their packaging.' Below this is a 'Custom fields' section. The 'Materials' tab is selected, showing a list of 16 items. The columns in the list include: Material (checkbox), Owner, Project, Source catalog, Total primary pick count, Total primary pick sum, Total non primary pick sum, Lot controlled, Serial controlled, and Fixed weight. The list contains four items: Almonds, Buttermilk, Caramel, and Chocolate Caramel Turtle, all from WonkaChocolates.

Material	Owner	Project	Source catalog	Total primary pick count	Total primary pick sum	Total non primary pick sum	Lot controlled	Serial controlled	Fixed weight
Almonds	WonkaCorp	Wonka Chocolates		2	10	63	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Buttermilk	WonkaCorp	Wonka Chocolates		1	5	38256.5	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Caramel	WonkaCorp	Wonka Chocolates		0	0	6091	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Chocolate Caramel Turtle	WonkaCorp	Wonka Chocolates		2	2272.0000001	14134.80246122	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

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

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

## Materials Hub Tabs

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

### Materials

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

### Materials Tab Details

- Material:** The name of the Material.
- Owner:** The Owner associated with this Material.
- Project:** The Project under which this Material is classified.
- Source** The Source Catalog from which the Material is being pulled.

**Catalog:**

**Total Primary Pick Count:** The Total Primary Pick Count for the Material.

**Total Primary Pick Sum:**

The Total Primary Pick Sum for the Material.

**Total Non-Primary Pick Sum:**

The Total Non-Primary Pick Sum for the Material.

**Lot Controlled:**

Indicates whether or not the Material is Lot Tracked, or Controlled.

**Serial Controlled:**

Indicates whether or not the Material is Serial Tracked, or Controlled.

**Fixed Weight:**

Indicates whether or not the Material Weight is always fixed.

**Fixed Volume:**

Indicates whether or not the Material Volume is always fixed.

**Fixed Dimensions:**

Indicates whether or not the Material Dimensions are always fixed.

**Description:**

A short description of what the Material is.

**Materials Tab Toolbar**

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

**Material Packagings**

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

Materials hub											
Materials		Materials packagings									
		30 items									
Material	Owner	Project	Source catalog	Packaging	Sub-packaging	Sub-packaging quantity	Default	Decimal precision	UPC	Length	V
Almonds	WonkaCorp	Wonka Chocolates	LB	0						0	C
Almonds	WonkaCorp	Wonka Chocolates	CA	LB	40					12	6
Buttermilk	WonkaCorp	Wonka Chocolates	LB	0			<input checked="" type="checkbox"/>			0	C
Buttermilk	WonkaCorp	Wonka Chocolates	GAL	LB	9					0	C
Caramel	WonkaCorp	Wonka Chocolates	LB	0						1	C

**Material Packagings Tab Details**

<b>Material:</b>	The name of the Material.
<b>Owner:</b>	The Owner associated with this Material.
<b>Project:</b>	The Project under which this Material is classified.
<b>Source Catalog:</b>	The Source Catalog from which the Material is being pulled.
<b>Packaging:</b>	The Packaging Type of the Material.
<b>Sub-Packaging:</b>	The Sub-Packaging Type of the Material.
<b>Sub-Packaging</b>	The quantity of the Material with that Sub-Packaging.
<b>Quantity:</b>	
<b>Default:</b>	When enabled, this Package level will be the default level for the Material. May be tied to Billing.
<b>Decimal Precision:</b>	Allows the Package to be split into fractions. The <b>No Decimals</b> setting does not allow splitting, requiring each Package to be whole; each subsequent setting ( <b>1 Decimal Place</b> , <b>2 Decimal Places</b> , etc.), allow division up to the specified decimal place. For example, the Package "Gallon" with the setting of <b>3 Decimal Places</b> could have an inventory of 3.672 Gallons.
<b>UPC:</b>	Universal Product Code, unique to each level of Packaging.
<b>Length:</b>	Length of Material. Only required when the Fixed Dimensions toggle is in use.
<b>Width:</b>	Width of Material. Only required when the Fixed Dimensions toggle is in use.
<b>Height:</b>	Height of Material. Only required when the Fixed Dimensions toggle is in use.
<b>L x W x H Measure:</b>	Unit of measurement for distance. Options include meter, centimeter, foot, and inch. Only required when the Fixed Dimensions toggle is in use.
<b>Weight:</b>	Weight of the items in this Package. Only required when the Fixed Weight toggle is in use.
<b>Shipping Weight:</b>	Weight of the items in this Package, combined with the weight of the Package itself (Tare Weight). Only required when the Fixed Weight toggle is in use.
<b>Weight Measure:</b>	Unit of measurement for weight. Options include kilogram, gram, pound, ounce, ton, troy ounce, and metric ton. Only required when the Fixed Weight toggle is in use.
<b>Volume:</b>	The Volume of the Package. Footprint automatically computes a volume based on the length width and height, which is displayed underneath those measurements. Only required when the Fixed Volume toggle is in use.
<b>Shipping Volume:</b>	Volume of the Package considering any other factors that may impact the Package before Shipping. Only required when the Fixed Volume toggle is in use.

<b>Volume Measure:</b>	Unit of measurement for volume. Options include cubic meter, cubic centimeter, cubic foot, and cubic inch. Only required when the Fixed Volume toggle is in use.
<b>Pallet High:</b>	The number of this Material Packaging that can be stacked atop each other on a Pallet.
<b>Pallet Tie:</b>	The number of this Material Packaging to be placed on the first level of the Pallet before you begin stacking atop them.
<b>Shippable Container:</b>	When enabled, this Packaging can be used as an actual Shipping Container, and does not need to be packed further.
<b>Autogenerate Serials:</b>	When enabled, Serial Numbers will be automatically generated with a sequential Serial Number when prompted for this Packaging level.
<b>Stack Group:</b>	A field for entering a group name for this item when Stacked. Used for Cartonization process.

## Material Record

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

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

## Material Record Details

In addition to the Material's Name, Status, and Description displayed here, there is more information entered when creating a new Material.

## Material Creation Details

Details that can be entered when [creating a new Material](#) are described in the table below. There are additional details that can only be managed when viewing a Material's [Edit window](#).

### Basic Information

<b>Code:</b>	A short code to identify the Material by, unique to the Project. If using Barcodes, the Material's Barcode would go here.
<b>Name:</b>	The name of the Material.
<b>Description:</b>	A short description of what the Material is.
<b>Owner:</b>	The Owner associated with this Material.
<b>Project:</b>	The Project under which this Material is classified.
<b>Packaging:</b>	The Packaging for the Material being created.
<b>UPC Code:</b>	Universal Product Code, unique to each level of Packaging. Multiple UPC Codes can be entered here, each separated by a comma.
<b>Group:</b>	The Material Group associated with the Material. This will bring in Temperature Category Rules and User Defined Fields, if available. See the <a href="#">Material Groups</a> section for more information.

\*Those in red are required fields.

### Configuration

<b>Allocation Strategy:</b>	This controls how Footprint decides which active <a href="#">Allocation Strategy</a> the Material will use. (check that link to see if there are details to be added).
-----------------------------	--

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

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

**Tracking:**

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

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

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

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

## Measurements

<b>Fixed Weight:</b>	Indicates whether or not the Material Weight is always fixed.
<b>Weight:</b>	Weight of the items in this Package. Only required when the Fixed Weight toggle is in use.
<b>Shipping Weight:</b>	Weight of the items in this Package, combined with the weight of the Package itself (Tare Weight). Only required when the Fixed Weight toggle is in use.
<b>Weight Measure:</b>	Unit of measurement for weight. Options include kilogram, gram, pound, ounce, ton, troy ounce, and metric ton. Only required when the Fixed Weight toggle is in use.
<b>Fixed Volume:</b>	Indicates whether or not the Material Volume is always fixed.
<b>Volume:</b>	The Volume of the Package. Footprint automatically computes a volume based on the length width and height, which is displayed underneath those measurements. Only required when the Fixed Volume toggle is in use.
<b>Shipping Volume:</b>	Volume of the Package considering any other factors that may impact the Package before Shipping. Only required when the Fixed Volume toggle is in use.
<b>Volume Measure:</b>	Unit of measurement for volume. Options include cubic meter, cubic centimeter, cubic foot, and cubic inch. Only required when the Fixed Volume toggle is in use.
<b>Fixed Dimensions:</b>	Indicates whether or not the Material Dimensions are always fixed.
<b>Length:</b>	Length of Material. Only required when the Fixed Dimensions toggle is in use.
<b>Width:</b>	Width of Material. Only required when the Fixed Dimensions toggle is in use.
<b>Height:</b>	Height of Material. Only required when the Fixed Dimensions toggle is in use.
<b>L x W x H Measure:</b>	Unit of measurement for distance. Options include meter, centimeter, foot, and inch. Only required when the Fixed Dimensions toggle is in use.

\*Those in red are required fields.

## Storage Rules

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

Pallet before you begin stacking atop them.

- Shelf Life:** The number of days the Material should be kept in the warehouse for. For a Lot Controlled Material, the Shelf Life is added to the Manufacture Date, and an Expiration Date is automatically created.
- Storage Category Rule:** Designed to specify which Storage Category the Material belongs.

## Material Record Options

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

## Assign Containers

**Assigned Containers** for the Material can be managed here.

Container Assignment Grid									
		Browse containers	Unassign	1 item					
<input type="checkbox"/>	Name *	Description	Length	Width	Height	Dimension uom	Weight capacity	Weight uom	CatchAll
	Large Box	Large Box	23	17	12	in	30	lb	<input type="checkbox"/>
<a href="#">+ Add row</a>									

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

\*Those in red are required fields.

## Material Substitutions

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

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

Substitutions for Fizzy Lifting Drink - Fizzy Lifting Drink X

Material packaging

Bottle X ▾

Substitutions 0 items

Delete Filter 🔍

<input type="checkbox"/> Substitute *	Packaging *	Ratio *	Priority
No results found			

+ Add row

- Substitute:** The Name of the additional Material to use in place of the current Material. This Material must be from the same Owner / Project.
- Packaging:** The Packaging Type that should be set to Primarily Pick from this Location.
- Ratio:** The number of Packages of the substitute Material required to replace one Package of the current Material.
- Priority:** The Priority is used to determine which substitute Material should first be attempted as a replacement. If there is not enough inventory available, the next in line will be used. Priority starts with the lowest number and continues upwards.

\*Those in red are required fields.

## Material Aliases

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

Material aliases for Fizzy Lifting Drink - Fizzy Drink

0 items

Alias account Alias name Alias description Percent discount on sales order cost

No results found

Add row

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

\*Those in red are required fields.

## Material Record Toolbar

For more details on all setup options, please visit our comprehensive [Setup a Material](#) tutorial.

## Edit Material Details

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

### Note

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

## Basic Information

Edit material X

Save Cancel

Material code	Name
<input type="text" value="Everlasting Gobstopper"/>	<input type="text" value="Everlasting Gobstopper"/>
Description	
<input type="text" value="Everlasting Gobstopper"/>	
Status	Material group
<input type="text" value="Active"/> <span style="font-size: small;">X ▾</span>	<input type="text" value="No Material Group"/> <span style="font-size: small;">X ▾</span>

**Material Code:** A short code to identify the Material by, unique to the Project. If using Barcodes, the Material's Barcode would go here.

**Name:** The name of the Material.

**Description:** A short description of what the Material is.

**Status:** There are several pre-defined Statuses to choose from, as well as any custom Statuses added to your system. When a Material is created, the default Status is Active. In the future, if something has changed with the Material, you may want to change its Status. Other Status examples include Inactive, Discontinued, and Damaged.

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

\*Those in red are required fields.

## Configuration

Edit material X

Save Cancel

**Configuration**

Lot controlled <input checked="" type="checkbox"/> Fixed dimension <input checked="" type="checkbox"/> Allocation strategy * <div style="border: 1px solid #ccc; width: 150px; height: 20px; margin-top: 5px;"></div>	Serial controlled <input checked="" type="checkbox"/> Fixed weight <input type="checkbox"/> Storage category rule <div style="border: 1px solid #ccc; width: 150px; height: 20px; margin-top: 5px;"></div>
Shelf life (in days) <input type="text" value="0"/>	Minimum dating span <input type="text" value="0"/>
<input type="checkbox"/> Skip inventory count <input type="checkbox"/> Skip count back <input type="checkbox"/> Scan all packagings <input checked="" type="checkbox"/> Allow receiving	

- Lot Controlled:** Indicates whether or not the Material is Lot Tracked, or Controlled.
- Serial Controlled:** Indicates whether or not the Material is Serial Number Tracked, or Controlled.
- Fixed Dimension:** Indicates whether or not the Material Dimensions are always fixed.
- Fixed Weight:** Indicates whether or not the Material Weight is always fixed.
- Allocation Strategy:** This controls how Footprint decides which active Allocation Strategy the Material will use. Out-of-the-box options include Allocation Strategies with the following configurations:
- **FIFO** (First In First Out) - The Inventory that entered the Warehouse first are assigned to Orders before newer Materials.
  - **FEFO** (First Expired First Out) - Inventory whose Expiration Dates are nearest are assigned to Orders.
  - **FMFO** (First Manufactured First Out) - The Inventory that was originally manufactured first are assigned to Orders before newer Materials.
  - **LEFO** (Last Expired First Out) - The Inventory whose Expiration Dates are furthest away are assigned to Orders.
  - **Largest Package First** - Prioritizes Packaging Types with larger physical dimensions over those with smaller, so that larger items are assigned to Orders first.
  - **Requested Package First** - Prioritizes the Packaging Type specified on the Order Line over any other Packaging Types, so that the requested Packaging is assigned to Orders

whenever available.

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

**Storage Category Rule:** Specifies the Storage Category to which the Material belongs.

**Category Rule:**

**Shelf Life:** The number of days the Material should be kept in the warehouse for. For a Lot Tracked Material, the Shelf Life is added to the Manufacture Date, and an Expiration Date is automatically created.

**Minimum Dating Span:** After receiving, this puts the Material on hold for the amount of days specified.

**Skip Inventory Count:** Indicates whether or not the Material is omitted from Cycle Counts altogether.

**Skip Count Back:** If the Owner of this material requires a Count Back after picking, this setting will override that setting and skip the Count Back for just this Material.

**Scan All Packagings:** Indicates whether or not the Material is required to have all Packages scanned to confirm a Cycle Count.

**Allow Receiving:** Indicates whether or not the Material is able to be received.

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

### (Optional) Manufacturing

Edit material X

**Manufacturing** ^

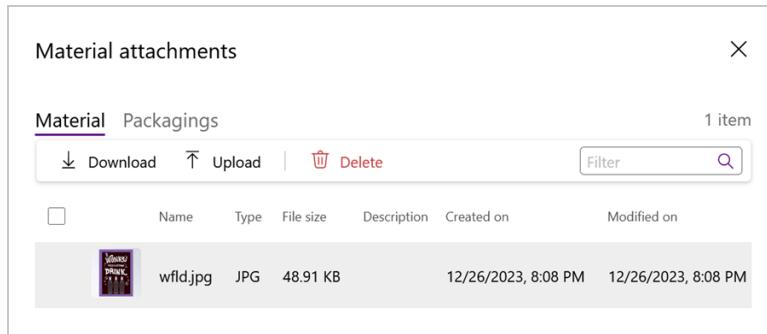
Material type <input type="text"/>	Allowed time outside storage <input type="text"/>
Production rate <input type="text"/>	Required crew size <input type="text"/>

Use oldest expiry date  
 Skip auto-creation of move tasks for the material  
 Enable packaging review

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

## Attachments

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



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

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

## Attachment Details

A thumbnail image when the attachment file is an image file type.

<b>Name:</b>	The Name of the attachment.
<b>Type:</b>	The attachment file Type.
<b>File Size:</b>	The attachment file size in pixels.
<b>Description:</b>	The Description of the attachment.
<b>Created On:</b>	The date the attachment file was uploaded.
<b>Modified On:</b>	The date the attachment file was modified.

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

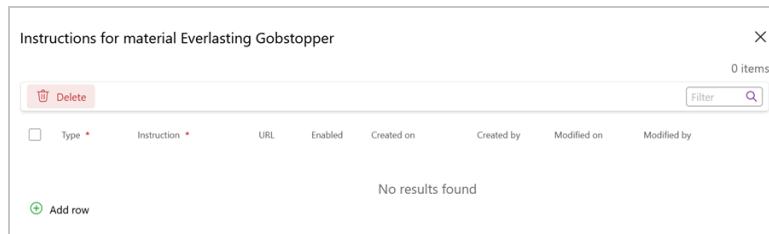
Selecting an existing file and clicking the **Download** option will open a confirmation window and then if confirmed, the file will be downloaded. Selecting an existing file and clicking **Delete** will open a confirmation window and if confirmed, the file will be deleted.

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

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

## Instructions

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



## Material Instruction Details

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

## Material Record Tabs

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

For more details on all setup options, please visit our comprehensive [Setup a Material](#) tutorial.

## Inventory

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

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

## Material Inventory Tab Details

### By Material

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

Material Everlasting Gobstopper														
Inventory type														
<input type="radio"/> By Location		<input type="radio"/> By LP		<input type="radio"/> By Lot		<input checked="" type="radio"/> By Material								
Warehouse	Project	Material	Status	Total	Available	Soft allocated	Inactive	Non allocatable	Packaging available base	Packaging	Total available base	Gross weight	Weight UOM	Material
Tampa	Wonka Chocolates	Everlasting Gobstopper	Active	221	195	26	0	26	195	EA	195	1.705275	lb	Everlast
CheeseOps	Wonka Chocolates	Everlasting Gobstopper	Active	110	110	0	0	0	110	EA	110	0.848779	lb	Everlast

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

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

## By Location

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

Warehouse	Parent zone	Location	Project	Material / Description	Lot / Vendor lot	Total quantity	Available quantity	Inbound order	Expires on
CheeseOps	CheeseOps	M test location - non loose 2		Wonka Chocolates	Everlasting Gobstop...	13018	110 EA	110	01/18/2012
Tampa	0000 Zone	0000000001		Wonka Chocolates	Everlasting Gobstop...	13018	95 EA	95	01/18/2012
Tampa	Bryan-Zone	Cocoa Room		Wonka Chocolates	Everlasting Gobstop...	13017	3 EA	1	71108 01/17/2012
Tampa	Bryan-Zone	Cocoa Room		Wonka Chocolates	Everlasting Gobstop...	13018	1 EA	0	01/18/2012
Tampa	Tampa	DefaultPick		Wonka Chocolates	Everlasting Gobstop...	13017	7 EA	0	71108 01/17/2012

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

## By License Plate

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

Material Everlasting Gobstopper												
Inventory type		Inventory										
By Location		By LP		By Lot		By Material		Inventory				
Vendor lot:	UP status:	Lot status:										
License plate	Location	Warehouse	Project	Material	Material description	Lot	Vendor lot	Total amount	Packaging	Gross weight	Weight UOM	
430751	0000000001	Tampa	Wonka Chocolates	Everlasting Gobstopper	Everlasting Gobstopper	13018	13018	95	EA	0.733037	lb	
Wonka-LP03	Cocoa Room	Tampa	Wonka Chocolates	Everlasting Gobstopper	Everlasting Gobstopper	13017	13017	3	EA	0.023149	lb	
4307511	Cocoa Room	Tampa	Wonka Chocolates	Everlasting Gobstopper	Everlasting Gobstopper	13018	13018	1	EA	0.007716	lb	
136432	DefaultPick	Tampa	Wonka Chocolates	Everlasting Gobstopper	Everlasting Gobstopper	13017	13017	5	EA	0.03858	lb	

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

## By Lot

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

Material Everlasting Gobstopper													
Inventory type		Inventory											
By Location		By LP		By Lot		By Material		Inventory					
Warehouse	Project	Material	Lot	Total amount	Available amount	Packaging	Gross weight	Weight UOM	Inbound order	Vendor lot	Expiration date	Manufacture date	Received date
Tampa	Wonka Chocolates	Everlasting Gobstopper	13017	121	97	EA	0.933657	lb	71108	13017	01/17/2012	01/17/2012	01/17/2012
Tampa	Wonka Chocolates	Everlasting Gobstopper	13018	100	95	EA	0.771617	lb	13018	01/18/2012	01/18/2012	04/11/2023	
CheeseOps	Wonka Chocolates	Everlasting Gobstopper	13018	110	110	EA	0.848779	lb	13018	01/18/2012	01/18/2012	04/11/2023	

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

## License Plates

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

Materials hub > Material Everlasting Gobstopper								
Inventory	License plates	Activity	Packagings	Material Kits	Custom fields	Serial numbers	Replenishments	
Wonka-LP02	Location out Total amount Total gross	5	Wonka-SLP05	Location out Total amount Total gross	2	Wonka-SLP06	Location out Total amount Total gross	1
0.038581			0.015432			0.007716		
Wonka-SLP07	Location out Total amount Total gross	2	Wonka-LP03	Location Cocoa Room Total amount Total gross	3			
0.015432			0.023149					
Wonka-SLP08			Wonka-SLP10			Wonka-SLP11		
							LPinLooseLP	
							2LPinLooseLP	

## Material License Plates Tab Details

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

## Activity

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

Materials hub > Material Everlasting Gobstopper												
<a href="#">Inventory</a> <a href="#">License plates</a> <a href="#">Activity</a> <a href="#">Packagings</a> <a href="#">Material Kits</a> <a href="#">Custom fields</a> <a href="#">Serial numbers</a> <a href="#">Replenishments</a> <a href="#">Primary picks</a>												
<a href="#"> Export</a>												
Operation code:	Warehouse	Operation code	Reason code	Status	Material	Lot	Project	Serial number	Actual	Actual packaging	Expected	Expected packaging
10310536	CheeseOps	Count	Planned	Everlasting Gobstopper	13018	Wonka Chocolates					EA	
10310535	CheeseOps	Count	Planned	Everlasting Gobstopper	13018	Wonka Chocolates					EA	

## Material Activity Tab Details

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

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

## Packagings

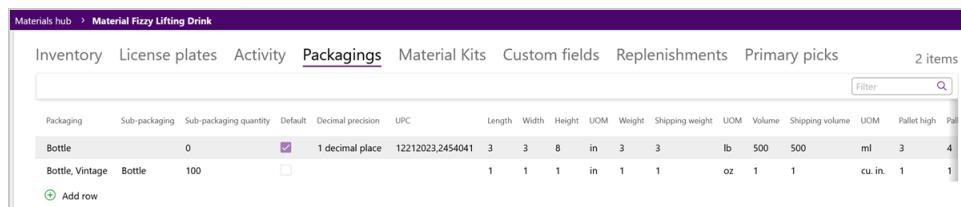
The Material **Packagings** tab allows for the Material's Packagings to be setup. Any existing Packagings are listed for review and management.

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

### Note

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

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



Packaging	Sub-packaging	Sub-packaging quantity	Default	Decimal precision	UPC	Length	Width	Height	UOM	Weight	Shipping weight	UOM	Volume	Shipping volume	UOM	Pallet high	Pal
Bottle		0	<input checked="" type="checkbox"/>	1 decimal place	122120232454041	3	3	8	in	3	3	lb	500	500	ml	3	4
Bottle, Vintage	Bottle	100	<input type="checkbox"/>			1	1	1	in	1	1	oz	1	1	cu. in.	1	1

## Material Packagings Tab Details

**Packaging:** The base level Packaging type.

**Sub-Packaging:** If there is a level of Packaging directly below, select that here. For

example, there may be multiple 'Eaches' (an individual unit) inside a Box, several of which go inside a Case.

<b>Sub-Packaging</b>	The amount of the Sub-Packaging which are able to be contained within the Packaging.
<b>Quantity:</b>	
<b>Default:</b>	When enabled, this Package level will be the default level for the Material. May be tied to Billing.
<b>Decimal Precision:</b>	Allows the Package to be split into fractions. The <b>No Decimals</b> setting does not allow splitting, requiring each Package to be whole; each subsequent setting ( <b>1 Decimal Place</b> , <b>2 Decimal Places</b> , etc.), allow division up to the specified decimal place. For example, the Package "Gallon" with the setting of <b>3 Decimal Places</b> could have an inventory of 3.672 Gallons.
<b>UPC:</b>	Universal Product Code, unique to each level of Packaging. Multiple UPC Codes can be entered here, each separated by a comma.
<b>Length:</b>	Length of Package.
<b>Width:</b>	Width of Package.
<b>Height:</b>	Height of Package.
<b>UOM:</b>	Unit of measurement for distance. Options include meter, centimeter, foot, and inch.
<b>Weight:</b>	Weight of the items in this Package.
<b>Shipping Weight:</b>	Weight of the items in this Package, combined with the weight of the Package itself (Tare Weight).
<b>UOM:</b>	Unit of measurement for weight. Options include kilogram, gram, pound, ounce, ton, troy ounce, and metric ton.
<b>Volume:</b>	The Volume of the Package. Footprint automatically computes a volume based on the length width and height, which is displayed underneath those measurements. Enter that here.
<b>Shipping Volume:</b>	Volume of the Package considering any other factors that may impact the Package before Shipping.
<b>UOM:</b>	Unit of measurement for volume. Options include cubic meter, cubic centimeter, cubic foot, and cubic inch.
<b>Pallet High:</b>	The number of this Package that can be stacked atop each other on a Pallet.
<b>Pallet Tie:</b>	The number of this Package to be placed on the first level of the Pallet before you begin stacking atop them.
<b>Shippable Container:</b>	When enabled, this Packaging can be used as an actual Shipping Container, and does not need to be packed further.
<b>Autogenerate Serials:</b>	When enabled, Serial Numbers will be automatically generated with a sequential Serial Number when prompted for this Packaging level.
<b>Stack Group:</b>	A field for entering a group name for this item when Stacked. Used for Cartonization process.

\*Those in red are required fields.

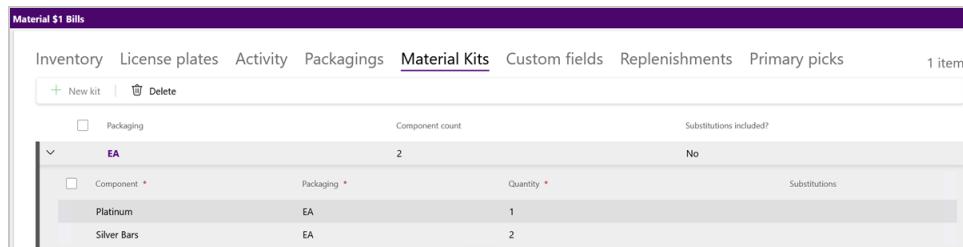
## Material Kits

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

### Example

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

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



## Material Kits Tab Details

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

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

## Material Kits Tab Component Details

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

- |                   |  |
|-------------------|--|
| <b>Component:</b> | The individual Materials that will make up the kit. The Materials available for selection must already exist under the Owner of the Kit. |
|-------------------|--|

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

\*Those in red are required fields.

## Custom Fields

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

Materials hub > Material Everlasting Gobstopper		
Inventory	License plates	Activity
Packagings	Material Kits	Custom fields
Project	Material	Description
Wonka Chocolates	Everlasting Gobstopper	Everlasting Gobstopper

## Serial Numbers

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

Materials hub > Material Everlasting Gobstopper														
Inventory	License plates	Activity	Packagings	Material Kits	Custom fields	Serial numbers	Replenishments	Primary picks	Filter					
<input type="checkbox"/> Adjust quantity	<input type="checkbox"/> Move inventory	<input type="checkbox"/> Distribute total weight	<input type="checkbox"/> Export	Lot:	Packaging:									
<input type="checkbox"/>	Serial number	Packaging	Status	Material	Material group	Material description	Lot	Vendor lot	Project	Net weight	Gross weight	Weight UOM	Length	Width
SI100-181932	EA	Active	Everlasting Gobstopper	No Material Group	Everlasting Gobstopper	13018	13018	Wonka Chocolates	3	3.5	g	1	1	
SI99-113344	EA	Active	Everlasting Gobstopper	No Material Group	Everlasting Gobstopper	13018	13018	Wonka Chocolates	3	3.5	g	1	1	
SI98-506852	EA	Active	Everlasting Gobstopper	No Material Group	Everlasting Gobstopper	13018	13018	Wonka Chocolates	3	3.5	g	1	1	
SI97-759659	EA	Active	Everlasting Gobstopper	No Material Group	Everlasting Gobstopper	13018	13018	Wonka Chocolates	3	3.5	g	1	1	

## Material Serial Numbers Tab Details

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

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

## Replenishments

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

Location	Material	Rule trigger	Replenishment quantity	Minimum quantity	Maximum quantity	On demand	System triggered	Owner / Project	Warehouse
0000000001	Everlasting Gobstopper	Less Than Or Equal To	20 EA	20 EA		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	WonkaCorp / Wonka Chocolates	Tampa

## Material Replenishments Tab Details

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

\*Those in red are required fields.

## Primary Picks

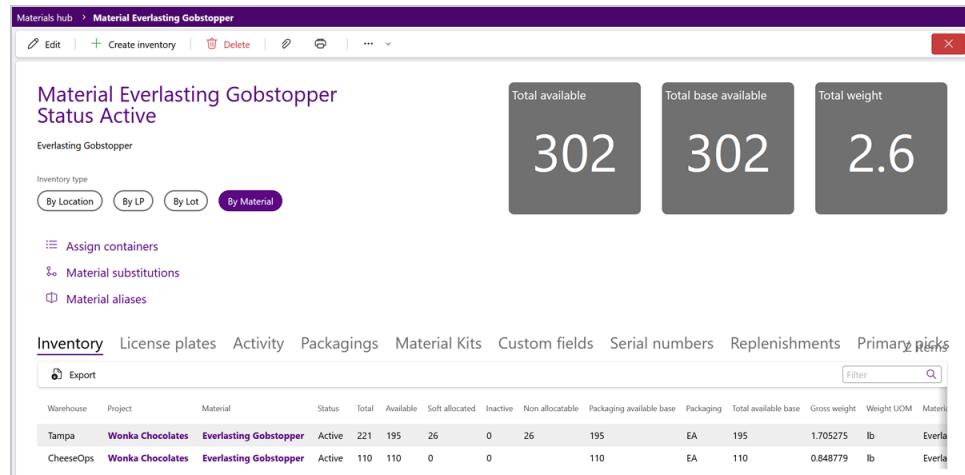
The Material **Primary Picks** tab lists any designated Primary Pick Locations for the Material. The **Delete** button in the Primary Pick tab toolbar allows users to delete the selected Material Primary Pick Location(s).

Warehouse	Location	Packaging	Overallocate	Enabled/Disabled
Tampa	Wonka Forward Picking	LB	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Tampa	Wonka Forward Picking	LB	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

## Material Primary Picks Tab Details

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

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



The screenshot shows the Materials hub interface for the material "Everlasting Gobstopper". The top navigation bar includes "Edit", "Create inventory", "Delete", and other standard toolbar icons. The main title is "Material Everlasting Gobstopper Status Active". Below the title, there's a section for "Everlasting Gobstopper" with three summary cards: "Total available" (302), "Total base available" (302), and "Total weight" (2.6). A "By Location" button is highlighted in purple, indicating it is selected. Below this, there are links for "Assign containers", "Material substitutions", and "Material aliases". A navigation bar at the bottom includes tabs for "Inventory", "License plates", "Activity", "Packagings", "Material Kits", "Custom fields", "Serial numbers", "Replenishments", and "Primary picks". The "Inventory" tab is currently active. An "Export" button is visible, along with a search bar labeled "Filter". The main content area displays a table of inventory data:

Warehouse	Project	Material	Status	Total	Available	Soft allocated	Inactive	Non allocatable	Packaging available base	Packaging	Total available base	Gross weight	Weight UOM	Material
Tampa	Wonka Chocolates	Everlasting Gobstopper	Active	221	195	26	0	26	195	EA	195	1.705275	lb	Everlastin
CheeseOps	Wonka Chocolates	Everlasting Gobstopper	Active	110	110	0	0	0	110	EA	110	0.848779	lb	Everlastin

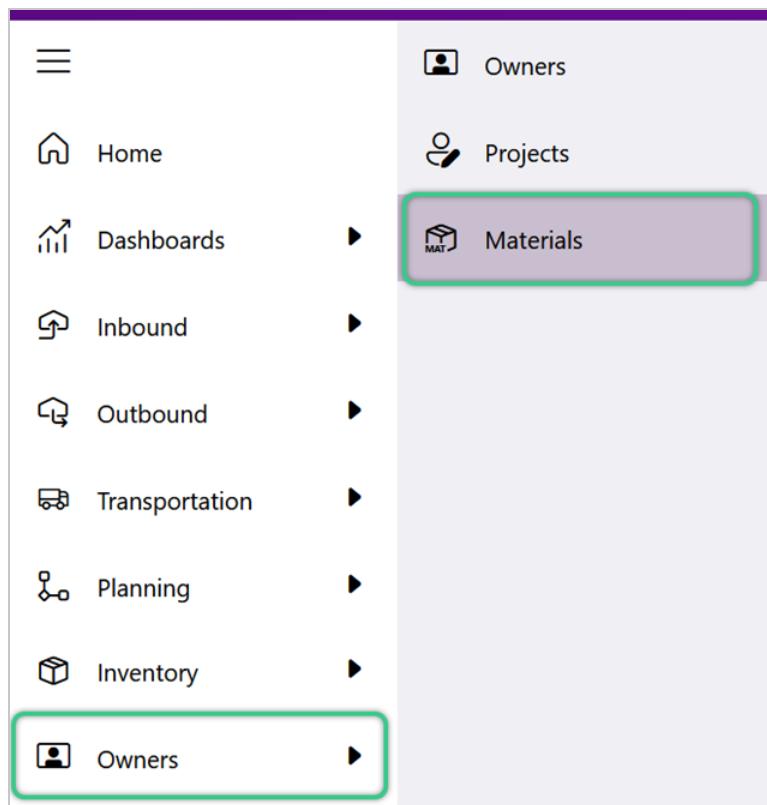
# Create a Packaging

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

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

## Step 1. Open the Materials Hub

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



The Materials Hub will display.

The screenshot shows the Materials hub interface. At the top, there are navigation links: New material, Import materials, Copy materials, Packages (which is highlighted), and Material catalogs. A large digital badge on the right displays "Total materials 16". Below the header, there are sections for "Filters" (Owner: WonkaCorp, Project dropdown) and "Custom fields". The main area is titled "Materials" and "Materials packagings", showing a table with 16 items. The columns include Material, Owner, Project, Source catalog, Total primary pick count, Total primary pick sum, Total non primary pick sum, Lot controlled, Serial controlled, and Fixed weight. The data in the table is as follows:

Material	Owner	Project	Source catalog	Total primary pick count	Total primary pick sum	Total non primary pick sum	Lot controlled	Serial controlled	Fixed weight
Almonds	WonkaCorp	Wonka Chocolates		2	63		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Buttermilk	WonkaCorp	Wonka Chocolates		1	5	38256.5	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Caramel	WonkaCorp	Wonka Chocolates		0	0	6091	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Chocolate Caramel Turtle	WonkaCorp	Wonka Chocolates		2	2272.000001	14134.80246122	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

## Step 2. Create the New Packaging

1. Click Packages in the top menu.

The screenshot shows the Materials hub interface with the "Packages" menu item highlighted by a green box. The rest of the interface is identical to the previous screenshot, displaying the Materials hub with a list of materials and their packaging details.

The Packages window will display.

Packages							
Name *	Length *	Width *	Height *	L x W x H measure *	Weight *	Shipping weight *	Weight measure *
Bar[LDN]	0	0	0	ft	0	0	lb
BGBox	50	50	50	cm	25	25	kg
BGPallet	1	1	1	m	50	51	kg
BI	1	1	1	in	1	1.5	oz
BL	2	2	4	ft	150	150	lb

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

Packages							
Name *	Length *	Width *	Height *	L x W x H measure *	Weight *	Shipping weight *	Weight measure *
Bar[LDN]	0	0	0	ft	0	0	lb
BGBox	50	50	50	cm	25	25	kg
BGPallet	1	1	1	m	50	51	kg
BI	1	1	1	in	1	1.5	oz
BL	2	2	4	ft	150	150	lb

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



These packaging measurements are used for Cartonization.

Packages								
Name *	Length *	Width *	Height *	L x W x H measure *	Weight *	Shipping weight *	Weight measure *	X
Bar[LDN]	0	0	0	ft	0	0	lb	
BGBox	50	50	50	cm	25	25	kg	
BGPallet	1	1	1	m	50	51	kg	
BI	1	1	1	in	1	1.5	oz	
BL	2	2	4	ft	150	150	lb	
Box Sm	12.00	10	6.00	in	1.00	1.00	oz	

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

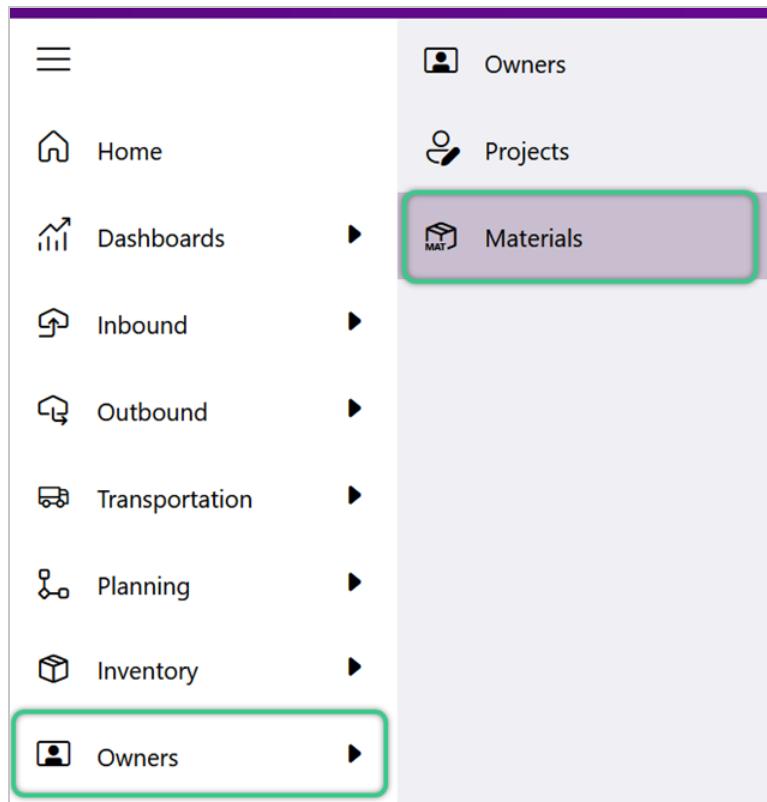
Packages								
Name *	Length *	Width *	Height *	L x W x H measure *	Weight *	Shipping weight *	Weight measure *	X
Bar[LDN]	0	0	0	ft	0	0	lb	
BGBox	50	50	50	cm	25	25	kg	
BGPallet	1	1	1	m	50	51	kg	
BI	1	1	1	in	1	1.5	oz	
BL	2	2	4	ft	150	150	lb	
Box Sm	12.00	10	6.00	in	1.00	1.00	oz	

# Create a Material

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

## Step 1. Open the Materials Hub

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



The Materials Hub will display.

The screenshot shows the Materials hub interface. At the top, there are navigation links: '+ New material', 'Import materials', 'Copy materials', 'Packages', and 'Material catalogs'. A large digital badge on the right displays 'Total materials 16'. Below this, a section titled 'Materials hub' contains a 'Filters' dropdown set to 'Owner: WonkaCorp' and 'Project: Wonka Chocolates'. A 'Custom fields' link is also present. The main area is titled 'Materials' and shows a table with 16 items. The columns include Material, Owner, Project, Source catalog, Total primary pick count, Total primary pick sum, Total non primary pick sum, Lot controlled, Serial controlled, and Fixed weight. The table lists four materials: Almonds, Buttermilk, Caramel, and Chocolate Caramel Turtle, all owned by WonkaCorp and part of the Wonka Chocolates project.

Material	Owner	Project	Source catalog	Total primary pick count	Total primary pick sum	Total non primary pick sum	Lot controlled	Serial controlled	Fixed weight
Almonds	WonkaCorp	Wonka Chocolates		2	63		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Buttermilk	WonkaCorp	Wonka Chocolates		1	5	38256.5	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Caramel	WonkaCorp	Wonka Chocolates		0	0	6091	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Chocolate Caramel Turtle	WonkaCorp	Wonka Chocolates		2	2272.000001	14134.80246122	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

## Step 2. Create the New Material

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

This screenshot shows the Materials hub interface with the '+ New material' button highlighted in green. The rest of the interface is identical to the previous one, displaying the 'Materials hub' title, filters, and a table of materials. The table shows two entries: Almonds and Buttermilk, both owned by WonkaCorp and part of the Wonka Chocolates project.

Material	Owner	Project	Source catalog	Total primary
Almonds	WonkaCorp	Wonka Chocolates		2
Buttermilk	WonkaCorp	Wonka Chocolates		1

The **New Material** window will display.

### New material

**Save**   **Cancel**

Material code *	Name
<input type="text"/>	<input type="text"/>
Description *	
<input type="text"/>	
Owner *	Project *
<input type="text"/> X   V	<input type="text"/> X   V
Packaging *	UPC code
<input type="text"/> X   V	<input type="text"/>
Group *	
<input type="text"/> X   V	
Configuration	
<input type="text"/>	
Measurements	
<input type="text"/>	
Storage rules	
<input type="text"/>	

### Step 3. Enter Material Basics

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

**Note**

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

New material X

Save Cancel

Material code *	Name
Wonka Bar	Wonka Bar
Description *	
Owner *	Project *
▼	▼
Packaging *	UPC code
▼	▼
Group *	
100#+ > Salmon <span style="float: right;">X</span> <span style="border: 1px solid #ccc; border-radius: 4px; padding: 0 4px;">▼</span>	

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

New material X

Save Cancel

Material code *	Name
Wonka Bar	Wonka Bar
<b>Description *</b> <input type="text" value="Wonka Chocolate Bar"/>	
Owner *	Project *
▼	▼
Packaging *	UPC code
▼	▼
<b>Group *</b> <input type="text" value="100#+ &gt; Salmon"/> <span style="font-size: small;">X</span> <span style="font-size: small;">▼</span>	

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

New material X

**Save** **Cancel**

Material code *	Name
Wonka Bar	Wonka Bar
Description *	
Wonka Chocolate Bar	
Owner *	Project *
WonkaCorp	Wonka Chocolates
Packaging *	UPC code
Group *	
100#+ > Salmon	

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

New material X

Save Cancel

Material code *	Name
<input type="text" value="Wonka Bar"/>	<input type="text" value="Wonka Bar"/>
Description *	
<input type="text" value="Wonka Chocolate Bar"/>	
Owner *	Project *
<input type="text" value="WonkaCorp"/> <span style="font-size: small;">X ▾</span>	<input type="text" value="Wonka Chocolates"/> <span style="font-size: small;">X ▾</span>
Packaging *	UPC code
<input type="text" value="box1"/> <span style="font-size: small;">X ▾</span>	<input type="text" value="3362641694"/>
Group *	
<input type="text" value="100#+ &gt; Salmon"/> <span style="font-size: small;">X ▾</span>	

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

New material X

**Save** **Cancel**

Material code *	Name
Wonka Bar	Wonka Bar
Description *	
Wonka Chocolate Bar	
Owner *	Project *
WonkaCorp	Wonka Chocolates
Packaging *	UPC code
box1	3362641694
Group *	
BGPackedFood	
Configuration <span style="float: right;">^</span>	

**Step 4. Configure the Material**

The **Allocation Strategy** takes into account related material information when creating Pick Slips for Outbound Shipments. This allows Inventory to be selected to Ship based on set preferences. For example, First Expired, First Out (FEFO) and First In, First Out (FIFO).

## 1. Select a required Allocation Strategy.

### Allocation Strategies

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

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

### Tip

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

New material X

**Save** **Cancel**

Group \*

BGPackedFood X ▾

**Configuration** ^

Allocation strategy \*

FIFO Lot With Requested Packag... X ▾

Track lots  Track serials

**Measurements** ^

Decimal precision

1 decimal place X ▾

Fixed weight

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

### New material

SaveCancel

Group \*

BGPackedFood X V

Configuration

Allocation strategy \*

FIFO Lot With Requested Packag... X V

Track lots Track serials

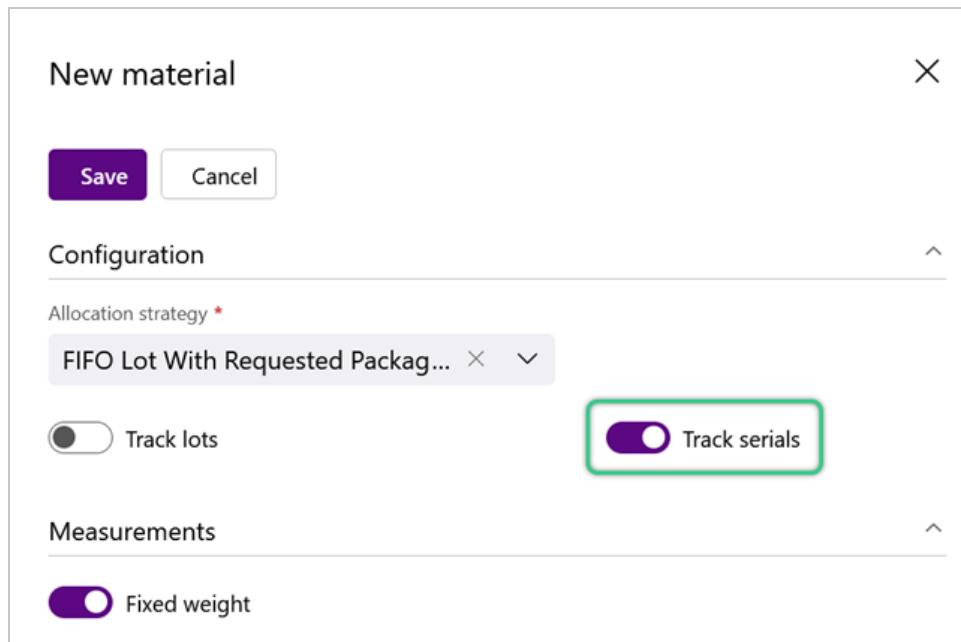
Measurements

Decimal precision

V

Fixed weight

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



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

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

### New material

**Save** **Cancel**

Group \*

BGPackedFood

Configuration

Allocation strategy \*

FIFO Lot With Requested Packag...

Track lots    Track serials

Measurements

Decimal precision

1 decimal place

Fixed weight

## Step 5. Enter Material Measurements

### Warning

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

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

### New material

SaveCancel

#### Measurements

Decimal precision  
1 decimal place X ▼

Fixed weightWeight \*1.00

Shipping weight \*1.00

Weight measure \*lbX▼

Fixed volume

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

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

New material X

Save Cancel

**Measurements**

Fixed weight

Weight *	Shipping weight *
<input type="text" value="100.00"/>	<input type="text" value="100.00"/>

Weight measure \*

g X ▼

Fixed volume

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

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

New material X

Save Cancel

**Measurements** ^

Fixed weight

Weight \* 100.00 Shipping weight \* 100.00

Weight measure \* g x v

Fixed volume

Volume \* 10.30 Shipping volume \* 10.30

Volume measure \* cu. in. x v

Fixed dimensions

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

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

New material X

Save Cancel

**Measurements** ^

Fixed weight

Weight \* 100.00 Shipping weight \* 100.00

Weight measure \* g X ▼

Fixed volume

Volume \* 10.30 Shipping volume \* 10.30

Volume measure \* cu. in. X ▼

Fixed dimensions

Length \* 6.00 Width \* 3.00

Height \* 0.80 L x W x H measure \* in X ▼

Storage rules ▼

## Step 6. Set Material Storage Rules

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

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

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

New material X

Save Cancel

Description \* Wonka Chocolate Bar

Owner \* WonkaCorp X ▾ Project \* Wonka Chocolates X ▾

Packaging \* box1 X ▾ UPC code 3362641694

Group \* BGPackedFood X ▾

Configuration ▼

Measurements ▼

Storage rules ^

Pallet high	Pallet tie
5	20

Shelf life (in days) 0 Storage category rule ▼

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

**Tip**

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

New material X

Save Cancel

Description \* Wonka Chocolate Bar

Owner \* WonkaCorp X ▾ Project \* Wonka Chocolates X ▾

Packaging \* box1 X ▾ UPC code 3362641694

Group \* BGPackedFood X ▾

Configuration ▼

Measurements ▼

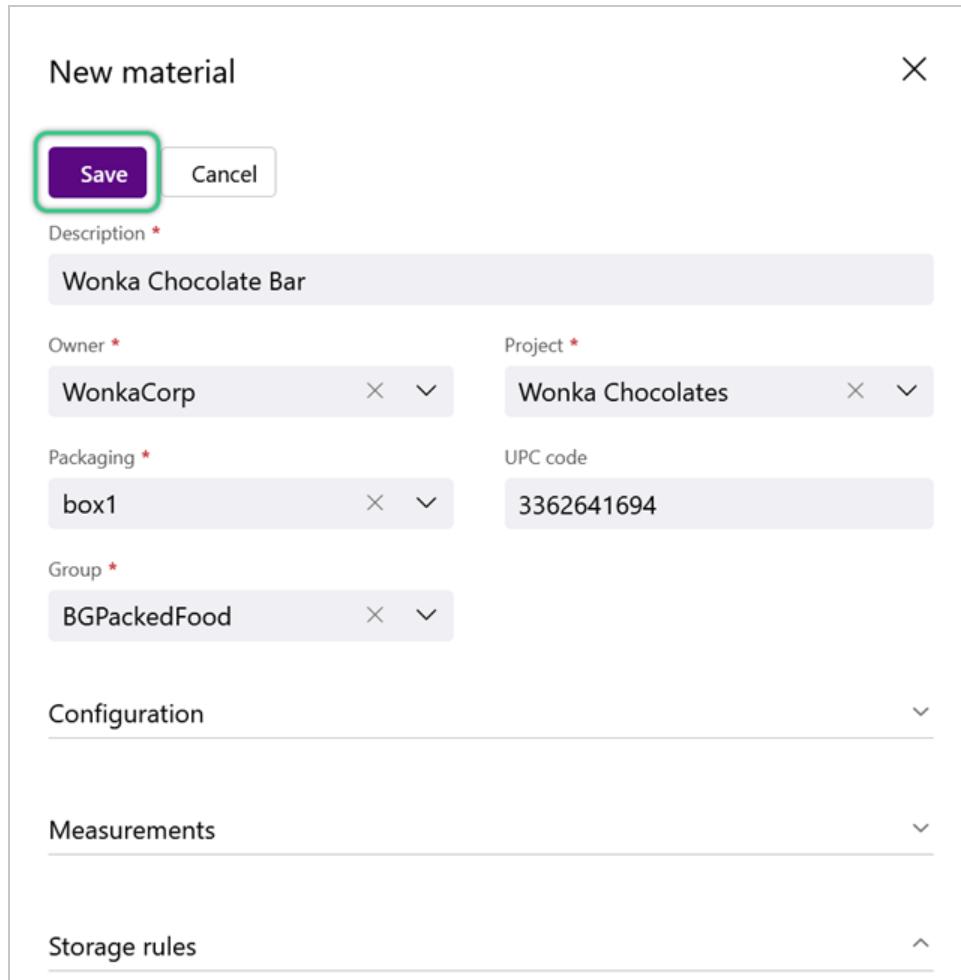
Storage rules ^

Pallet high	Pallet tie
<input type="text" value="5"/>	<input type="text" value="20"/>

Shelf life (in days) 90 Storage category rule Cooler Goods X ▾

**Step 7. Save the New Material**

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



The screenshot shows the 'New material' creation window. At the top left is a purple 'Save' button with a green rectangular highlight around it. To its right is a 'Cancel' button. Below these are several input fields: 'Description \*' with the value 'Wonka Chocolate Bar'; 'Owner \*' with the value 'WonkaCorp'; 'Project \*' with the value 'Wonka Chocolates'; 'Packaging \*' with the value 'box1'; 'UPC code' with the value '3362641694'; and 'Group \*' with the value 'BGPackedFood'. Below these fields are three expandable sections: 'Configuration' (with a downward arrow), 'Measurements' (with a downward arrow), and 'Storage rules' (with an upward arrow). The entire window has a light gray background and a white header bar.

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

# Import Materials

---

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

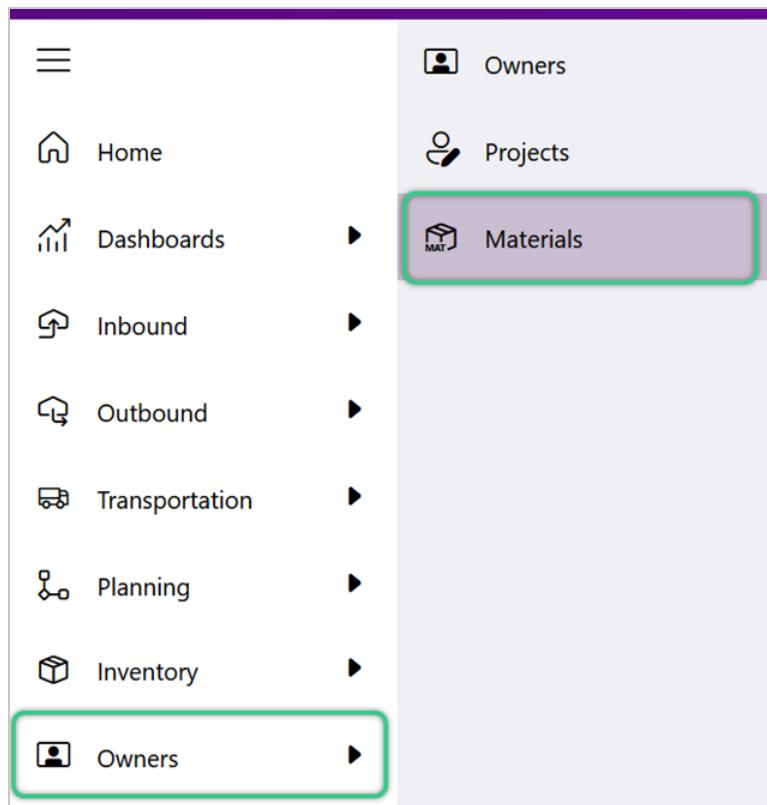
## Please Note

---

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

## Step 1. Open the Materials Hub

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



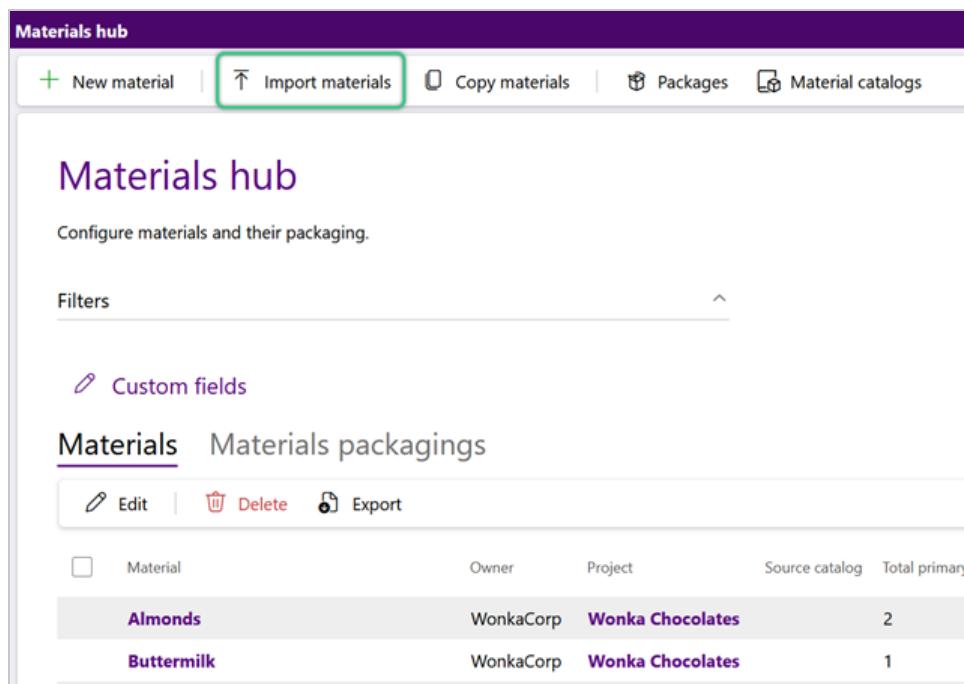
The **Materials Hub** will display.

The screenshot shows the Materials hub interface. At the top, there are buttons for 'New material', 'Import materials', 'Copy materials', 'Packages', and 'Material catalogs'. Below this is a summary card with the text 'Total materials' and the number '16'. On the left, there are filters for 'Owner' (set to 'WonkaCorp') and 'Project'. Under 'Materials', there is a table with columns: Material, Owner, Project, Source catalog, Total primary pick count, Total primary pick sum, Total non primary pick sum, Lot controlled, Serial controlled, and Fixed weight. The table lists four materials: Almonds, Buttermilk, Caramel, and Chocolate Caramel Turtle, all owned by WonkaCorp and project to Wonka Chocolates.

Material	Owner	Project	Source catalog	Total primary pick count	Total primary pick sum	Total non primary pick sum	Lot controlled	Serial controlled	Fixed weight
Almonds	WonkaCorp	Wonka Chocolates		2	10	63	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Buttermilk	WonkaCorp	Wonka Chocolates		1	5	38256.5	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Caramel	WonkaCorp	Wonka Chocolates		0	0	6091	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Chocolate Caramel Turtle	WonkaCorp	Wonka Chocolates		2	2272.000001	14134.80246122	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

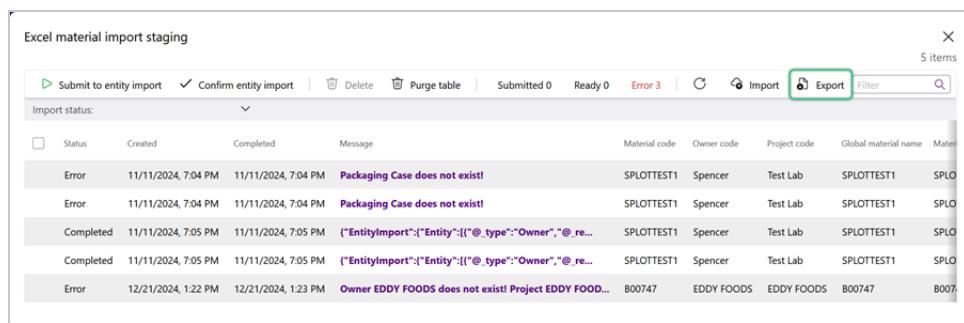
## Step 2. Download the Materials Template File

1. Click Import Materials in the top menu.



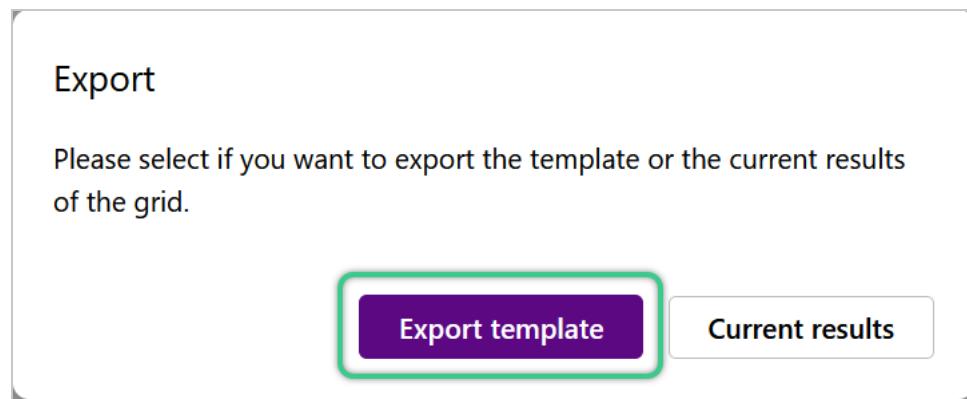
The screenshot shows the Materials hub interface. At the top, there is a navigation bar with several options: 'New material' (green plus icon), 'Import materials' (highlighted with a green box), 'Copy materials' (blue square icon), 'Packages' (blue square icon with a checkmark), and 'Material catalogs' (blue square icon). Below the navigation bar, the title 'Materials hub' is displayed in purple. A sub-header 'Configure materials and their packaging.' follows. Underneath, there is a 'Filters' section with a 'Custom fields' option. The main area is divided into two tabs: 'Materials' (selected) and 'Materials packagings'. Below these tabs are three buttons: 'Edit' (pencil icon), 'Delete' (trash icon), and 'Export' (file icon). The 'Materials' table has columns for 'Material' (checkbox), 'Owner', 'Project', 'Source catalog', and 'Total primary'. It lists two items: 'Almonds' and 'Buttermilk', both owned by 'WonkaCorp' and part of 'Wonka Chocolates', with a total of 2 primary materials for Almonds and 1 for Buttermilk.

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



The screenshot shows the 'Excel material import staging' window. At the top, there are several buttons: 'Submit to entity import' (green checkmark icon), 'Confirm entity import' (checkmark icon), 'Delete' (trash icon), 'Purge table' (trash icon), 'Submitted 0', 'Ready 0', 'Error 3', 'Import' (blue square icon), 'Export' (highlighted with a green box), and 'Filter' (magnifying glass icon). The 'Import status:' dropdown shows '5 items'. The main table has columns: 'Status', 'Created', 'Completed', 'Message', 'Material code', 'Owner code', 'Project code', 'Global material name', and 'Material'. The table contains five rows: 1. Error at 11/11/2024, 7:04 PM, 11/11/2024, 7:04 PM, 'Packaging Case does not exist!', SPLOTTEST1, Spencer, Test Lab, SPLOTTEST1, SPLO. 2. Error at 11/11/2024, 7:04 PM, 11/11/2024, 7:04 PM, 'Packaging Case does not exist!', SPLOTTEST1, Spencer, Test Lab, SPLOTTEST1, SPLO. 3. Completed at 11/11/2024, 7:05 PM, 11/11/2024, 7:05 PM, ('EntityImport':{("Entity":{("@\_type":"Owner","@\_re... SPLOTTEST1, Spencer, Test Lab, SPLOTTEST1, SPLO. 4. Completed at 11/11/2024, 7:05 PM, 11/11/2024, 7:05 PM, ('EntityImport':{("Entity":{("@\_type":"Owner","@\_re... SPLOTTEST1, Spencer, Test Lab, SPLOTTEST1, SPLO. 5. Error at 12/21/2024, 1:22 PM, 12/21/2024, 1:23 PM, 'Owner EDDY FOODS does not exist! Project EDDY FOOD...', B00747, EDDY FOODS, EDDY FOODS, B00747, B007.

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



### Step 3. Complete the Materials Template File

#### Note

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

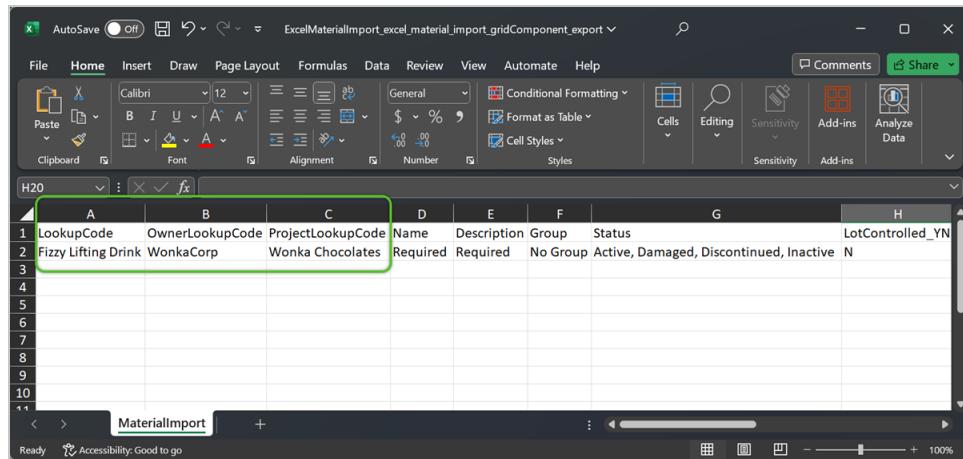
1. Locate the file named 'ExcelMaterialImport\_excel\_material\_import\_gridComponent\_export' and double click on it to open it.



#### Note

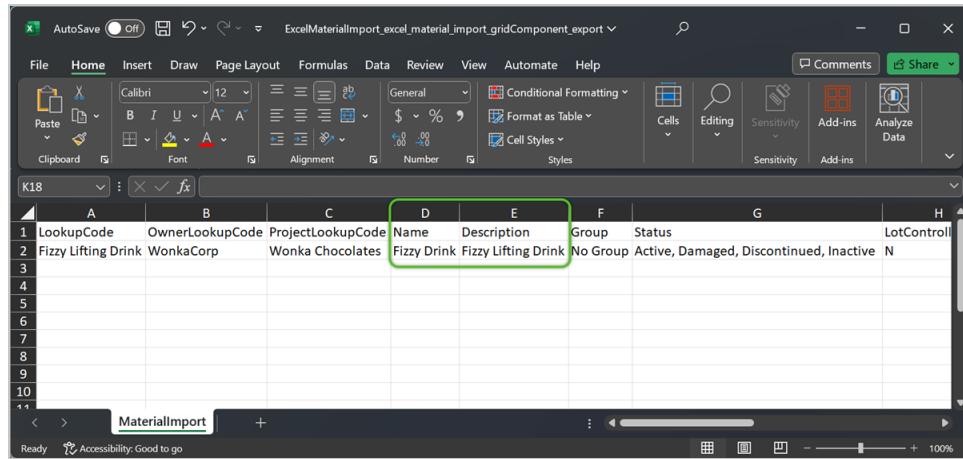
When adding data to the material import file, all capitalization, spelling, and spacing-- including spaces at the beginning or end that may not be easily seen, must match exactly with the fields in Footprint. An error will occur when importing if values in the file do not exactly match those in Footprint.

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



LookupCode	OwnerLookupCode	ProjectLookupCode	Name	Description	Group	Status	LotControlled_YN
Fizzy Lifting Drink	WonkaCorp	Wonka Chocolates					
Required	Required	No Group	Active, Damaged, Discontinued, Inactive	N			
4							
5							
6							
7							
8							
9							
10							

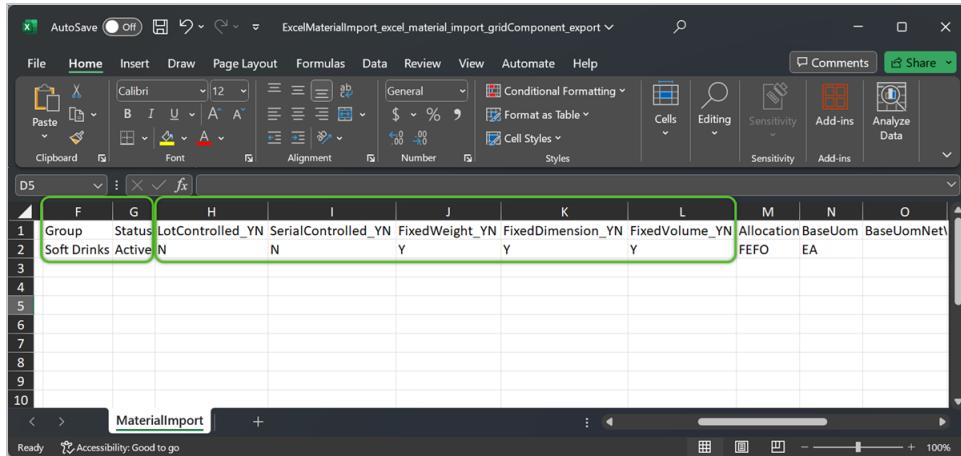
4. Enter the required material **Name** and **Description**.



LookupCode	OwnerLookupCode	ProjectLookupCode	Name	Description	Group	Status	LotControlled_YN
Fizzy Lifting Drink	WonkaCorp	Wonka Chocolates	Fizzy Drink	Fizzy Lifting Drink	No Group	Active, Damaged, Discontinued, Inactive	N
3							
4							
5							
6							
7							
8							
9							
10							

5. Enter the required **Group** and **Status**, then indicate either Y or N to **LotControlled\_YN**, **SerialControlled\_YN**, **FixedWeight\_YN**, **FixedDimension\_YN**, and **FixedVolume\_YN**.

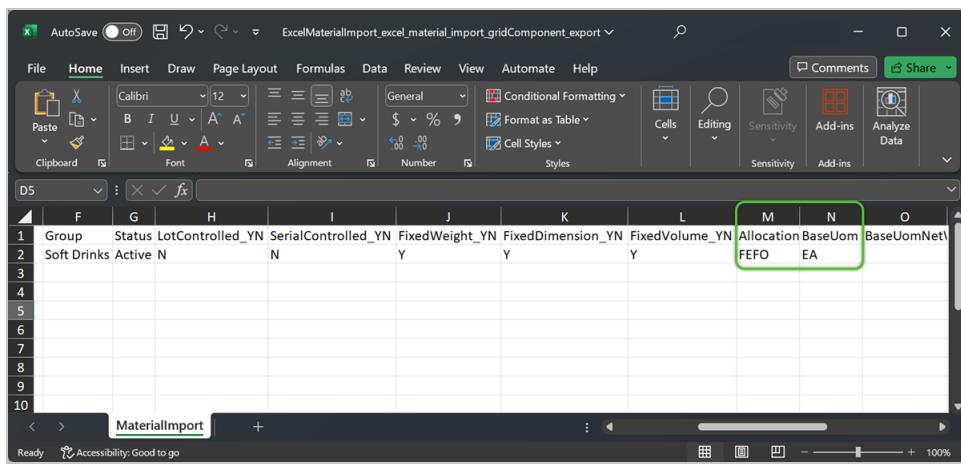
The Material **Group** drives custom behaviors for handling or billing. **Lot Controlled Materials** use Lots, capturing **Manufacturing** and **Expiration Dates**. **Serial Controlled Materials** add **Serial Numbers** for each individual piece of Inventory.



Group	Status	LotControlled_YN	SerialControlled_YN	FixedWeight_YN	FixedDimension_YN	FixedVolume_YN	Allocation	BaseUom	BaseUomNet
Soft Drinks	Active	N	N	Y	Y	Y	FEFO	EA	

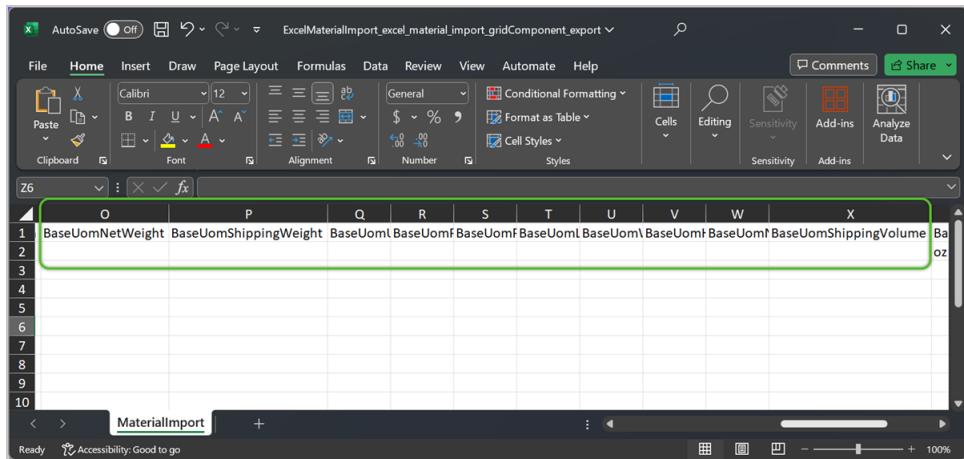
6. Select a required **AllocationStrategy** and indicate the **UOM** (Unit of Measure). The **UOM** value is the **Short Name** of the **Packaging** in Footprint.

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



Group	Status	LotControlled_YN	SerialControlled_YN	FixedWeight_YN	FixedDimension_YN	FixedVolume_YN	Allocation	BaseUom	BaseUomNet
Soft Drinks	Active	N	N	Y	Y	Y	FEFO	EA	

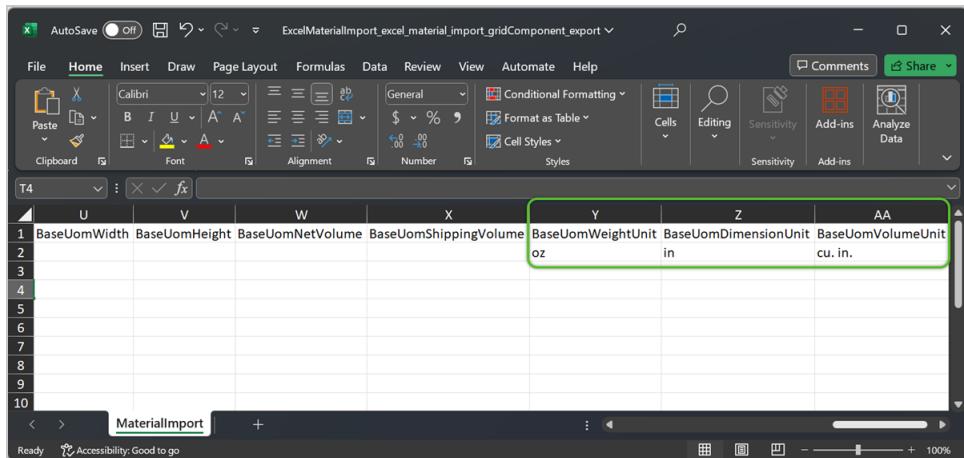
7. When possible, enter details in the remaining optional columns, keeping mind that the Import process is not intended for future data updates.



O	P	Q	R	S	T	U	V	W	X
BaseUomNetWeight	BaseUomShippingWeight	BaseUom	BaseUomf	BaseUom	BaseUom	BaseUom	BaseUom	BaseUom	BaseUomShippingVolume
4									
5									
6									
7									
8									
9									
10									

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

9. Save and close the spreadsheet.



U	V	W	X	Y	Z	AA
BaseUomWidth	BaseUomHeight	BaseUomNetVolume	BaseUomShippingVolume	BaseUomWeightUnit	BaseUomDimensionUnit	BaseUomVolumeUnit
				oz	in	cu. in.
4						
5						
6						
7						
8						
9						
10						

## Step 4. Import the Materials File

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

Excel material import staging									
				Import status:					
Status	Created	Completed	Message	Material code	Owner code	Project code	Global material name	Mater...	
Error	11/11/2024, 7:04 PM	11/11/2024, 7:04 PM	Packaging Case does not exist!	SPLITTEST1	Spencer	Test Lab	SPLITTEST1	SPLO...	
Error	11/11/2024, 7:04 PM	11/11/2024, 7:04 PM	Packaging Case does not exist!	SPLITTEST1	Spencer	Test Lab	SPLITTEST1	SPLO...	
Completed	11/11/2024, 7:05 PM	11/11/2024, 7:05 PM	{"EntityImport":{"Entity":[{"@_type":"Owner","@_re...}}	SPLITTEST1	Spencer	Test Lab	SPLITTEST1	SPLO...	
Completed	11/11/2024, 7:05 PM	11/11/2024, 7:05 PM	{"EntityImport":{"Entity":[{"@_type":"Owner","@_re...}}	SPLITTEST1	Spencer	Test Lab	SPLITTEST1	SPLO...	
Error	12/21/2024, 1:22 PM	12/21/2024, 1:23 PM	Owner EDDY FOODS does not exist! Project EDDY FOOD...	B00747	EDDY FOODS	EDDY FOODS	B00747	B007...	

The material details from the spreadsheet will display for review.

Excel material import staging									
				Import status: Ready					
Status	Created	Material code	Owner code	Project code	Material name	Material description	Material group	Material status	Lot controlled_yn
Ready	04/07/2025, 7:57 PM	Fizzy Lifting Drink TEST	WonkaCorp	Wonka Chocolates				N	N Y

## Step 5. Review and Ready the Materials for Import

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

Excel material import staging									
				Import status: Ready					
Status	Created	Material code	Owner code	Project code	Material name	Material description	Material group	Material status	Lot controlled_yn
Ready	04/07/2025, 7:57 PM	Fizzy Lifting Drink TEST	WonkaCorp	Wonka Chocolates				N	N Y

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

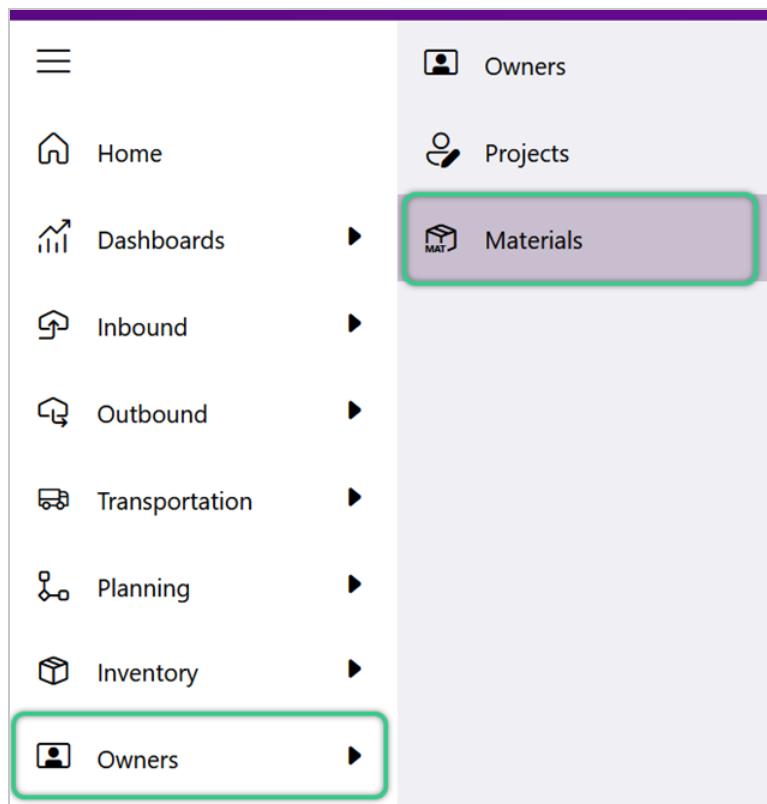
Excel material import staging									
				Import status: Ready					
Status	Created	Material code	Owner code	Project code	Material name	Material description	Material group	Material status	Lot controlled_yn
Ready	04/07/2025, 7:57 PM	Fizzy Lifting Drink TEST	WonkaCorp	Wonka Chocolates				N	N Y

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

# Copy a Material

There may be times when it is easier to copy an existing Material and make minor changes, rather than creating a new Material from scratch. Follow the steps below to copy a Material. For comprehensive Material setup options, please visit our [Setup a Material](#) article.

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



The Materials Hub will display.

The screenshot shows the Materials hub interface. At the top, there are navigation links: New material, Import materials, Copy materials (which is highlighted with a green border), Packages, and Material catalogs. Below the header, a large digital badge displays the number '16' under the heading 'Total materials'. The main area is titled 'Materials hub' and contains a sub-header 'Configure materials and their packaging.' A 'Filters' section includes dropdown menus for 'Owner' (set to 'WonkaCorp') and 'Project' (set to 'Project'). There is also a 'Custom fields' section. The main table lists four materials: Almonds, Buttermilk, Caramel, and Chocolate Caramel Turtle, all owned by WonkaCorp and part of the Wonka Chocolates project. The table includes columns for Material, Owner, Project, Source catalog, Total primary pick count, Total primary pick sum, Total non primary pick sum, Lot controlled, Serial controlled, and Fixed weight.

Material	Owner	Project	Source catalog	Total primary pick count	Total primary pick sum	Total non primary pick sum	Lot controlled	Serial controlled	Fixed weight
Almonds	WonkaCorp	Wonka Chocolates		2	63		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Buttermilk	WonkaCorp	Wonka Chocolates		1	5	38256.5	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Caramel	WonkaCorp	Wonka Chocolates		0	0	6091	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Chocolate Caramel Turtle	WonkaCorp	Wonka Chocolates		2	2272.000001	14134.80246122	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

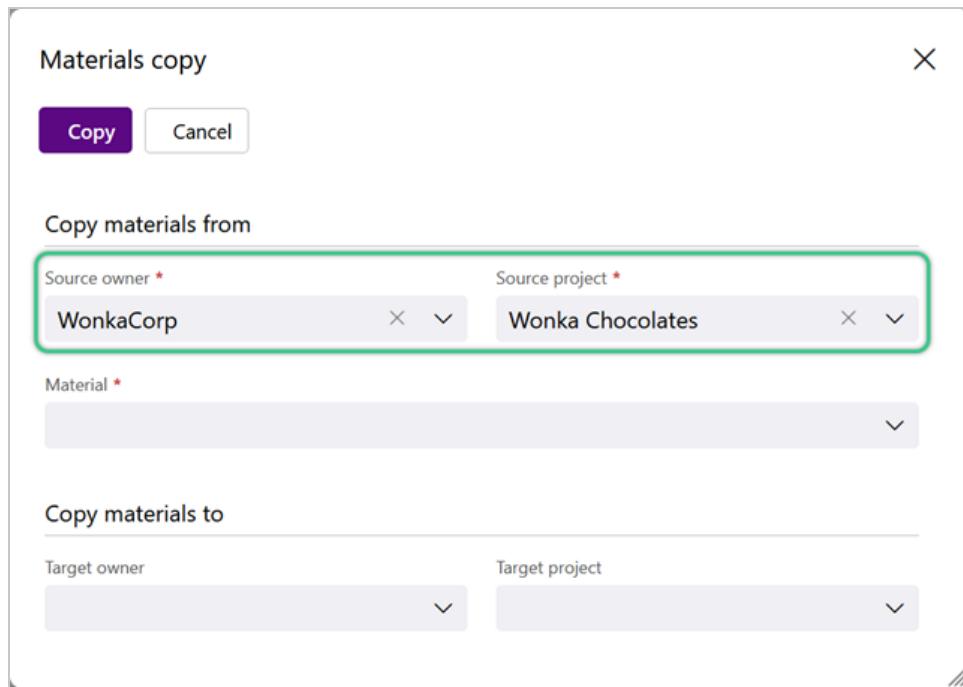
## Step 2. Copy a Material

1. Click Copy Materials in the top menu.

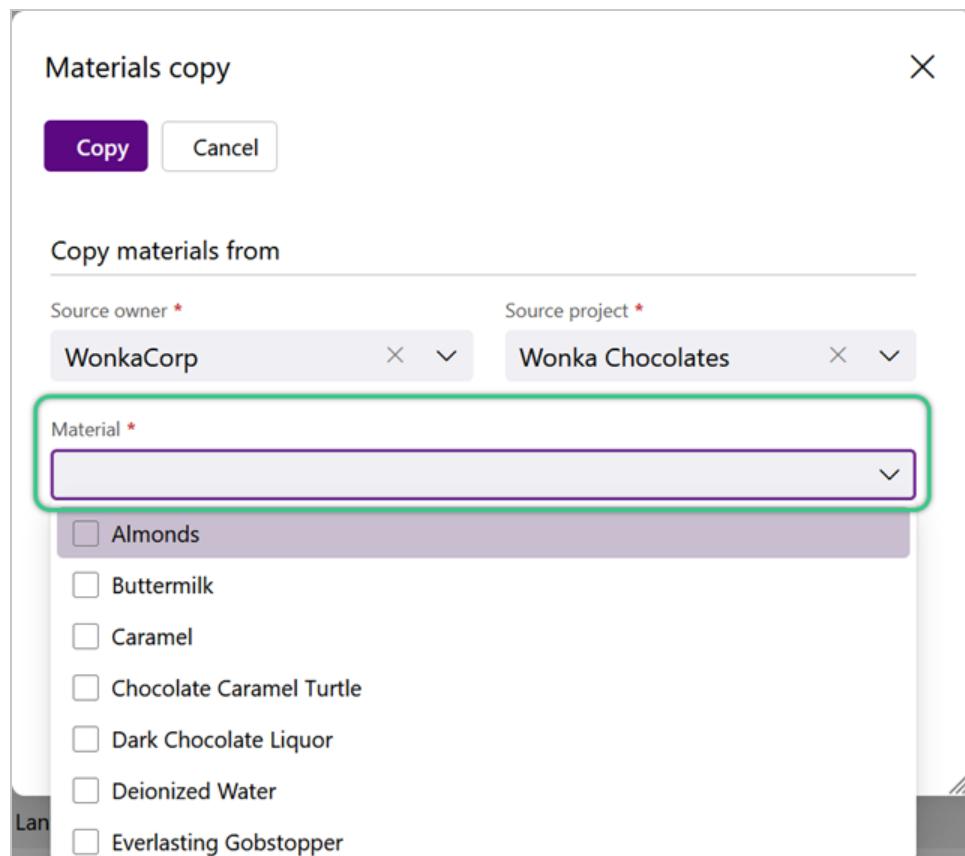
The screenshot shows the Materials hub interface after clicking the 'Copy materials' button in the top menu. The 'Copy materials' button is now highlighted with a green border. The rest of the interface remains the same, displaying the 'Materials hub' title, configuration options, filters, and a list of materials. The material list table shows two items: Almonds and Buttermilk, both from the Wonka Chocolates catalog.

Material	Owner	Project	Source catalog	Total primary
Almonds	WonkaCorp	Wonka Chocolates		2
Buttermilk	WonkaCorp	Wonka Chocolates		1

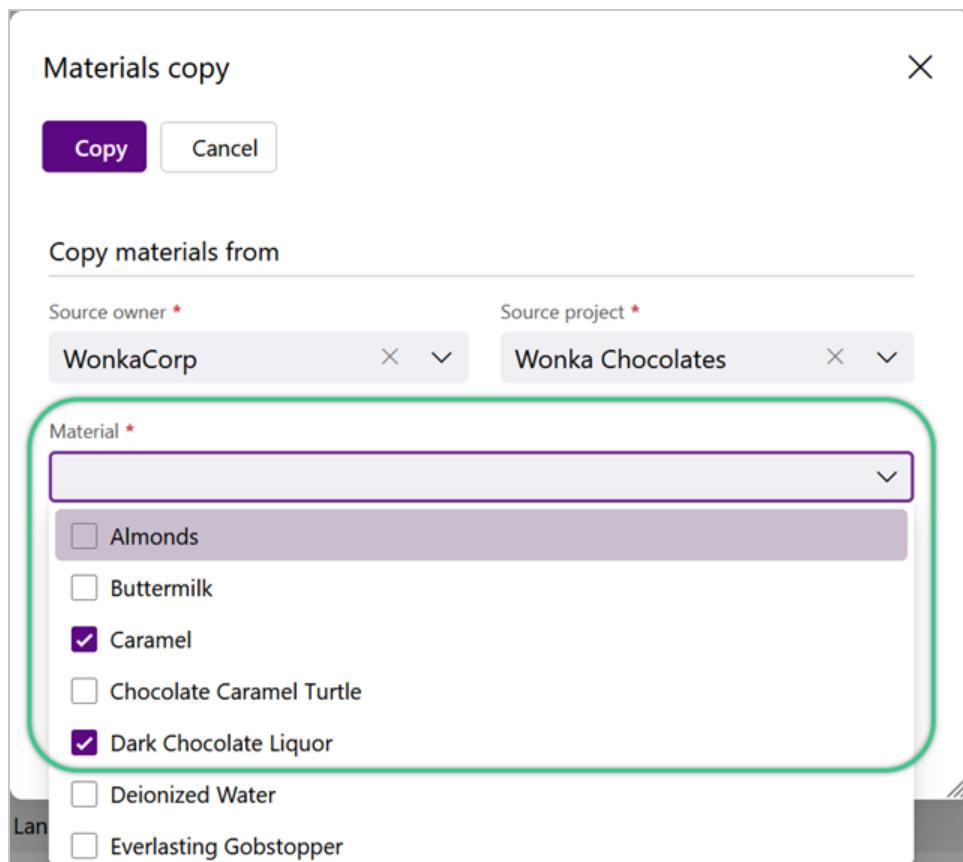
2. In the **Copy Material** window, select the required **Source Owner** and **Source Project** of the material(s) to be copied.



3. Click in the **Material** field to open the list of materials from the Source Owner and Project.



4. Check the box(es) for the material(s) to be copied.



5. Tab out of the **Material** field and verify that the necessary material(s) are displayed.

Materials copy X

**Copy** **Cancel**

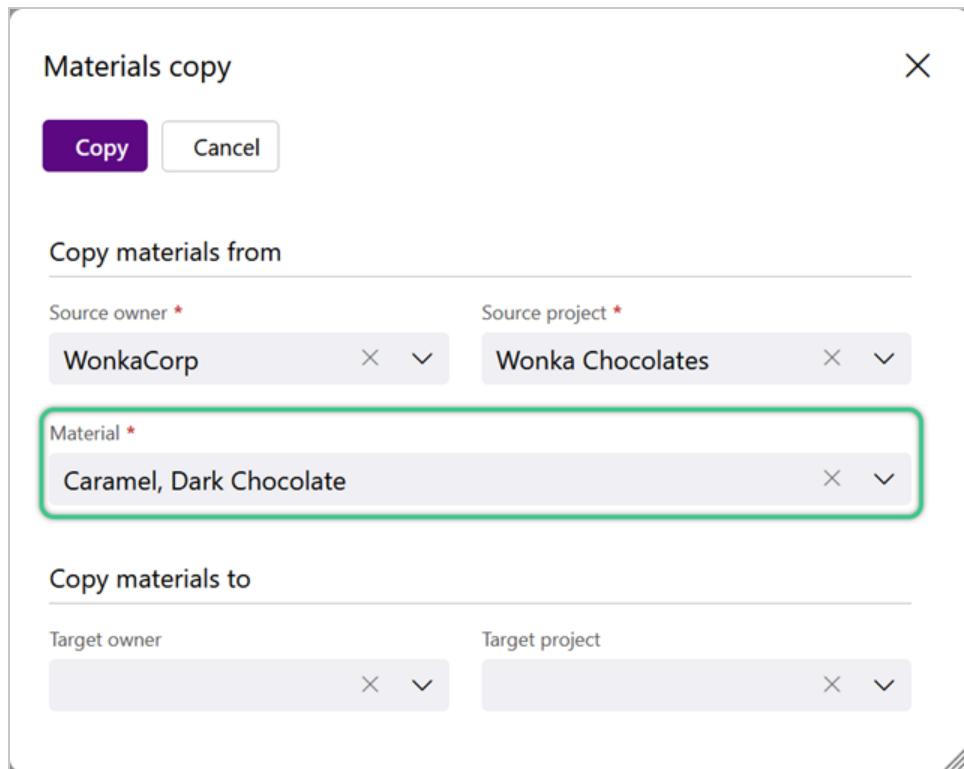
Copy materials from

Source owner \* WonkaCorp X ▾      Source project \* Wonka Chocolates X ▾

Material \* Caramel, Dark Chocolate X ▾

Copy materials to

Target owner X ▾      Target project X ▾



6. Select the **Target Owner** and **Target Project** to which the material(s) will be copied.

Materials copy X

**Copy** **Cancel**

**Copy materials from**

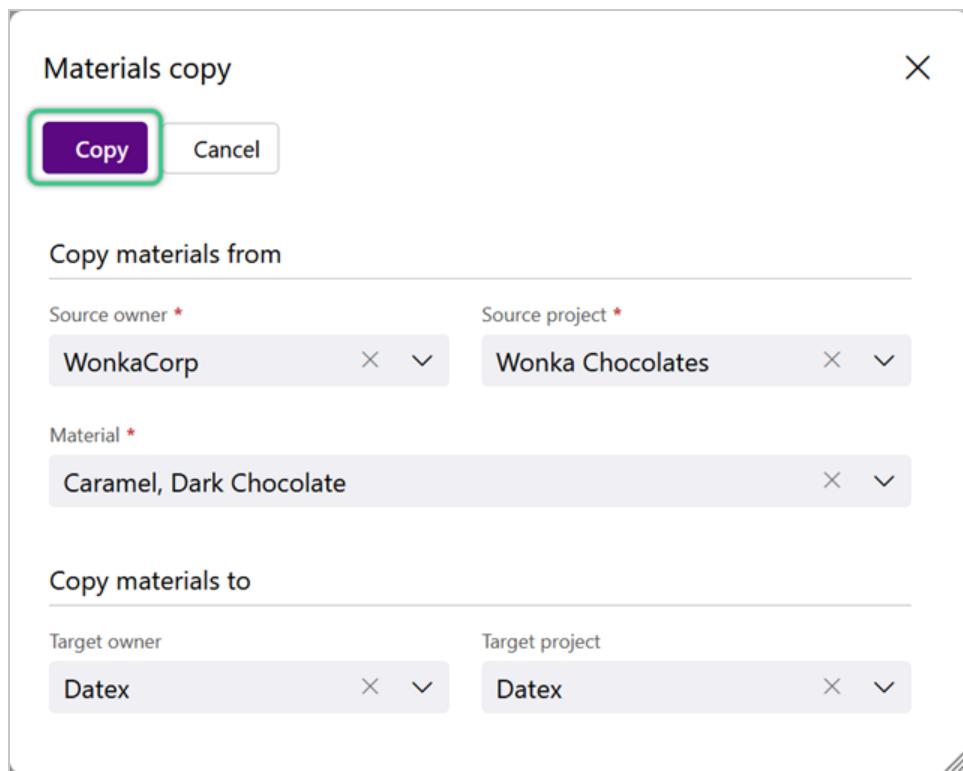
Source owner \* WonkaCorp X ▾      Source project \* Wonka Chocolates X ▾

Material \* Caramel, Dark Chocolate X ▾

**Copy materials to**

Target owner Datex X ▾      Target project Datex X ▾

7. Click the blue **Confirm** button to copy the materials from the source to the target.



The copied materials will now appear in the **Materials Hub** when filtering by the Target Owner and Project.

# Set Up a Material

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

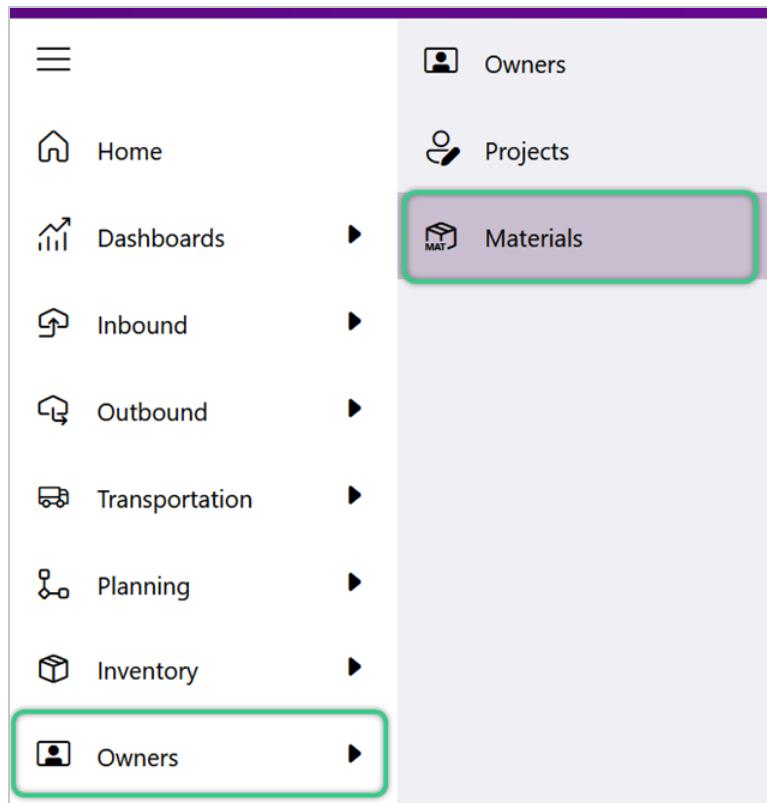
## ✖ Prerequisites

- [Owner](#)
- [Project](#)
- [Packaging](#)

## Step 1. Create a New Material

### Step 1. Open the Materials Hub

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



The Materials Hub will display.

The screenshot shows the Materials hub interface. At the top, there are navigation links: '+ New material', 'Import materials', 'Copy materials', 'Packages', and 'Material catalogs'. A large digital badge on the right displays 'Total materials 16'. Below this, a section titled 'Materials hub' contains a 'Filters' dropdown set to 'Owner: WonkaCorp' and 'Project: Wonka Chocolates'. A 'Custom fields' link is also present. The main area is titled 'Materials' and shows a table with 16 items. The columns include Material, Owner, Project, Source catalog, Total primary pick count, Total primary pick sum, Total non primary pick sum, Lot controlled, Serial controlled, and Fixed weight. The table lists four materials: Almonds, Buttermilk, Caramel, and Chocolate Caramel Turtle, all owned by WonkaCorp and part of the Wonka Chocolates project.

Material	Owner	Project	Source catalog	Total primary pick count	Total primary pick sum	Total non primary pick sum	Lot controlled	Serial controlled	Fixed weight
Almonds	WonkaCorp	Wonka Chocolates		2	63		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Buttermilk	WonkaCorp	Wonka Chocolates		1	5	38256.5	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Caramel	WonkaCorp	Wonka Chocolates		0	0	6091	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Chocolate Caramel Turtle	WonkaCorp	Wonka Chocolates		2	2272.000001	14134.80246122	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

## Step 2. Create the New Material

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

This screenshot shows the Materials hub interface with the '+ New material' button highlighted in green. The rest of the interface is identical to the previous one, displaying the 'Materials hub' section with filters, a 'Custom fields' link, and a table of materials. The table shows two entries: Almonds and Buttermilk, both owned by WonkaCorp and part of the Wonka Chocolates project.

Material	Owner	Project	Source catalog	Total primary
Almonds	WonkaCorp	Wonka Chocolates		2
Buttermilk	WonkaCorp	Wonka Chocolates		1

The **New Material** window will display.

### New material

**Save**   **Cancel**

Material code *	Name
<input type="text"/>	<input type="text"/>
Description *	
<input type="text"/>	
Owner *	Project *
<input type="text"/> X ▾	<input type="text"/> X ▾
Packaging *	UPC code
<input type="text"/> X ▾	<input type="text"/>
Group *	
<input type="text"/> X ▾	
Configuration	
Measurements	
Storage rules	

### Step 3. Enter Material Basics

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

**Note**

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

New material X

Save Cancel

Material code *	Name
Wonka Bar	Wonka Bar
Description *	
Owner *	Project *
▼	▼
Packaging *	UPC code
▼	▼
Group *	
100#+ > Salmon <span style="float: right;">X</span> <span style="border: 1px solid #ccc; border-radius: 4px; padding: 0 2px;">▼</span>	

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

New material X

Save Cancel

Material code *	Name
Wonka Bar	Wonka Bar
<b>Description *</b> Wonka Chocolate Bar	
Owner *	Project *
▼	▼
Packaging *	UPC code
▼	▼
<b>Group *</b> 100#+ > Salmon <span style="float: right;">X</span> <span style="border: 1px solid #ccc; padding: 0 5px;">▼</span>	

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

New material X

**Save** **Cancel**

Material code *	Name
Wonka Bar	Wonka Bar
Description *	
Wonka Chocolate Bar	
Owner *	Project *
WonkaCorp	Wonka Chocolates
Packaging *	UPC code
Group *	
100#+ > Salmon	

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

New material X

Save Cancel

Material code *	Name
<input type="text" value="Wonka Bar"/>	<input type="text" value="Wonka Bar"/>
Description *	
<input type="text" value="Wonka Chocolate Bar"/>	
Owner *	Project *
<input type="text" value="WonkaCorp"/> <span style="font-size: small;">X ▾</span>	<input type="text" value="Wonka Chocolates"/> <span style="font-size: small;">X ▾</span>
Packaging *	UPC code
<input type="text" value="box1"/> <span style="font-size: small;">X ▾</span>	<input type="text" value="3362641694"/>
Group *	
<input type="text" value="100#+ &gt; Salmon"/> <span style="font-size: small;">X ▾</span>	

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

New material X

**Save** **Cancel**

Material code *	Name
Wonka Bar	Wonka Bar
Description *	
Wonka Chocolate Bar	
Owner *	Project *
WonkaCorp	Wonka Chocolates
Packaging *	UPC code
box1	3362641694
Group *	
BGPackedFood	
Configuration	

**Step 4. Configure the Material**

The **Allocation Strategy** takes into account related material information when creating Pick Slips for Outbound Shipments. This allows Inventory to be selected to Ship based on set preferences. For example, First Expired, First Out (FEFO) and First In, First Out (FIFO).

## 1. Select a required Allocation Strategy.

### Allocation Strategies

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

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

### Tip

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

New material X

**Save** **Cancel**

Group \*

BGPackedFood X ▾

**Configuration** ^

Allocation strategy \*

FIFO Lot With Requested Packag... X ▾

Track lots  Track serials

**Measurements** ^

Decimal precision

1 decimal place X ▾

Fixed weight

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

### New material

SaveCancel

Group \*

BGPackedFood X V

Configuration

Allocation strategy \*

FIFO Lot With Requested Packag... X V

Track lots Track serials

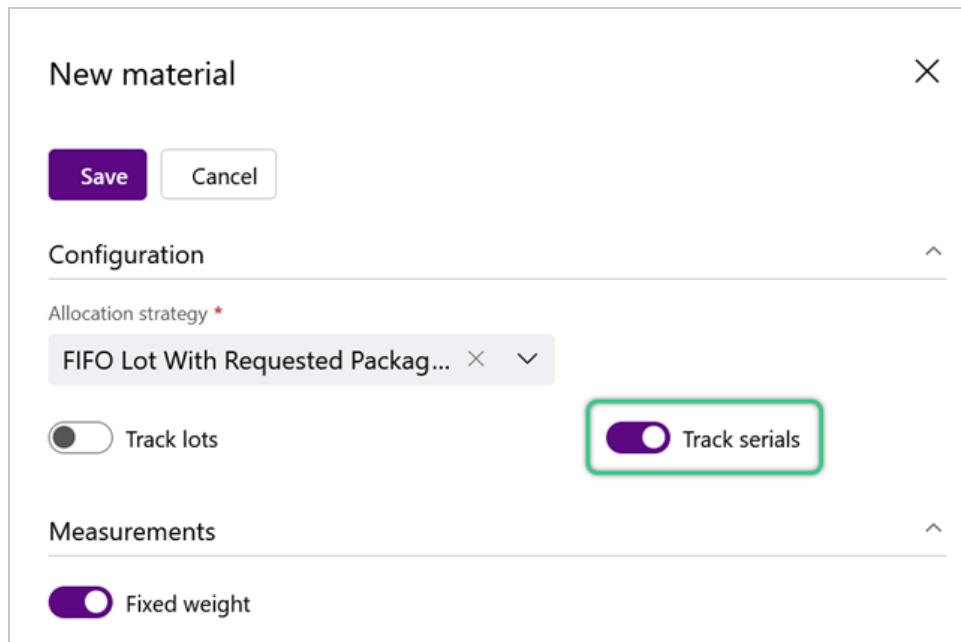
Measurements

Decimal precision

V

Fixed weight

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



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

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

### New material

**Save** **Cancel**

Group \*

BGPackedFood

Configuration

Allocation strategy \*

FIFO Lot With Requested Packag...

Track lots    Track serials

Measurements

Decimal precision

1 decimal place

Fixed weight

## Step 5. Enter Material Measurements

### Warning

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

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

### New material

SaveCancel

#### Measurements

Decimal precision  
1 decimal place X ▼

Fixed weightWeight \*1.00Shipping weight \*1.00

Weight measure \*lbX▼

Fixed volume

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

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

New material X

Save Cancel

**Measurements**

Fixed weight

Weight *	Shipping weight *
<input type="text" value="100.00"/>	<input type="text" value="100.00"/>

Weight measure \*

× ▼

Fixed volume

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

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

New material X

Save Cancel

**Measurements** ^

Fixed weight

Weight \* 100.00 Shipping weight \* 100.00

Weight measure \* g x v

Fixed volume

Volume \* 10.30 Shipping volume \* 10.30

Volume measure \* cu. in. x v

Fixed dimensions

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

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

New material X

Save Cancel

**Measurements** ^

Fixed weight

Weight \* 100.00 Shipping weight \* 100.00

Weight measure \* g X ▼

Fixed volume

Volume \* 10.30 Shipping volume \* 10.30

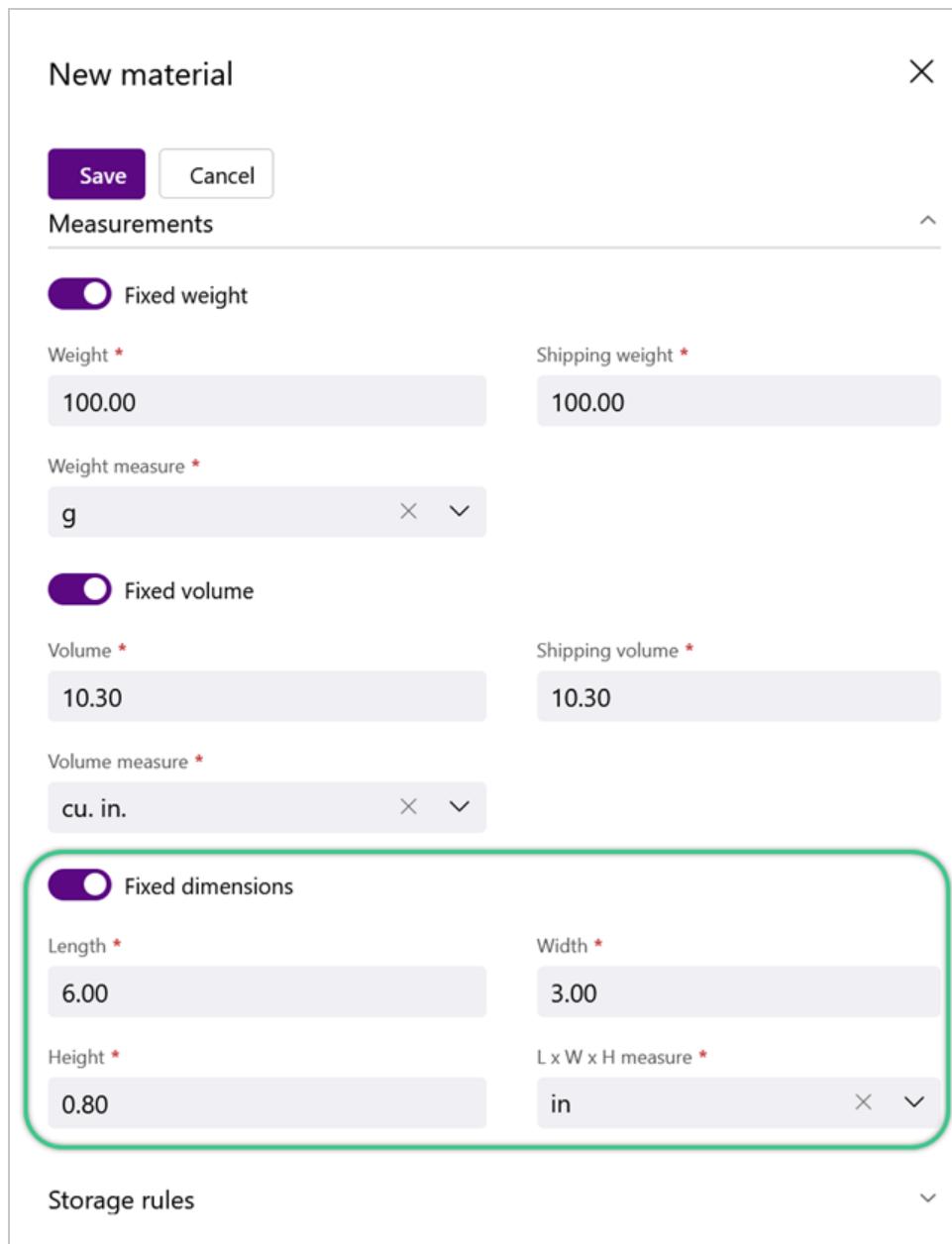
Volume measure \* cu. in. X ▼

Fixed dimensions

Length \* 6.00 Width \* 3.00

Height \* 0.80 L x W x H measure \* in X ▼

Storage rules ▼



## Step 6. Set Material Storage Rules

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

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

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

New material X

Save Cancel

Description \* Wonka Chocolate Bar

Owner \* WonkaCorp X ▾ Project \* Wonka Chocolates X ▾

Packaging \* box1 X ▾ UPC code 3362641694

Group \* BGPackedFood X ▾

Configuration ▼

Measurements ▼

Storage rules ^

Pallet high	Pallet tie
5	20

Shelf life (in days) 0 Storage category rule ▼

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

**Tip**

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

New material

Save Cancel

Description \*

Wonka Chocolate Bar

Owner \*

WonkaCorp

Project \*

Wonka Chocolates

Packaging \*

box1

UPC code

3362641694

Group \*

BGPackedFood

Configuration

Measurements

Storage rules

Pallet high

5

Pallet tie

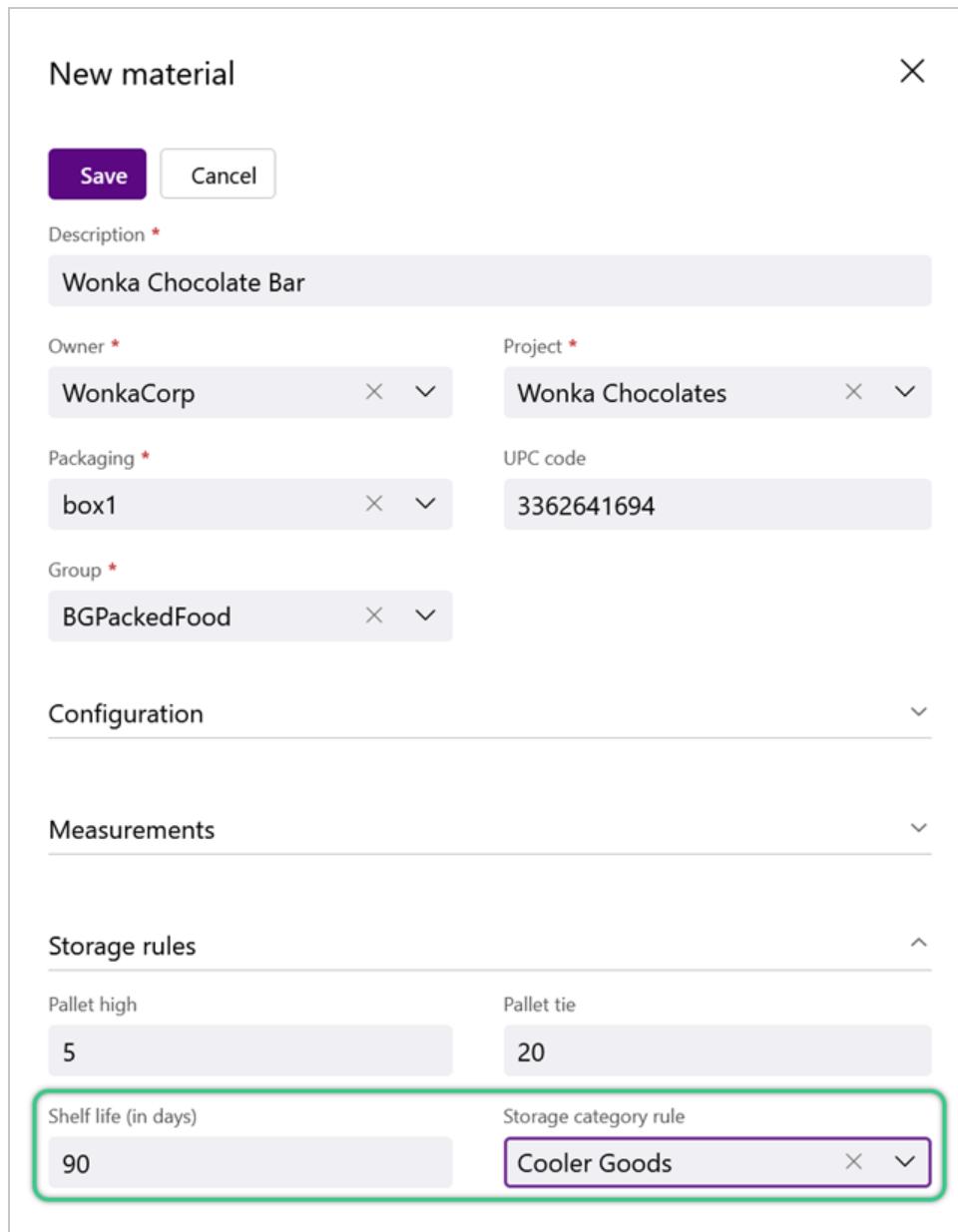
20

Shelf life (in days)

90

Storage category rule

Cooler Goods

**Step 7. Save the New Material**

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

The screenshot shows the 'New material' creation window. At the top left is a purple 'Save' button with a green rectangular border around it. To its right is a 'Cancel' button. Below the buttons is a 'Description \*' field containing 'Wonka Chocolate Bar'. Underneath are 'Owner \*' and 'Project \*' fields, both set to 'WonkaCorp' and 'Wonka Chocolates' respectively. The 'Packaging \*' field contains 'box1'. In the 'UPC code' field, the number '3362641694' is entered. The 'Group \*' field contains 'BGPackedFood'. Below these fields are three expandable sections: 'Configuration' (with a downward arrow), 'Measurements' (with a downward arrow), and 'Storage rules' (with an upward arrow). The entire window has a light gray background and a white header bar.

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

The new material is now available for further setup. For comprehensive setup options, please visit the [Setup a Material](#) tutorial.

## Step 2. Open the Material Record

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

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

The screenshot shows the Materials hub interface. At the top, there are navigation links: 'New material' (green plus icon), 'Import materials' (down arrow icon), 'Copy materials' (copy icon), 'Packages' (package icon), and 'Material catalogs' (catalog icon). Below the header, the title 'Materials hub' is displayed, followed by the subtitle 'Configure materials and their packaging.' A 'Filters' section is present. Under the filters, there is a link 'Custom fields'. The main area is divided into two tabs: 'Materials' (underlined) and 'Materials packagings'. Below the tabs are three buttons: 'Edit' (pencil icon), 'Delete' (trash icon), and 'Export' (file icon). A table lists the materials:

	Material	Owner	Project	Source catalog	Total primary
<input type="checkbox"/>	Almonds	WonkaCorp	Wonka Chocolates	2	
<input type="checkbox"/>	Chocolate Caramel Turtle	WonkaCorp	Wonka Chocolates	2	
<input type="checkbox"/>	Chocolate Caramel Turtle Undecorated	WonkaCorp	Wonka Chocolates	0	
<input type="checkbox"/>	Everlasting Gobstopper	WonkaCorp	Wonka Chocolates	0	
<input type="checkbox"/>	Fizzy Lifting Drink	WonkaCorp	Wonka Chocolates	0	

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

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

#### Note

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

### Step 1. Open the Material Edit Window

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



## Step 2. Edit Material Basics

1. Update any of the following basic details:

- Material Code
- Name
- Description
- Status
- Group

The screenshot shows an "Edit material" dialog box. It contains fields for "Material code" (Everlasting Gobstopper), "Name" (Everlasting Gobstopper), "Description" (Everlasting Gobstopper), "Status" (Active), and "Material group" (No Material Group). There are "Save" and "Cancel" buttons at the top left.

Edit material	
Material code	Everlasting Gobstopper
Name	Everlasting Gobstopper
Description	Everlasting Gobstopper
Status	Active
Material group	No Material Group

## Step 3. Edit Configuration Details

1. Update any of the following **Configuration** details:

- Lot Controlled
- Serial Controlled
- Fixed Weight
- Allocation Strategy
- Storage Category Rule
- Shelf Life
- Minimum Dating Span
- Skip Inventory Count
- Skip Count Back
- Scan All Packagings
- Allow Receiving

Edit material X

Save Cancel

**Configuration** ^

<p>Lot controlled <input checked="" type="checkbox"/></p> <p>Fixed dimension <input checked="" type="checkbox"/></p> <p>Allocation strategy * <input type="text"/></p> <p>Shelf life (in days) <input type="text" value="0"/></p> <p><input type="checkbox"/> Skip inventory count</p> <p><input type="checkbox"/> Scan all packagings</p>	<p>Serial controlled <input checked="" type="checkbox"/></p> <p>Fixed weight <input type="checkbox"/></p> <p>Storage category rule <input type="text"/></p> <p>Minimum dating span <input type="text" value="0"/></p> <p><input type="checkbox"/> Skip count back</p> <p><input checked="" type="checkbox"/> Allow receiving</p>
--	--

**Step 4. (Optional) Edit Manufacturing Settings**

1. Update any of the following **Manufacturing** settings:

- Material Type
- Allowed Time Outside Storage
- Production Rate
- Required Crew Size
- Use Oldest Expiry Date
- Skip Auto-Creation of Move Tasks
- Enable Packaging Review
- Set Packaging Review Reminder
- Review New Packaging Type After (in Days)

Edit material X

Save Cancel

**Manufacturing** ^

Material type	Allowed time outside storage
<input style="width: 100%; height: 30px; border: 1px solid #ccc; border-radius: 4px;" type="text"/>	<input style="width: 100%; height: 30px; border: 1px solid #ccc; border-radius: 4px;" type="text"/>
Production rate	Required crew size
<input style="width: 100%; height: 30px; border: 1px solid #ccc; border-radius: 4px;" type="text"/>	<input style="width: 100%; height: 30px; border: 1px solid #ccc; border-radius: 4px;" type="text"/>

Use oldest expiry date

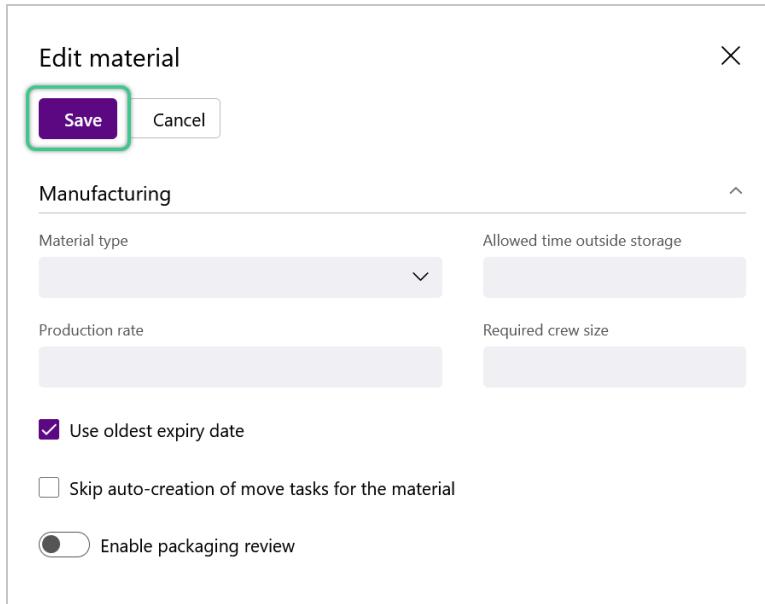
Skip auto-creation of move tasks for the material

Enable packaging review

**Step 5. Save the updated Material**

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

The Material is now ready for use as Inventory.



**Edit material**

**Manufacturing**

Material type	Allowed time outside storage
Production rate	Required crew size

Use oldest expiry date

Skip auto-creation of move tasks for the material

Enable packaging review

## Step 4. Select Packagings

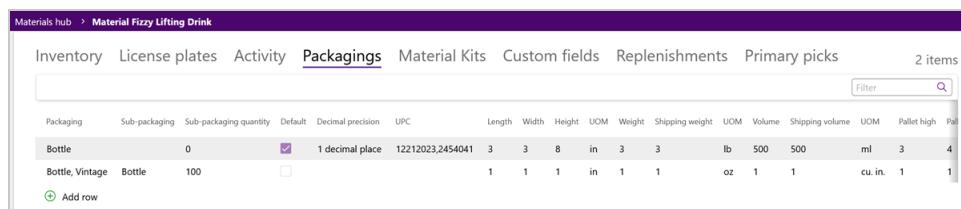
Now that we've entered the basics, let's move on to the **Packagings** tab, where we will select our Packaging. Add as many levels of Packaging as are needed.

### Note

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

## Step 1. Add Base Packaging

1. Click the **Packagings** tab.



Packaging	Sub-packaging	Sub-packaging quantity	Default	Decimal precision	UPC	Length	Width	Height	UOM	Weight	Shipping weight	UOM	Volume	Shipping volume	UOM	Pallet height	Pallet width
Bottle	0	<input checked="" type="checkbox"/>	1 decimal place	12212023.2454041	3	3	8	in	3	3	lb	500	500	ml	3	4	
Bottle, Vintage	Bottle	100	<input type="checkbox"/>		1	1	1	in	1	1	oz	1	1	cu.in.	1	1	

[Add row](#)

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

Packaging	Sub-packaging	Sub-packaging quantity	Default	Decimal precision	UPC	Length	Width	Height	UOM	Weight	Shipping weight	UOM	Volume	Shipping volume	UOM	Pallet height	Pal
Bottle		0	<input checked="" type="checkbox"/>	1 decimal place	12212023,2454041	3	3	8	in	3	3	lb	500	500	ml	3	4
Bottle, Vintage	Bottle	100	<input type="checkbox"/>			1	1	1	in	1	1	oz	1	1	cu. in.	1	1
<a href="#">+ Add row</a>																	

3. Enter the Base Packaging details.

For more information about these Packaging Details, please visit the [Materials Guide](#).

Packaging	Sub-packaging	Sub-packaging quantity	Default	Decimal precision	UPC	Length	Width	Height	UOM
Bottle		0	<input checked="" type="checkbox"/>	1 decimal place	12212023,2454041	3	3	8	in
Bottle, Vintage	Bottle	100	<input type="checkbox"/>			1	1	1	in
<a href="#">+ Add row</a>									

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

Packaging	Sub-packaging	Sub-packaging quantity	Default	Decimal precision	UPC	Length	Width	Height	UOM
Bottle		0	<input checked="" type="checkbox"/>	1 decimal place	12212023,2454041	3	3	8	in
Bottle, Vintage	Bottle	100	<input type="checkbox"/>			1	1	1	in
<a href="#">+ Add row</a>									

## Step 2. (Optional) Add Sub-Packaging

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

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

Packaging	Sub-packaging	Sub-packaging quantity	Default	Decimal precision	UPC	Length	Width	Height	UOM
Bottle		0	<input checked="" type="checkbox"/>	1 decimal place	122120232454041	3	3	8	in
Bottle, Vintage	Bottle	100	<input type="checkbox"/>			1	1	1	in

## Step 5. Create Inventory

### Step 1. Open the Material Inventory Window

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

Materials hub > Material Everlasting Gobstopper

+ Create inventory

Material Everlasting Gobstopper  
Status Active

Everlasting Gobstopper

### Step 2. Enter Inventory Details

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

The screenshot shows the 'Create Inventory' dialog box. At the top, there are three buttons: 'Confirm and close' (blue), 'Confirm and new' (light blue), and 'Cancel'. Below the buttons, the 'Owner \*' field contains 'WonkaCorp' and the 'Project \*' field contains 'Wonka Chocolates', both highlighted with a green border. There are also fields for 'Warehouse \*', 'Material \*', 'Packaging \*', 'Quantity \*', and 'Reason Code \*'.

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

The screenshot shows the 'Create Inventory' dialog box. The 'Owner \*' field contains 'WonkaCorp' and the 'Project \*' field contains 'Wonka Chocolates'. The 'Warehouse \*' field contains 'Tampa' and the 'Material \*' field contains 'Fizzy Lifting Drink', both highlighted with a green border. There are also fields for 'Packaging \*', 'Quantity \*', 'Location \*', and 'Reason Code \*'.

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

Create Inventory

**Confirm and close** **Confirm and new** **Cancel**

Owner *	Project *
WonkaCorp	Wonka Chocolates
Warehouse *	Material *
Tampa	Fizzy Lifting Drink
Packaging *	Quantity *
Bottle, Vintage	200
Location *	Reason Code *

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

Create Inventory

**Confirm and close** **Confirm and new** **Cancel**

Owner *	Project *
WonkaCorp	Wonka Chocolates
Warehouse *	Material *
Tampa	Fizzy Lifting Drink
Packaging *	Quantity *
Bottle, Vintage	200
Location *	<input checked="" type="checkbox"/> New License Plate?
Rec Dock	
License Plate *	Reason Code *

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

Create Inventory

**Confirm and close** **Confirm and new** **Cancel**

Owner *	Project *
WonkaCorp	Wonka Chocolates
Warehouse *	Material *
Tampa	Fizzy Lifting Drink
Packaging *	Quantity *
Bottle, Vintage	200
Location *	<input checked="" type="checkbox"/> New License Plate?
Rec Dock	
License Plate *	Reason Code *
LP01182401	Reason123

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

Create Inventory

**Confirm and close** **Confirm and new** **Cancel**

Owner *	Project *
WonkaCorp	Wonka Chocolates
Warehouse *	Material *
Tampa	Fizzy Lifting Drink
Packaging *	Quantity *
Bottle, Vintage	200
Location *	<input checked="" type="checkbox"/> New License Plate?
Rec Dock	
License Plate *	Reason Code *
LP01182401	Reason123

### Step 3. Save the New Inventory

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

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

The screenshot shows the 'Create Inventory' dialog box. At the top, there are three buttons: 'Confirm and close' (highlighted with a green border), 'Confirm and new', and 'Cancel'. Below these are several input fields with dropdown arrows:

- Owner \***: WonkaCorp
- Project \***: Wonka Chocolates
- Warehouse \***: Tampa
- Material \***: Fizzy Lifting Drink
- Packaging \***: Bottle, Vintage
- Quantity \***: 200
- Location \***: Rec Dock
- License Plate \***: LP01182401
- Reason Code \***: Reason123

A toggle switch labeled 'New License Plate?' is turned on. The 'Confirm and close' button is highlighted with a green border.

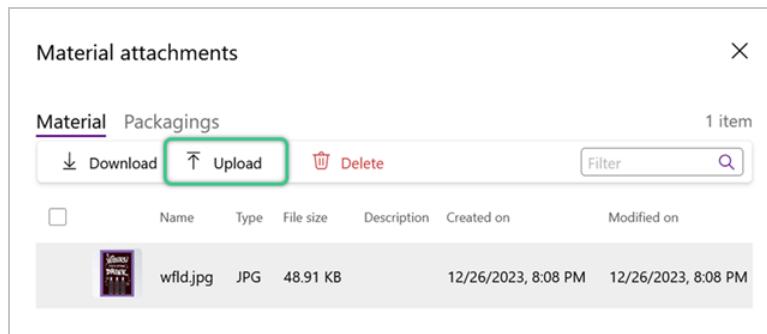
### Step 6. (Optional) Add Attachments, Images

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

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

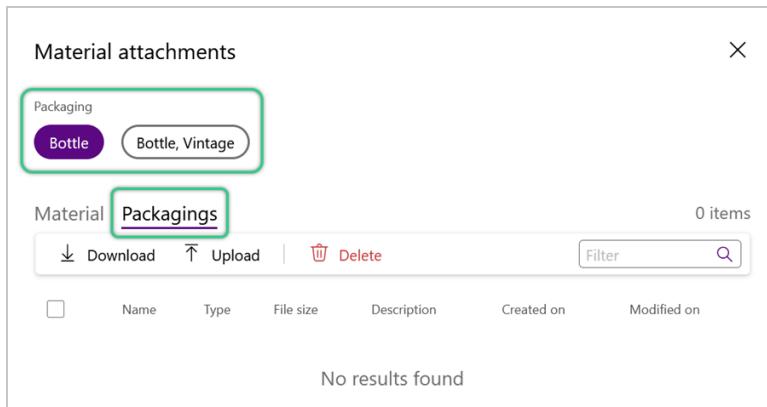


2. In the Material Attachments window, if the attachment is for a Material, click the **Upload** option on the **Material** tab.



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

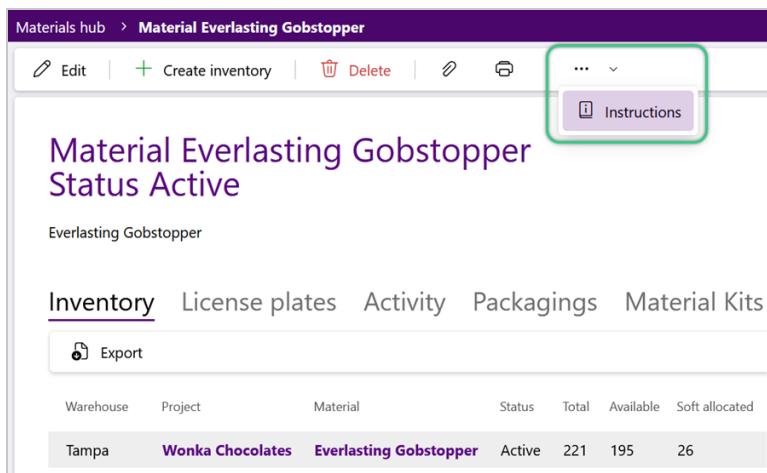
This assists in picking and packing when it may be confusing to a user whether an item is an each, case, pack, bundle, etc.



## Step 7. (Optional) Set up Instructions

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

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



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

The screenshot shows a table header with columns: Type (checkbox), Instruction (dropdown), URL (text input), Enabled (checkbox), Created on, Created by, Modified on, and Modified by. Below the header, a message says 'No results found'. At the bottom left, there is a green button labeled 'Add row' with a plus sign icon, which is highlighted with a green box.

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

The screenshot shows the same table structure as the previous screenshot. A new row has been added with the following values: Type (checkbox checked), Instruction (dropdown set to 'Inspection'), URL (empty text input), Enabled (checkbox checked). The rest of the columns are empty. The 'Add row' button at the bottom is no longer highlighted.

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

The screenshot shows the same table structure. The 'Enabled' checkbox for the 'Inspection' row is checked. The '...' button at the end of the row is highlighted with a green box. The 'Add row' button at the bottom is no longer highlighted.

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

### Step 8. (Optional) Assign Containers

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

Materials hub > Material Everlasting Gobstopper

Edit | Create inventory | Delete |

## Material Everlasting Gobstopper Status Active

Everlasting Gobstopper

Inventory type

By Location | By LP | By Lot | **By Material**

**Assign containers**

Material substitutions

Material aliases

Inventory License plates Activity Packagings Material Kits

Export

Warehouse	Project	Material	Status	Total	Available	Soft allocated
Tampa	Wonka Chocolates	Everlasting Gobstopper	Active	221	195	26
CheeseOps	Wonka Chocolates	Everlasting Gobstopper	Active	110	110	0

2. In the Container Assignment window, click to **Browse Containers**, or click the green + Add Row option to create a new one.

Container Assignment Grid

**Browse containers** Unassign

0 items

Name \* Description Length Width Height Dimension uom Weight capacity Weight uom CatchAll

No results found

+ Add row

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

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

Container Assignment Grid								
<input type="button" value="Browse containers"/>		<input type="button" value="Unassign"/> <input type="button" value="Filter"/> <input type="text"/>						
<input type="checkbox"/>	Name *	Description	Length	Width	Height	Dimension uom	Weight capacity	Weight uom
<input type="checkbox"/>	Large Box	Large Box	23	17	12	in	30	lb <input type="checkbox"/>
<input type="button" value="Add row"/>								

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

Container Assignment Grid								
<input type="button" value="Browse containers"/>		<input type="button" value="Unassign"/> <input type="button" value="Filter"/> <input type="text"/>						
<input type="checkbox"/>	Name *	Description	Length	Width	Height	Dimension uom	Weight capacity	Weight uom
<input checked="" type="checkbox"/>	Large Box	Large Box	23	17	12	in	30	lb <input type="checkbox"/>
<input type="button" value="Add row"/>								

## Step 9. (Optional) Setup Substitutions

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

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

Materials hub > Material Everlasting Gobstopper

Everlasting Gobstopper

Inventory type

By Location By LP By Lot By Material

Assign containers

Material substitutions

Material aliases

Inventory License plates Activity Packagings Material Kits

Export

Warehouse	Project	Material	Status	Total	Available	Soft allocated
Tampa	Wonka Chocolates	Everlasting Gobstopper	Active	221	195	26
CheeseOps	Wonka Chocolates	Everlasting Gobstopper	Active	110	110	0

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

Substitutions for Fizzy Lifting Drink - Fizzy Lifting Drink

Material packaging

Bottle

Substitutions

0 items

Delete Filter

No results found

Add row

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

Substitutions for Fizzy Lifting Drink - Fizzy Lifting Drink

Material packaging

Bottle

**Substitutions**

0 items

Delete Filter Search

<input type="checkbox"/> Substitute *	Packaging *	Ratio *	Priority
No results found			

+ Add row

### Step 10. (Optional) Add Aliases

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

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

Materials hub > Material Everlasting Gobstopper

Edit | Create inventory | Delete | Print | Edit | View

**Material Everlasting Gobstopper**  
Status Active

Everlasting Gobstopper

Inventory type

By Location By LP By Lot By Material

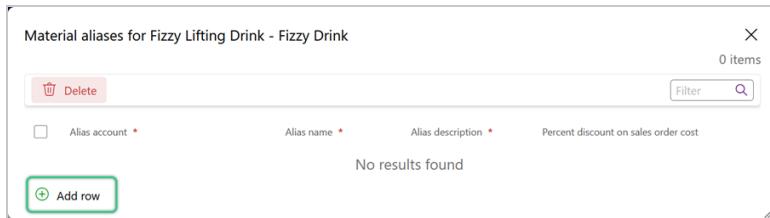
☰ Assign containers 🔗 Material substitutions ✍ Material aliases

Inventory License plates Activity Packagings Material Kits

Export

Warehouse	Project	Material	Status	Total	Available	Soft allocated
Tampa	Wonka Chocolates	Everlasting Gobstopper	Active	221	195	26
CheeseOps	Wonka Chocolates	Everlasting Gobstopper	Active	110	110	0

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



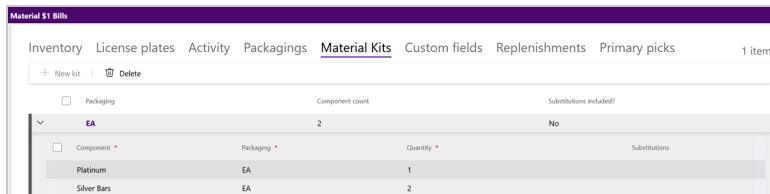
## Step 11. (Optional) Create a Kit

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

### Example

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

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



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



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

Kit for Everlasting Gobstopper - Everlasting Gobstopper (EA)

**Kit components**

0 items

+ Add substitute | Delete Filter

Component *	Packaging *	Quantity *	Substitutions
No results found			

+ Add row

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

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

Kit for Everlasting Gobstopper - Everlasting Gobstopper (EA)

**Kit components**

0 items

+ Add substitute | Delete Filter

Component *	Packaging *	Quantity *	Substitutions
No results found			

+ Add row

## Step 12. (Optional) Enter Custom Field Details

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

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

Materials hub > Material Everlasting Gobstopper

Inventory License plates Activity Packagings Material Kits **Custom fields** Serial numbers Replenishments Primary picks

Filter

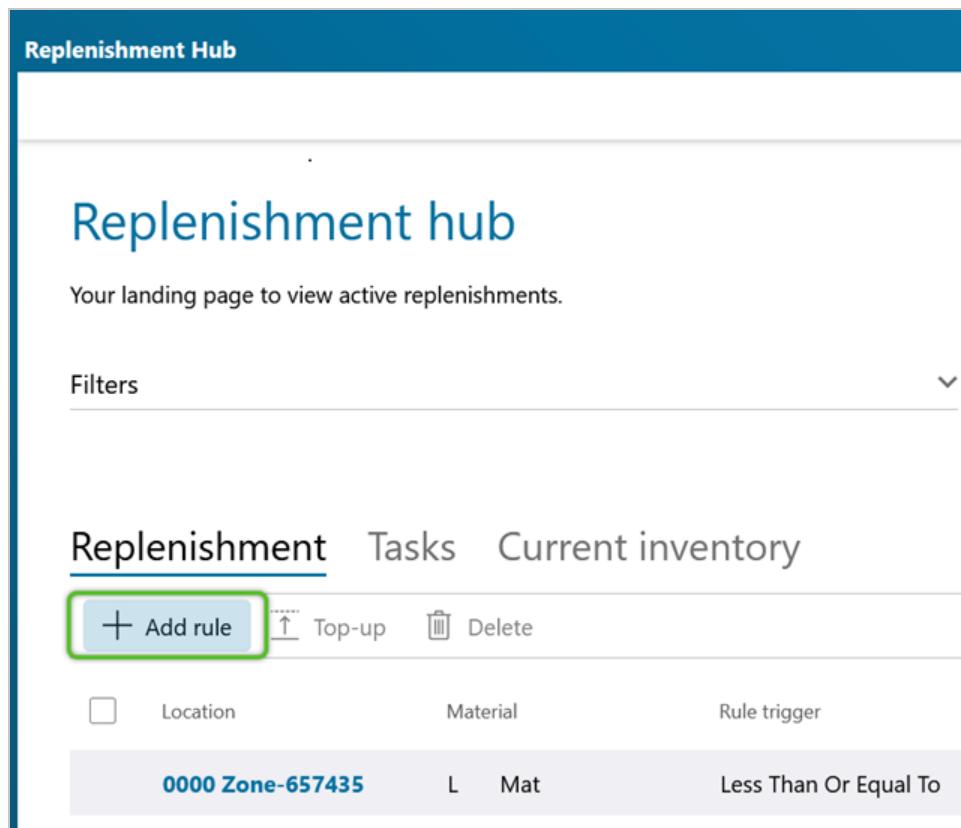
Project	Material	Description
Wonka Chocolates	Everlasting Gobstopper	Everlasting Gobstopper

### Step 13. (Optional) Add Replenishment Rules

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

#### Step 1. Open the Replenishment Rule Window

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



The screenshot shows the 'Replenishment hub' interface. At the top, there is a header bar with the title 'Replenishment Hub'. Below it, the main title 'Replenishment hub' is displayed in blue. A subtitle 'Your landing page to view active replenishments.' follows. On the left, there is a 'Filters' section with a dropdown arrow. The main content area has tabs for 'Replenishment' (which is underlined), 'Tasks', and 'Current inventory'. Below these tabs is a toolbar with buttons for '+ Add rule' (which is highlighted with a green box), 'Top-up', and 'Delete'. Underneath the toolbar, there are three columns: 'Location' (with a checkbox), 'Material' (with a dropdown menu showing 'L Mat'), and 'Rule trigger' (with a dropdown menu showing 'Less Than Or Equal To').

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

### Create new rule

**Create rule**   **Discard**

#### Replenishment Information

Location \*

Owner \*

Project \*

Minimum Quantity \*

Minimum Packaging \*

Replenish by quantity

#### Rule Trigger

Trigger if \*

## Step 2. Enter the Replenishment Details

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

### Create new rule

[Create rule](#) [Discard](#)

#### Replenishment Information

Location \*

0000Chocolate

Owner \*

Project \*

Minimum Quantity \*

Minimum Packaging \*

Replenish by quantity

#### Rule Trigger

Trigger if \*

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

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

### Create new rule

**Create rule** **Discard**

#### Replenishment Information

Location \*

0000Chocolate X V

Material \*

Fizzy Lifting Drink X V

Minimum Quantity \*

10.0

Minimum Packaging \*

Bottle, Vintage X V

Replenish by quantity

#### Rule Trigger

Trigger if \*

Triggered by the System

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

Create new rule X

Create rule Discard

Location \* X ▼  
0000Chocolate

Material \* X ▼  
Fizzy Lifting Drink

Minimum Quantity \* X ▼  
10.0

Minimum Packaging \* X ▼  
Bottle, Vintage

Replenish by quantity

Replenishment Quantity \* 50.0

Replenishment Packaging \* Bottle, Vintage X ▼

Maximum Quantity

Maximum Packaging ▼

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

Create new rule X

Create rule Discard

Location \* X ▼  
0000Chocolate

Material \* X ▼  
Fizzy Lifting Drink

Minimum Quantity \* 10.0

Minimum Packaging \* X ▼  
Bottle, Vintage

Replenish by quantity

Replenishment Quantity \* 50.0

Replenishment Packaging \* X ▼  
Bottle, Vintage

Maximum Quantity 2000.0

Maximum Packaging Bottle, Vintage

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

Create new rule X

Create rule Discard

Replenish by quantity

Replenishment Quantity \*  
50.0

Replenishment Packaging \*  
Bottle, Vintage X ▼

Maximum Quantity  
2000.0

Maximum Packaging  
Bottle, Vintage X ▼

**Rule Trigger** ^

Trigger if \*

Less Than Or Equal To X ▼

Triggered by the System

Triggered On Demand

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

### Create new rule

**Create rule**   **Discard**

Replenish by quantity

Replenishment Quantity \*

Replenishment Packaging \*

 X V

Maximum Quantity

Maximum Packaging

 X V

#### Rule Trigger

Trigger if \*

**Less Than Or Equal To** X V

Triggered by the System

Triggered On Demand

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

Create new rule X

Create rule Discard

Replenish by quantity

Replenishment Quantity \*  
50.0

Replenishment Packaging \*  
Bottle, Vintage X ▼

Maximum Quantity  
2000.0

Maximum Packaging  
Bottle, Vintage X ▼

**Rule Trigger** ^

Trigger if \*  
Less Than Or Equal To X ▼

Triggered by the System

Triggered On Demand

### Step 3. Save the Replenishment Rule

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

The new Replenishment Rule will go into effect immediately.

Create new rule X

Create rule Discard

**Replenishment Information** ^

Location \* 0000Chocolate X ▼

Material \* Fizzy Lifting Drink X ▼

Minimum Quantity \* 10.0

Minimum Packaging \* Bottle, Vintage X ▼

Replenish by quantity

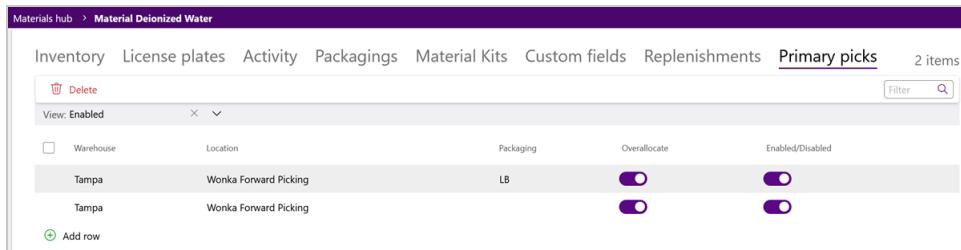
Replenishment Quantity \* 50.0

Replenishment Packaging \* Bottle, Vintage X ▼

Maximum Quantity 2000.0

**Step 14. (Optional) Set Primary Pick Locations**

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

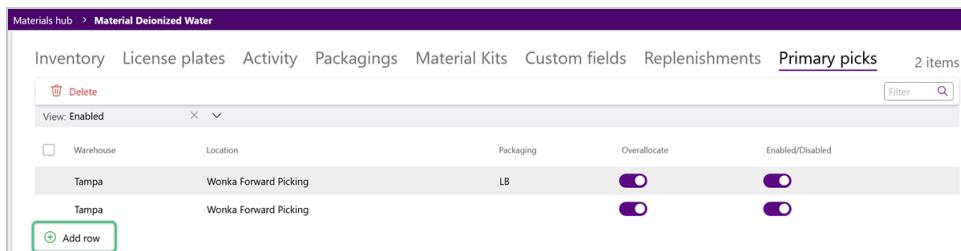


The screenshot shows the 'Primary picks' tab selected in the top navigation bar. The table displays two rows of location information:

Warehouse	Location	Packaging	Overallocate	Enabled/Disabled
Tampa	Wonka Forward Picking	LB	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Tampa	Wonka Forward Picking		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

At the bottom left, there is a green button labeled '+ Add row'.

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

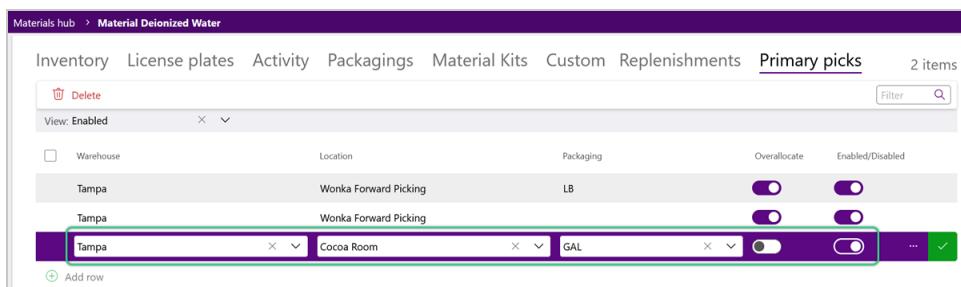


The screenshot shows the same table as above, but now it has three rows. A new row has been added at the bottom:

Warehouse	Location	Packaging	Overallocate	Enabled/Disabled
Tampa	Wonka Forward Picking	LB	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Tampa	Wonka Forward Picking		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Tampa	Cocoa Room	GAL	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

The '+ Add row' button is highlighted with a green box.

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



The screenshot shows the final state of the table with three rows. The third row has been fully populated:

Warehouse	Location	Packaging	Overallocate	Enabled/Disabled
Tampa	Wonka Forward Picking	LB	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Tampa	Wonka Forward Picking		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Tampa	Cocoa Room	GAL	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

The entire row for 'Tampa, Cocoa Room, GAL' is highlighted with a green box.

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

The screenshot shows a table with columns: Warehouse, Location, Packaging, Overallocate, and Enabled/Disabled. There are three rows of data:

Warehouse	Location	Packaging	Overallocate	Enabled/Disabled
Tampa	Wonka Forward Picking	LB	On	On
Tampa	Wonka Forward Picking	LB	On	On
Tampa	Cocoa Room	GAL	On	On

At the bottom right of the table, there is a green button with a checkmark icon, which is highlighted with a green box.

# Create a Material Catalog

---

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

## Note

---

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

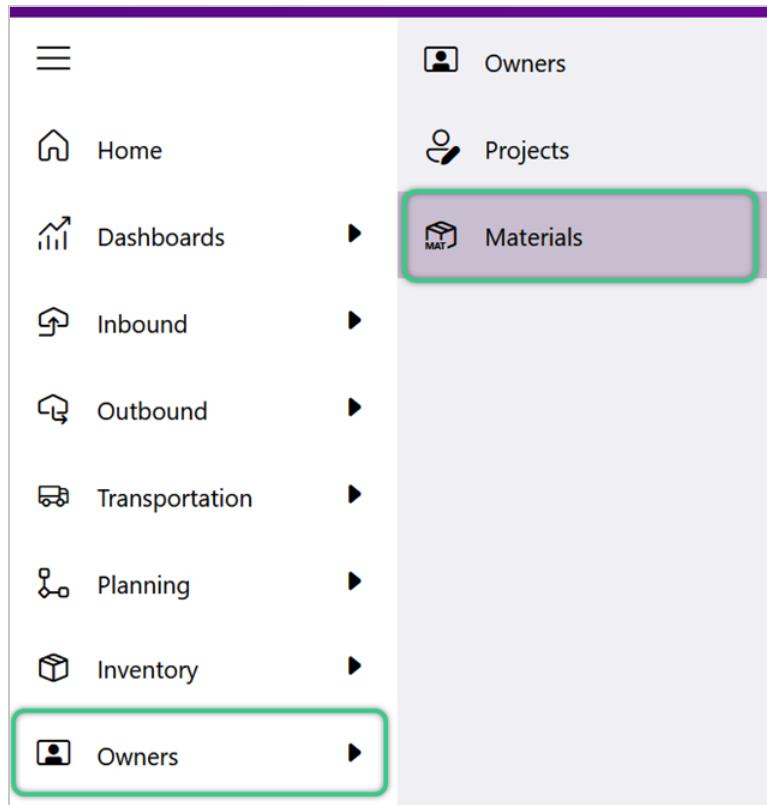
## Prerequisites

---

- [Owner](#)
- [Project](#)
- [Materials](#)

## Step 1. Open the Materials Hub

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



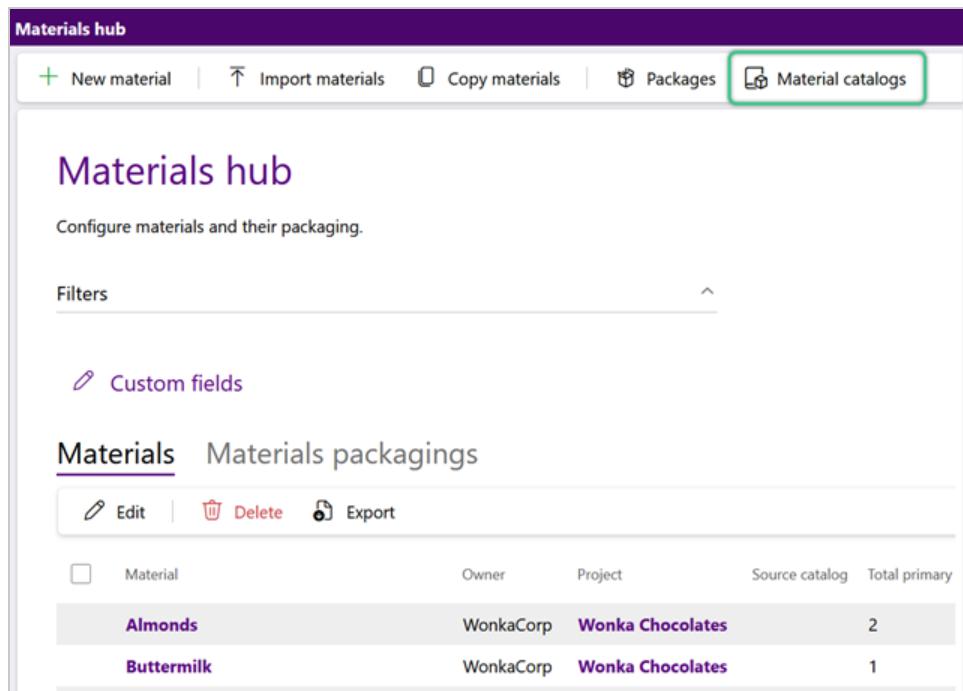
The **Materials Hub** will display.

The screenshot shows the 'Materials hub' interface. At the top, there are buttons for 'New material', 'Import materials', 'Copy materials', 'Packages', and 'Material catalogs'. Below this is a summary card with the text 'Total materials' and the number '16'. To the left, there are filters for 'Owner' (set to 'WonkaCorp') and 'Project'. A section for 'Custom fields' is shown. The main area displays a table of materials:

Material	Owner	Project	Source catalog	Total primary pick count	Total primary pick sum	Total non primary pick sum	Lot controlled	Serial controlled	Fixed weight
Almonds	WonkaCorp	Wonka Chocolates	2	10	63		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Buttermilk	WonkaCorp	Wonka Chocolates	1	5	38256.5		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Caramel	WonkaCorp	Wonka Chocolates	0	0	6091		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Chocolate Caramel Turtle	WonkaCorp	Wonka Chocolates	2	2272.0000001	14134.80246122		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

## Step 2. Create a Material Catalog

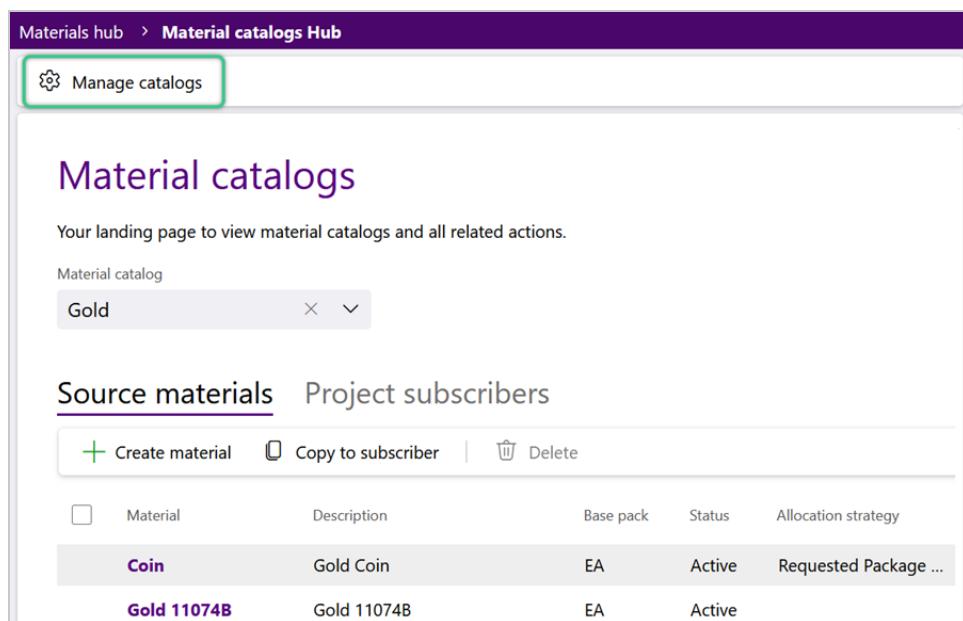
1. Click the **Material Catalogs** button in the top toolbar.



The screenshot shows the 'Materials hub' interface. At the top, there is a toolbar with several buttons: 'New material' (green plus icon), 'Import materials' (down arrow icon), 'Copy materials' (copy icon), 'Packages' (package icon), and 'Material catalogs' (catalog icon). The 'Material catalogs' button is highlighted with a green box. Below the toolbar, the title 'Materials hub' is displayed in purple, followed by the subtitle 'Configure materials and their packaging.' A 'Filters' section is present. Under the heading 'Materials', there is a table with columns: Material, Owner, Project, Source catalog, and Total primary. Two items are listed: 'Almonds' and 'Buttermilk', both associated with 'WonkaCorp' and 'Wonka Chocolates', with totals of 2 and 1 respectively. Below the table are buttons for 'Edit', 'Delete', and 'Export'.

Material	Owner	Project	Source catalog	Total primary
Almonds	WonkaCorp	Wonka Chocolates		2
Buttermilk	WonkaCorp	Wonka Chocolates		1

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



The screenshot shows the 'Material catalogs Hub' interface. At the top, there is a breadcrumb navigation 'Materials hub > Material catalogs Hub' and a 'Manage catalogs' button, which is highlighted with a green box. Below the header, the title 'Material catalogs' is shown in purple, with the subtitle 'Your landing page to view material catalogs and all related actions.' A 'Material catalog' search bar contains the text 'Gold'. Under the heading 'Source materials', there is a table with columns: Material, Description, Base pack, Status, and Allocation strategy. Two items are listed: 'Coin' and 'Gold 11074B', both described as 'Gold Coin' with 'EA' base packs, 'Active' status, and 'Requested Package ...' allocation strategy. Below the table are buttons for 'Create material', 'Copy to subscriber', and 'Delete'.

Material	Description	Base pack	Status	Allocation strategy
Coin	Gold Coin	EA	Active	Requested Package ...
Gold 11074B	Gold 11074B	EA	Active	

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

Material catalogs			
<input type="checkbox"/>	Name *	Description *	Created on
Modified on			
	Gold	Gold - Precious Metal	10/7/2024, 9:22 PM
	Kirkland	Kirkland Brand Line	12/11/2024, 12:42 PM
	Plat	Plat	11/8/2024, 10:25 AM
	Silver	silver cat	11/3/2024, 7:46 AM
	Spencer	All Spencer Materials	12/13/2024, 11:50 AM
<b>+ Add row</b>			

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

Material catalogs			
<input type="checkbox"/>	Name *	Description *	Created on
Modified on			
	Gold	Gold - Precious Metal	10/7/2024, 9:22 PM
	Kirkland	Kirkland Brand Line	12/11/2024, 12:42 PM
	Plat	Plat	11/8/2024, 10:25 AM
	Silver	silver cat	11/3/2024, 7:46 AM
	Spencer	All Spencer Materials	12/13/2024, 11:50 AM
Candy		Candy of all brands	...
<b>+ Add row</b>			✓

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

Material catalogs			
<input type="checkbox"/>	Name *	Description *	Created on
	Gold	Gold - Precious Metal	10/7/2024, 9:22 PM
	Kirkland	Kirkland Brand Line	12/11/2024, 12:42 PM
	Plat	Plat	11/8/2024, 10:25 AM
	Silver	silver cat	11/3/2024, 7:46 AM
	Spencer	All Spencer Materials	12/13/2024, 11:50 AM
	Candy	Candy of all brands	... <input checked="" type="checkbox"/>

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

Material catalogs			
<input type="checkbox"/>	Name *	Description *	Created on
	Gold	Gold - Precious Metal	10/7/2024, 9:22 PM
	Kirkland	Kirkland Brand Line	12/11/2024, 12:42 PM
	Plat	Plat	11/8/2024, 10:25 AM
	Silver	silver cat	11/3/2024, 7:46 AM
	Spencer	All Spencer Materials	12/13/2024, 11:50 AM
	Candy	Candy of all brands	... <input checked="" type="checkbox"/>

### Step 3. Create Materials for the Catalog

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

The screenshot shows the 'Material catalogs Hub' interface. At the top, there's a purple header bar with the title 'Material catalogs Hub'. Below it is a navigation bar with a gear icon labeled 'Manage catalogs'. The main content area has a heading 'Material catalogs' and a sub-instruction: 'Your landing page to view material catalogs and all related actions.' A 'Material catalog' dropdown menu is open, showing 'Candy' as the selected item, which is highlighted with a green border. Below the catalog selection, there are two tabs: 'Source materials' (underlined) and 'Project subscribers'.

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

This screenshot continues from the previous one, showing the 'Material catalogs Hub' with the 'Source materials' tab selected. The 'Material catalog' dropdown still shows 'Candy'. At the bottom of the screen, the toolbar for the 'Source materials' tab includes several buttons: '+ Create material' (highlighted with a green box), 'Copy to subscriber', and 'Delete'. Below the toolbar, there's a table with columns for 'Material' (with a checkbox), 'Description', and 'Base packaging'.

## 3. Enter the basic information for the Catalog Material.

For more details on creating Materials, please visit our [Materials Guide](#).

Create material catalog source material

[Create](#) [Cancel](#)

**Material**

Lookup *	Name
Maple Glazed SP SDC	Maple Glazed Salted Pecans in Stron ...
Description *	Packaging *
Chocolove Maple Glazed Salted Peca ...	Box Sm
Group *	Allocation strategy *
A material group	Requested Package Only
UPC code	
1627000173	

**Details**

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

For more details on creating Materials, please visit our [Materials Guide](#).

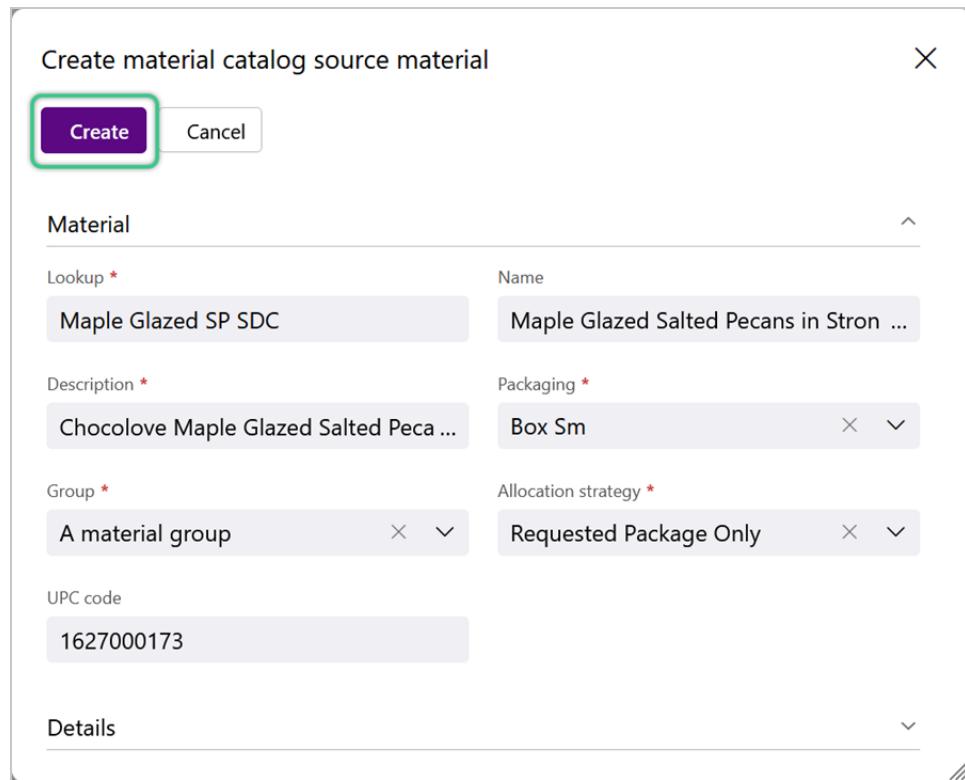
Create material catalog source material X

Create Cancel

**Details** ^

Lot controlled *	Serial controlled *
<input type="checkbox"/>	<input type="checkbox"/>
Fixed weight *	Fixed volume *
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Fixed dimension *	Decimal precision
<input checked="" type="checkbox"/>	<span style="border: 1px solid #ccc; padding: 2px 10px; border-radius: 5px;">▼</span>
Weight *	Shipping weight *
<input type="text" value="1.00"/>	<input type="text" value="1.00"/>
Weight UOM *	Volume *
<input type="text" value="lb"/> <span style="border: 1px solid #ccc; padding: 2px 10px; border-radius: 5px;">X ▼</span>	<input type="text" value="1.00"/>
Shipping volume *	Volume UOM *
<input type="text" value="1.00"/>	<input type="text" value="cu. in."/> <span style="border: 1px solid #ccc; padding: 2px 10px; border-radius: 5px;">X ▼</span>
Length *	Width *
<input type="text" value="1.00"/>	<input type="text" value="1.00"/>
Height *	Dimension UOM *
<input type="text" value="1.00"/>	<input type="text" value="in"/> <span style="border: 1px solid #ccc; padding: 2px 10px; border-radius: 5px;">X ▼</span>
Pallet high	Pallet tie
<input type="text"/>	<input type="text"/>

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



The screenshot shows a modal dialog titled "Create material catalog source material". At the top right is a close button (X). Below the title are two buttons: "Create" (highlighted with a green border) and "Cancel".  
  
The main area is titled "Material" and contains several input fields:

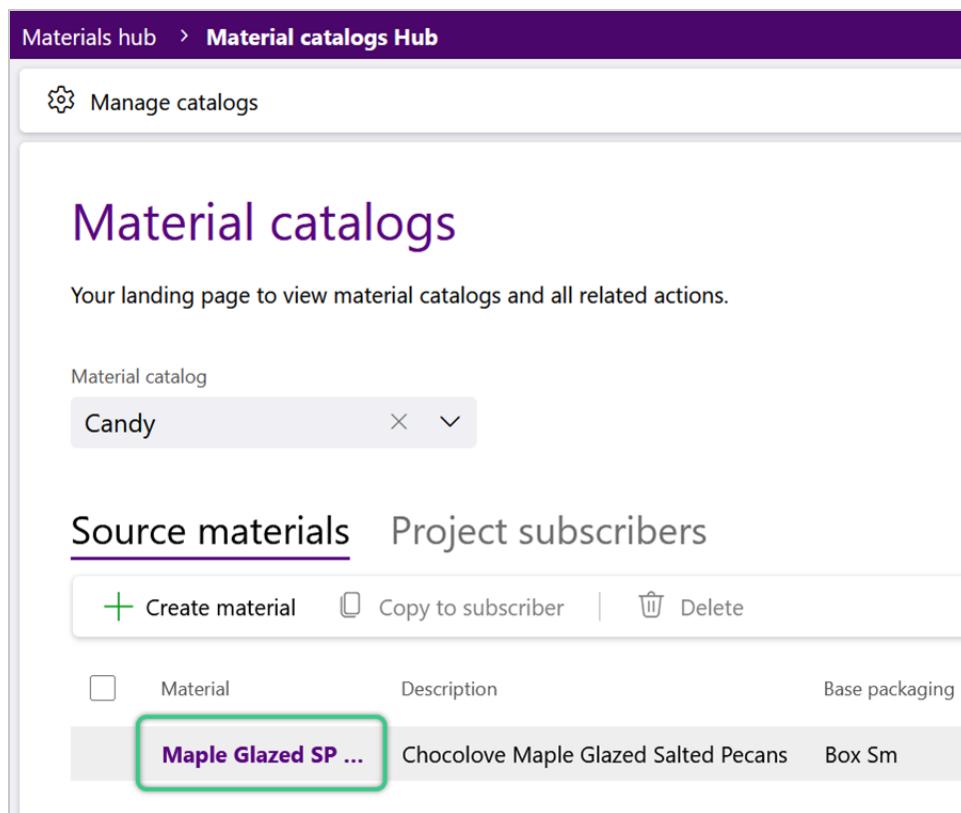
- Lookup \***: A dropdown menu showing "Maple Glazed SP SDC".
- Name**: A text field containing "Maple Glazed Salted Pecans in Stron ...".
- Description \***: A dropdown menu showing "Chocolove Maple Glazed Salted Peca ...".
- Packaging \***: A dropdown menu showing "Box Sm".
- Group \***: A dropdown menu showing "A material group".
- Allocation strategy \***: A dropdown menu showing "Requested Package Only".
- UPC code**: A text field containing "1627000173".

  
At the bottom left of the dialog is a "Details" section with a dropdown menu.

#### Step 4. Complete the Material Setup

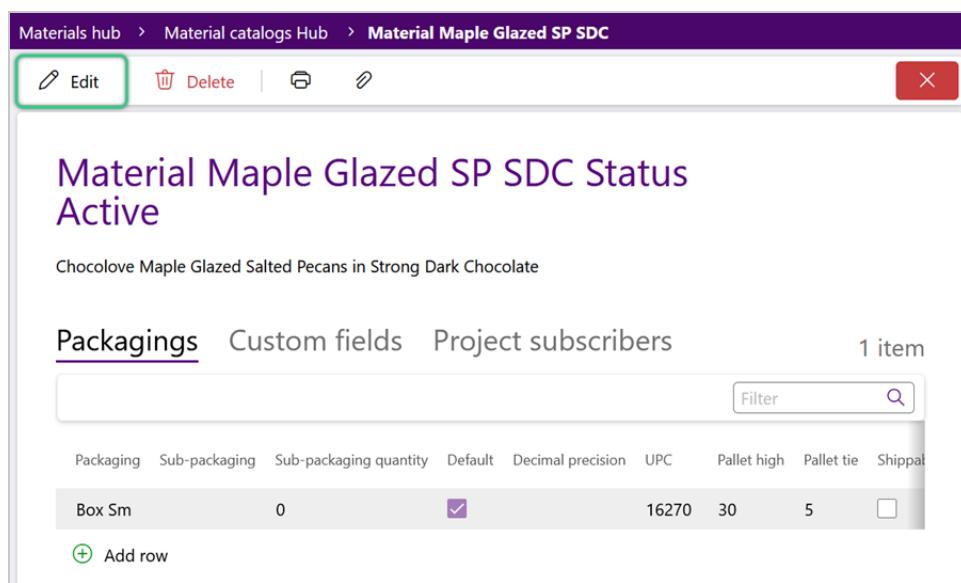
Once a Material has been created, there are many more options that can be setup for its Configuration and Manufacturing. For more details about editing a Material, please visit our [Materials Guide](#).

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



The screenshot shows the 'Material catalogs Hub' interface. At the top, there's a navigation bar with 'Materials hub > Material catalogs Hub'. Below it is a toolbar with a gear icon labeled 'Manage catalogs'. The main area is titled 'Material catalogs' with the sub-instruction: 'Your landing page to view material catalogs and all related actions.' A search bar at the top has 'Candy' typed into it. Below the search bar, there are two tabs: 'Source materials' (which is underlined) and 'Project subscribers'. Underneath these tabs is a toolbar with three buttons: '+ Create material', 'Copy to subscriber', and 'Delete'. The main content area is a table with columns: 'Material' (checkbox), 'Description', and 'Base packaging'. A row for 'Maple Glazed SP ...' is highlighted with a green border. The description column for this row is 'Chocolove Maple Glazed Salted Pecans' and the base packaging is 'Box Sm'.

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



The screenshot shows the 'Material Maple Glazed SP SDC' details page. The top navigation bar includes 'Materials hub > Material catalogs Hub > Material Maple Glazed SP SDC'. The top toolbar features several icons: 'Edit' (highlighted with a green border), 'Delete', 'Copy', and 'X'. The main title is 'Material Maple Glazed SP SDC Status Active'. Below the title is a description: 'Chocolove Maple Glazed Salted Pecans in Strong Dark Chocolate'. There are three tabs at the top: 'Packagings' (underlined), 'Custom fields', and 'Project subscribers'. The 'Packagings' tab shows a table with one item. The table has columns: 'Packaging', 'Sub-packaging', 'Sub-packaging quantity', 'Default', 'Decimal precision', 'UPC', 'Pallet high', 'Pallet tie', and 'Shippal'. The first row contains 'Box Sm', '0', a checked checkbox, '16270', '30', '5', and an unchecked checkbox. There are also 'Filter' and 'Add row' buttons.

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

Edit material X

Save Cancel

**Configuration** ^

Lot controlled

Serial controlled

Fixed dimension

Fixed weight

Allocation strategy \* Requested Package Only X ▾

Storage category rule Cooler Goods X ▾

Shelf life (in days) 90

Minimum dating span

Skip inventory count

3. Enter the **Manufacturing** settings.

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

Edit material X

Save Cancel

Skip count back

Scan all packagings

Allow receiving

**Manufacturing** ^

Material type ▼

Allowed time outside storage

Production rate

Required crew size

Use oldest expiry date

Skip auto-creation of move tasks for the material

Enable packaging review

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

The screenshot shows the 'Material Maple Glazed SP SDC' details page. At the top, there are buttons for Edit, Delete, and a green 'Attachments' icon. Below the title 'Material Maple Glazed SP SDC Status Active' is the description 'Chocolove Maple Glazed Salted Pecans in Strong Dark Chocolate'. The 'Packagings' tab is selected, showing one item. A 'Filter' search bar is present. The table below has columns: Packaging, Sub-packaging, Sub-packaging quantity, Default, Decimal precision, UPC, Pallet high, Pallet tie, and Shipping. One row is shown: Box Sm, 0, checked, 16270, 30, 5, unchecked. A green 'Add row' button is at the bottom.

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

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

This screenshot is identical to the previous one, showing the 'Material Maple Glazed SP SDC' details page. The 'Packagings' tab is selected, and the 'Add row' button at the bottom of the table is highlighted with a green border.

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

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

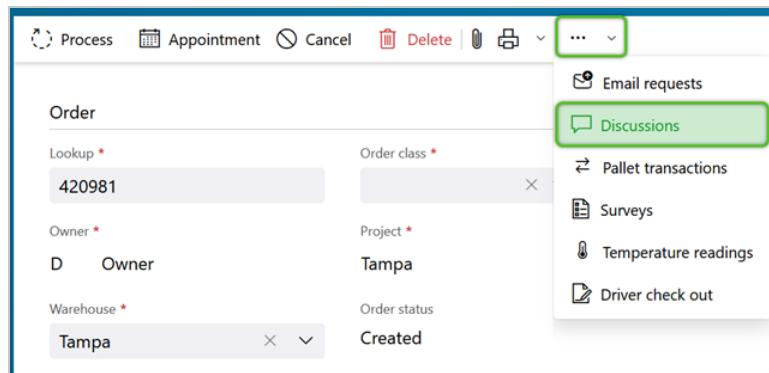
# Add Comments

Comments can be retained for many entities in Footprint, tying them to the Order, Invoice, etc.

## Prerequisites

- Any entity capable of storing a Comment

1. From the order, click the **Options** dropdown, then select **Discussions**.



Any existing Comments will be listed for review.

### Discussions

3 items

Refresh Filter

New discussion

Add a comment. @ to mention a person.

**d** @datexcorp.com commented  6/28/2024, 1:16:33 PM  
I agree this order is a great order.  
  
**Read** **Delete**

**t** @datexcorp.com commented  6/28/2024, 1:15:49 PM  
This order is important.

2. In the **Discussion** window, enter the new Comment, then click the blue **Save** button.

The screenshot shows the 'Discussions' window with a green border around the input field. The window title is 'Discussions' and it shows '3 items'. There is a 'Refresh' button and a 'Filter' search bar. A 'New discussion' button is visible at the top of the list. The first comment is from user 'd' (@datexcorp.com) on 6/28/2024, 1:16:33 PM, stating 'I agree this order is a great order.' It has 'Read' and 'Delete' buttons. The second comment is from user 't' (@datexcorp.com) on 6/28/2024, 1:15:49 PM, stating 'This order is important.'

Discussions X

3 items

Refresh Filter New discussion

Add a comment. @ to mention a person.

Save Cancel

d @datexcorp.com commented 6/28/2024, 1:16:33 PM

I agree this order is a great order.

Read Delete

t@datexcorp.com commented 6/28/2024, 1:15:49 PM

This order is important.

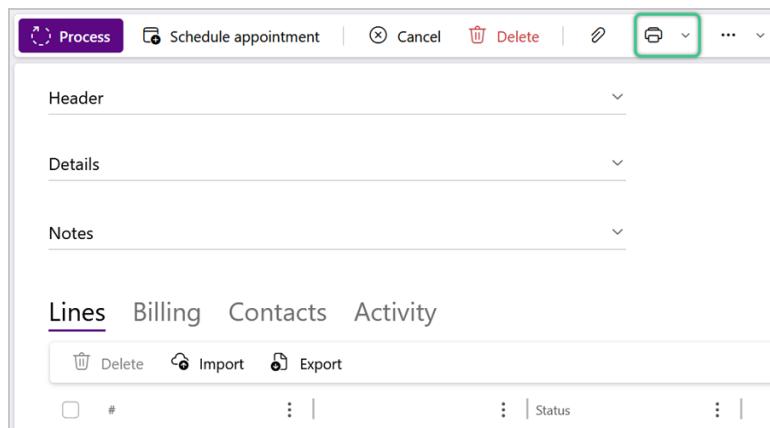
# Print Files

Anywhere you see a Print icon, you can select a file to be printed. Options listed in the Print dropdown vary depending upon the entity and your organization's needs. Some examples include License Plate labels, Receiving Report, Unloading Tally, Purchase Order Report, and Load Slip.

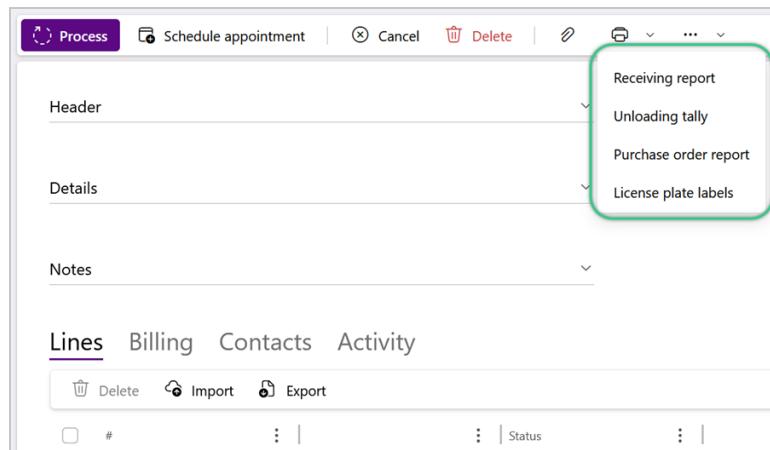
## Prerequisites

- Any entity capable of offering Print options

1. Click the **Print** printer icon.



2. In the **Print** dropdown, select an item to be printed.



3. In the standard **Print** window that opens, set the printing details for the document, then click **Print**.

The selected file will be printed as specified.