Guide utilisateur

FP Trax

Sommaire

1 Bienvenue

Chère cliente, Cher client,

Nous vous remercions d'avoir choisi **FP Trax** et apprécions pleinement la confiance que vous accordez à notre produit.
Avec FP Trax, vous bénéficiez d'une solution conçue pour optimiser vos flux de travail en améliorant votre efficacité, en vous offrant une plus grande transparence et en garantissant un suivi fiable de vos colis ainsi que de vos actifs, tels que vos équipements techniques. Vous réduisez ainsi les pertes, gagnez un temps précieux et optimisez, à terme, vos coûts opérationnels.

Ce document vous propose une vue d'ensemble complète de FP Trax, détaillant ses fonctionnalités clés, ses domaines d'application ainsi que ses modalités d'utilisation.

Nous vous souhaitons de rencontrer un franc succès dans l'utilisation de FP Trax. Notre équipe reste à votre entière disposition pour toute question par e-mail à l'adresse : support@traxsuite.com.

Cordialement,
L'équipe FP Trax

2 Support

Votre équipe FP Trax

E-Mail : support@traxsuite.com

Web : https://helpcenter-trax.fp-dbs.com/fr/support/home

3 Informations générales sur FP Trax

FP Trax est une solution de suivi basée sur le cloud qui ne nécessite aucune installation locale. Elle vous permet de gérer efficacement vos colis, courriers, documents de livraison ainsi que vos actifs. Grâce à son architecture modulaire, le système s'adapte précisément à vos besoins. Vous trouverez une présentation détaillée de l'ensemble de nos modules dans la section 3.1 *Fonctionnalités et modules de FP Trax*.

FP Trax est accessible depuis un simple navigateur web ou via notre application mobile (disponible sur Android et iOS), qui intègre un mode hors-ligne.

Ce guide décrit l'intégralité des fonctionnalités de la solution. Notez toutefois que les options disponibles sur votre interface peuvent varier en fonction de votre configuration.

3.1 Fonctionnalités et modules de FP Trax

Voici une vue d'ensemble des fonctionnalités incluses dans les modules « Suivi de colis », « Suivi de colis Pro », « Suivi des actifs », « Courriers » et « Gestion des stocks ».

Fonctionnalités	Modules				
	Actifs	Colis	Colis Pro	Courriers	Stocks
Administration • Création manuelle, import et export de contacts (expéditeurs, destinataires, utilisateurs) et de hiérarchies d'emplacements • Création et attribution de rôles et de niveaux d'accès • Création d'étiquettes personnalisées (Colis, articles et emplacements) • Archivage des données	X	X	X	X	X
Gestion des expéditions (flux professionnels et privés) • Réception, traitement, livraison • Preuve de dépôt/livraison par : photo ou signature électronique • Archivage des bordereaux de livraison conforme aux exigences d'audit • Notification et suivi des avaries (gestion des litiges) • Moteur de recherche, détails et historique des expéditions, rapports et tableaux de bord • Gestion personnalisée des types d'expéditions, des transporteurs, des champs additionnels, des profils mobiles Pro, des statuts, des notifications et des rappels	-	X	X	-	-

Gestion des actifs • Création manuelle, import et export d'actifs • Attribution et modification des actifs • Moteur de recherche, détails et historique des articles, tableaux de bord • Catégorisation / Typologie, statuts, notifications et rappels	X	-	-	-	-
Courrier • Notifications	-	-	-	X	-
Compte destinataire (invité) • Vue d'ensemble et fiches détaillées de vos propres expéditions • Gestion de votre profil et de vos coordonnées de livraison	-	X	X	-	-
Groupement de colis • Regroupement de plusieurs colis en une seule et unique livraison • Traitement simultané de plusieurs colis • Envoi d'une notification par e-mail unique pour l'ensemble des colis • Mise à disposition de plusieurs colis au sein d'un même locker (consigne)	-	-	X	-	-
Profils mobiles • Création et attribution de filtres de colis dynamiques pour les utilisateurs de l'application • Traitement de l'intégralité des colis via les profils mobiles	-	-	X	-	-
Rapports automatisés • Configuration et envoi de rapports automatisés	-	-	X	-	-
Solution de consignes connectées (lockers) • Dépôt et retrait de colis dans les consignes automatiques • Gestion des notifications et des rappels • Contrôle de la disponibilité des casiers en fonction de leur taille • Tableau de bord	-	X	X	-	-

Import automatisé • Importation automatique des données de colis attendus (saisie simplifiée des colis) • Synchronisation automatisée des contacts avec Entra ID incluant l'authentification unique (SSO), aucune gestion manuelle des utilisateurs requise	-	-	X	-	-
Vue d'ensemble des stocks • Gestion d'entrepôt claire et visuelle selon le principe Kanban • Création manuelle, import et export des volumes en stock • Attribution et modification intuitives des stocks • Moteur de recherche, détails et historique de l'inventaire • Alerte visuelle par code couleur en cas d'atteinte du seuil de stock minimum	-	-	-	-	X

Tableau 1 : Vue d'ensemble de la traçabilité

3.2 Configuration système requise et composants matériels

3.2.1 Application web

Pour utiliser **la plateforme web FP Trax,** une connexion Internet stable est requise.
Nous recommandons d'utiliser la **dernière version** d'un navigateur web moderne.

Pour un fonctionnement optimal, votre ordinateur doit disposer d'au moins **deux ports USB** afin de connecter une imprimante et un lecteur de code-barres (sans fil).

3.2.2 Application mobile FP Trax

L'application mobile FP Trax est disponible pour les appareils **Android** et **iOS** et peut être téléchargée sur leurs stores d'applications respectifs. L'application peut être utilisée en mode **connecté ou hors ligne,** mais une connexion Internet est requise périodiquement pour **synchroniser les données.**

Configuration système minimale :

- **Android :** version 7.1.2 (Nougat) ou supérieure
- **iOS** : version 11.0 ou supérieure

Nous recommandons de toujours utiliser **la dernière version disponible du système d'exploitation** ainsi que la **dernière version de l'application mobile FP Trax.**

3.2.3 Imprimantes

Pour une impression d'étiquettes fiable, nous recommandons **l'imprimante d'étiquettes Zebra ZD421,** qui peut être connectée en **Wi-Fi** ou en **Ethernet.**

Alternativement, d'autres imprimantes standards peuvent également être utilisées.
Pour les instructions de configuration, reportez-vous à la section *4.2 Configuration de l'imprimante*.

3.2.4 Etiquettes

Si vous utilisez l'imprimante recommandée, nous vous suggérons d'employer des **étiquettes thermiques autocollantes (101,6 × 76,2 mm).**

L'utilisation **d'étiquettes de couleur** (jaunes par exemple) peut vous aider à distinguer facilement les étiquettes FP Trax des autres marquages présents sur les colis.

3.2.5 Système de consignes

Des **systèmes de consignes** optionnels sont disponibles pour permettre un traitement des colis **24h/24 et 7j/7.**

Pour plus d'informations, veuillez contacter **l'équipe FP Trax.**

4 Configuration de l'environnement FP Trax

Suite à votre onboarding, **l'équipe FP Trax** a déjà renseigné les données de votre entreprise dans le système et créé votre **accès administrateur**.
Grâce à cet accès, vous pouvez configurer l'environnement FP Trax selon vos besoins et exploiter pleinement le potentiel du système. Si vous le souhaitez, vous pouvez également effectuer cette configuration en collaboration avec l'équipe FP Trax lors de votre session d'intégration.

Pour commencer, veuillez suivre les étapes ci-dessous dans l'ordre indiqué :

4.1 Paramétrage de la gestion des Colis / Actifs / Courriers

1) Inscription initiale voir section *5.1 Connexion*
2) Paramétrage des rôles voir section *12.2 Rôles*
3) (En option) Installation du matériel d'impression voir section *4.2 Configuration de l'imprimante*
4) (En option) Paramétrage des formats d'étiquettes voir section *12.4 Étiquettes*
5) Paramétrage de la hiérarchie des lieux *voir section 12.3 Emplacements*
6) Paramétrage des règles de rétention des données voir section *12.6 Archivage*
7) Configuration des options de suivi des colis voir section *7.6 Paramétrage*
8) (En option) Configuration de l'import planifié voir section *12.5 Integrations*
9) Ajout des fiches contacts dans le système voir section *12.1 Contacts*
10) Attribution des différents rôles aux utilisateurs voir section *12.1 Ajouter des contacts manuellement — Utilisateurs*

4.2 Configuration de l'imprimante

L'utilisation d'une imprimante **n'est pas obligatoire** pour l'ensemble des modules ou des configurations. Si vous avez un doute sur la nécessité d'une imprimante pour votre installation, n'hésitez pas à nous contacter

Pour l'impression de vos étiquettes, nous recommandons d'utiliser **l'imprimante d'étiquettes Zebra ZD421** en combinaison avec l'application FP Trax.

Pour obtenir plus d'informations sur les étiquettes compatibles, reportez-vous à la *section 3.2.4 Étiquettes*.

4.2.1 Impression via USB

Remarque : l'installation des pilotes de l'imprimante sur l'ordinateur nécessite des droits d'administrateur.

1) Téléchargez et installez le pilote de l'imprimante Zebra ZD421 depuis le site web de Zebra.
2) Sélectionnez le port USB comme mode de connexion.

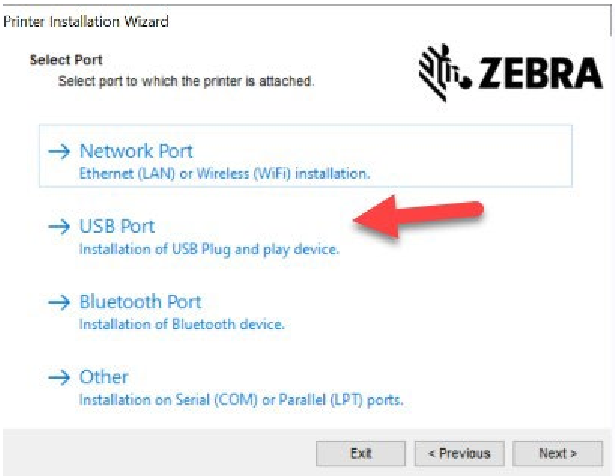


Fig. 1 Port USB

3) Poursuivez et cliquez sur « Suivant » jusqu'à la fin de l'installation.

4) Configurez les **paramètres de l'imprimante** :

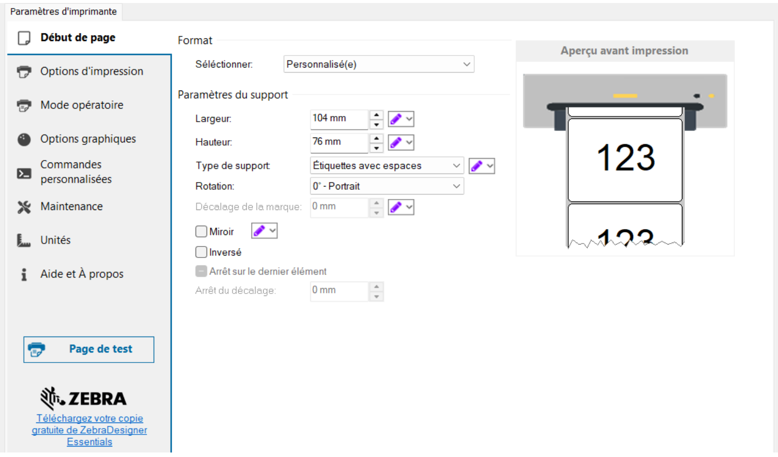


Fig. 2 Zebra ZD421 Page de paramétrage

Définir la largeur : 101 mm **Définir la hauteur :** 76 mm **Sélectionner le type de support** : Étiquettes avec espaces (à modifier si vous utilisez des étiquettes en continu)

Change **Graphic Options**:

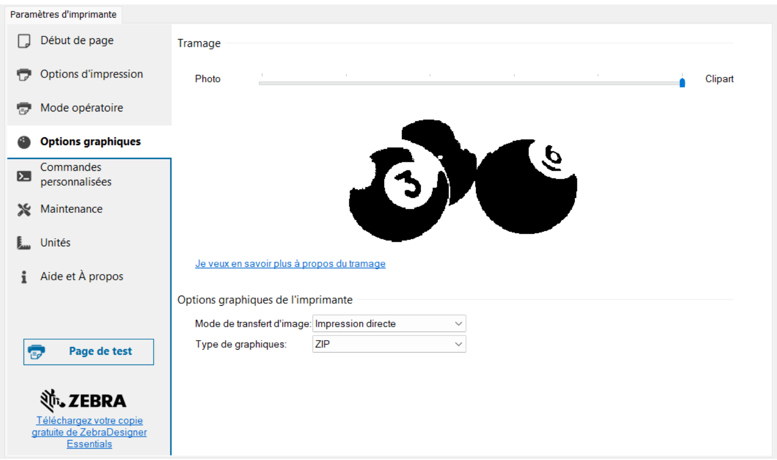


Fig. 3 Zebra ZD421 Options graphiques

Déplacez le curseur sur « **Clipart** »

4.2.2 Impression via WIFI

Vous trouverez ci-joint un guide pour configurer l'imprimante ci-dessus en utilisant la fonctionnalité **d'impression WiFi** depuis l'application mobile.

1) Téléchargez et installez le programme « Zebra Setup Utilities » sur votre ordinateur. Le fichier .exe est disponible via le lien suivant sur la page du fabricant Zebra :

[Connecteur Zebra Nucleus | Zebra]

2) Connectez l'imprimante à votre ordinateur à l'aide d'un câble USB (inclus) et lancez le programme de configuration.

3)

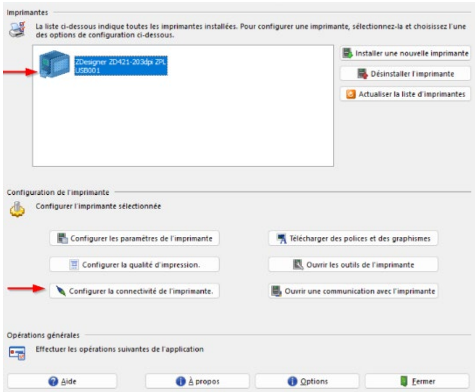


Fig. 4 Configuration imprimante 1

Sélectionnez l'imprimante, puis cliquez sur « Configurer la connectivité de l'imprimante ».

4)

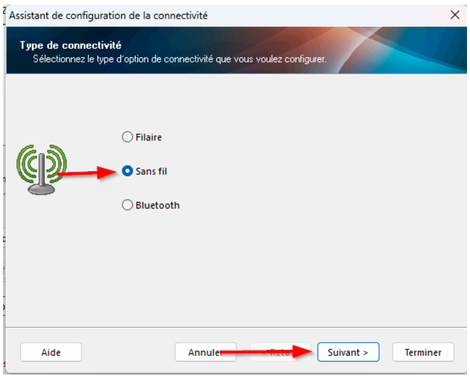


Fig. 5 Configuration imprimante 2

Sélectionnez « Sans fil », puis cliquez sur « Suivant > »

5)

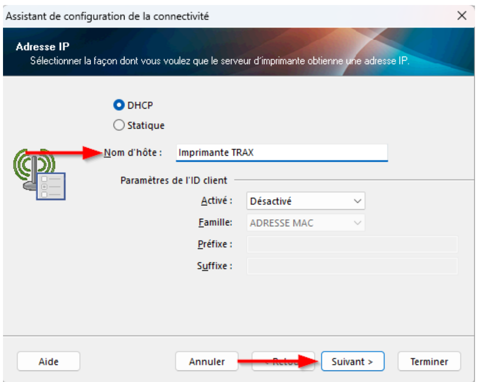


Fig. 6 Configuration imprimante 3

Définissez un nom d'hôte = nom de l'imprimante (par exemple : Imprimante FP Trax), puis cliquez sur « Suivant > ».

6)

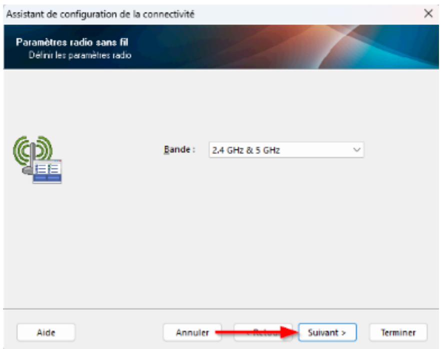


Fig. 7 Configuration imprimante 4

Conservez le paramètre par défaut, puis cliquez sur « Suivant > »

7)

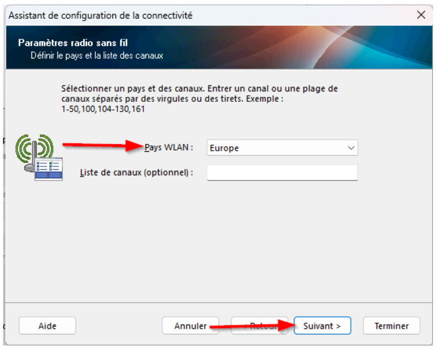
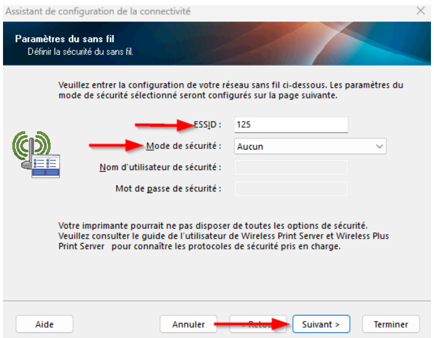


Fig. 8 Configuration imprimante 5

Sélectionnez « Europe », puis cliquez sur « Suivant > »

8)



Saisissez l'ESSID de votre Wi-Fi (nom de votre réseau Wi-Fi), sélectionnez le mode de sécurité, puis cliquez sur « Suivant > »

Fig. 9 Configuration imprimante 6

9)

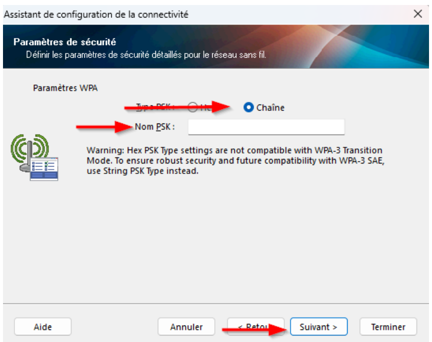
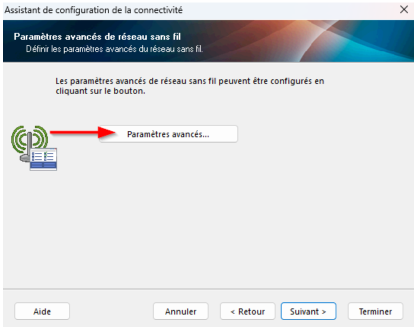


Fig. 10 Configuration imprimante 7

Sélectionnez « Chaîne », saisissez le mot de passe du Wi-Fi, puis cliquez sur « Suivant > »

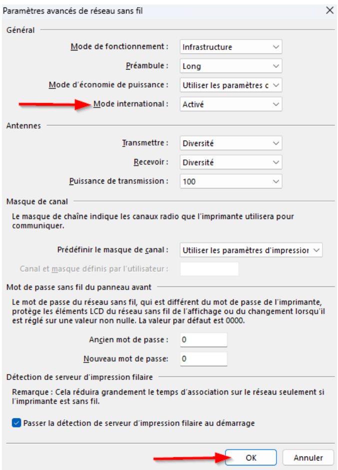
10)



Cliquez sur « Paramètres avancés ».

Fig. 11 Configuration imprimante 8

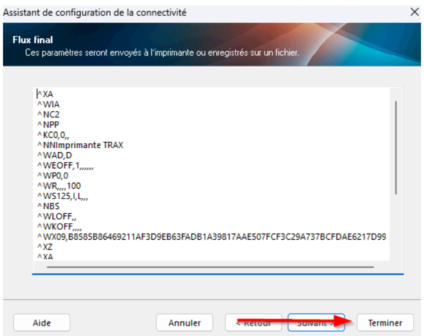
11)



Sélectionnez « Activé » dans le menu déroulant « Mode international », puis cliquez sur « OK ». Cliquez ensuite sur « Suivant > »

Fig. 12 Configuration imprimante 9

12)



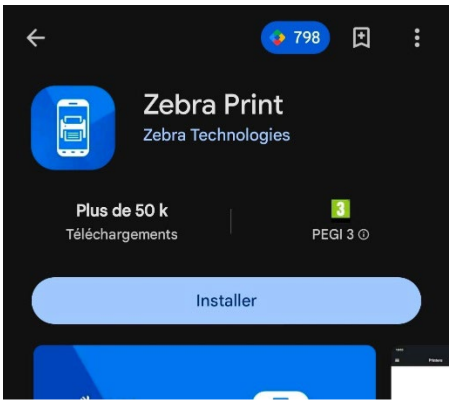
dès

Cliquez sur « Terminer » pour envoyer les paramètres à l'imprimante. Celle-ci va redémarrer, et le voyant réseau de l'imprimante devrait alors s'allumer en vert. Il s'éteindra lorsque l'imprimante passera en mode veille, mais il redeviendra vert que vous appuirez une fois sur le bouton d'alimentation.

Fig. 13 Configuration imprimante 10

13)

:



Installez l'application « Zebra Print » sur votre appareil mobile.

Vous pouvez trouver l'application soit sur le site web de Zebra

[Zebra Print : Assistance et téléchargements | Zebra]

ou téléchargez-la directement depuis le Google Play Store ou l'App Store.

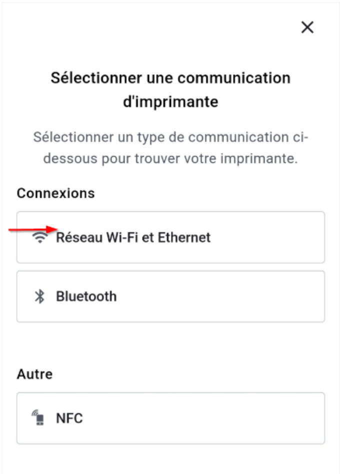
Fig. 14 Configuration imprimante 11

14)

Dans la section « Imprimantes », cliquez sur les trois petits points et sélectionnez « Ajouter une imprimante »

Fig. 15 Configuration imprimante 12

15)



Sélectionnez « Réseau Wi-Fi et Ethernet »

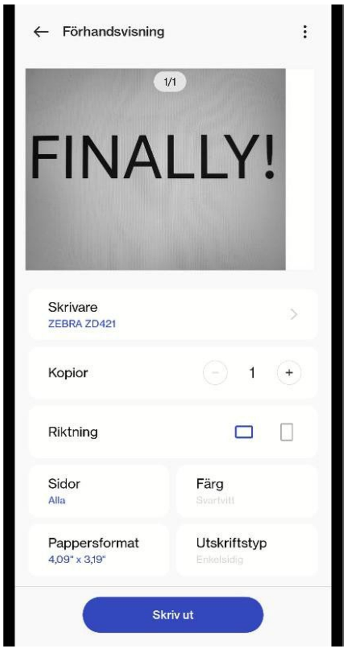
Fig. 16 Configuration imprimante 13

16)

Sélectionnez votre imprimante et cliquez sur Sauvegarder dans les réglages

Fig. 17 Configuration imprimante 14

17)



Dès que vous souhaitez lancer une impression depuis l'appareil mobile, celle-ci peut désormais être sélectionnée.

Fig. 18 Configuration imprimante 15

18)
Sur

de

Connectez-vous à l'application mobile FP Trax. l'écran d'accueil, cliquez sur le menu (les trois barres horizontales) en haut à gauche. Cliquez ensuite sur *Paramètres*, puis sur *Configuration l'application* et activez le curseur *Imprimer l'étiquette du colis*.

Remarque : Si la fonction « Configuration de l'appli » est grisée, veuillez vérifier vos droits (voir section *12.2.2 Rôles et permissions*).
Remarque 2 : Effectuez cette configuration sur chaque appareil pour chaque utilisateur qui l'utilise.

Fig. 19 Configuration imprimante 16

5 Comment utiliser FP Trax

5.1 Connexion

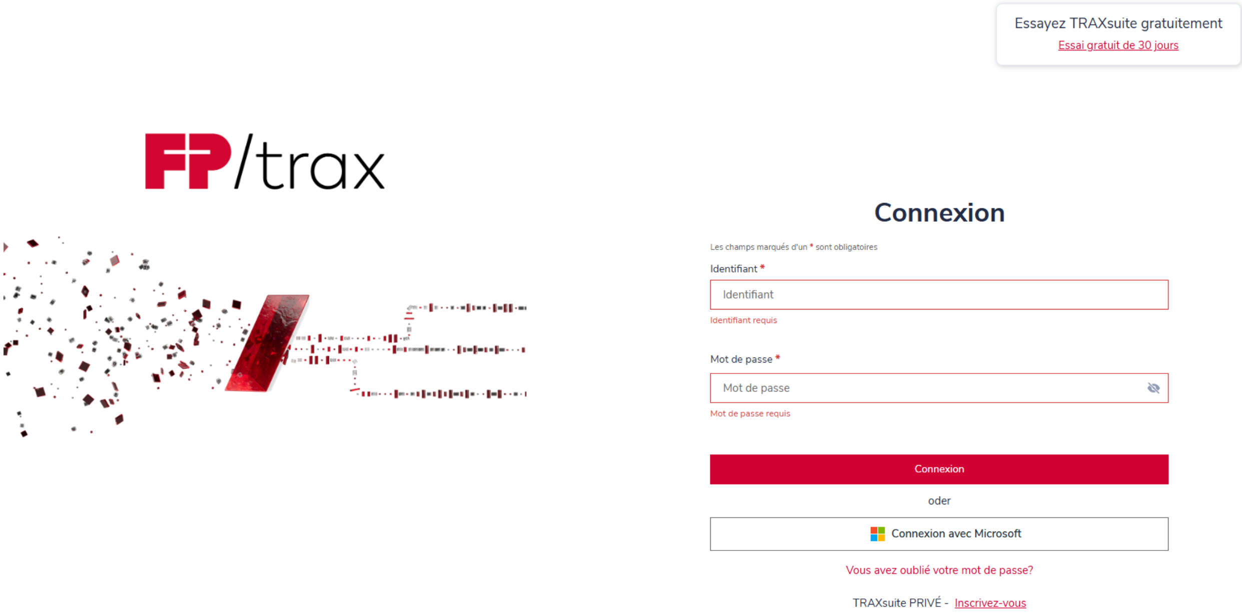


Fig. 20 Ecran de connexion

Une fois votre commande reçue et le système configuré, vous recevrez vos **identifiants de connexion administrateur personnels** pour votre compte client. Cela vous permet d'accéder à **FP Trax** via le lien ci-dessous et de commencer à utiliser le système immédiatement :

https://app.traxsuite.com/fr/auth/login

Utilisez la fonction « Mot de passe oublié » pour définir votre propre mot de passe pour la première fois.

5.2 Tableau de bord FP Trax

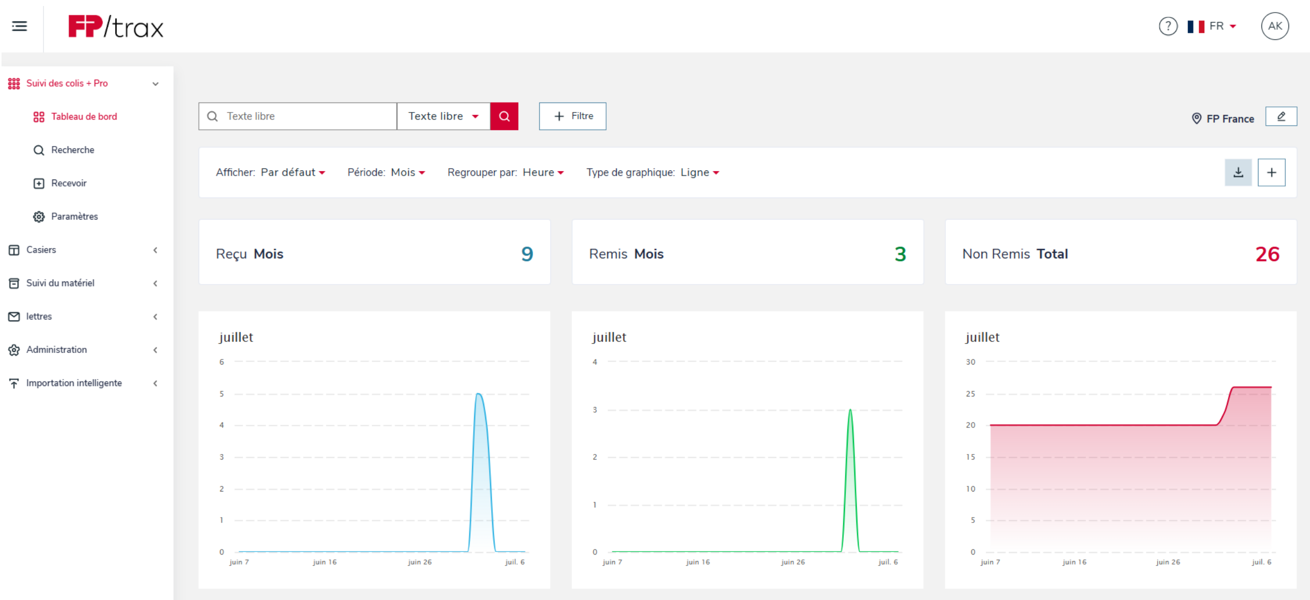


Fig. 21 Ecran d'accueil

Après vous être connecté, vous accéderez à **l'écran d'accueil.** Selon vos autorisations, différents contenus s'afficheront dans la zone principale, accompagnés d'un menu de navigation personnalisé sur la gauche.

Ce manuel décrit l'ensemble des modules de la solution **FP Trax**. Par conséquent, certains visuels présentés ici peuvent différer de ceux de votre compte réel.

5.2.1 The main navigation on the left panel

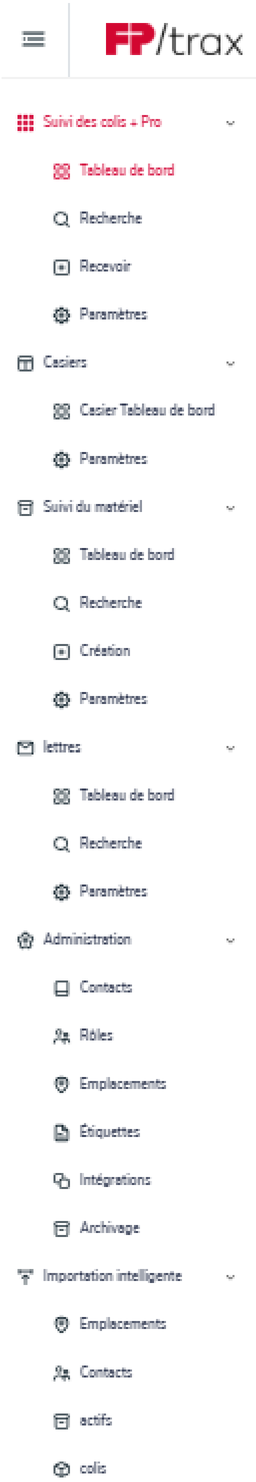


Fig. 22 Menu de navigation principal

Sur le côté gauche, vous trouverez le **menu de navigation principal**, qui comprend les modules disponibles dans votre configuration de FP Trax.

- Le premier élément du menu donne accès à Suivi de colis ou **Suivi de colis Pro**.
Les sous-menus **Tableau de bord**, **Recherche**, **Réception** et **Paramètres** sont identiques dans les deux versions.
Les fonctionnalités disponibles uniquement dans la version Pro sont signalées par la mention **Pro** dans cette documentation.
- La navigation comprend également la section **Casiers (Consignes connectées)**, avec les sous-éléments **Casiers Tableau de bord** et **Paramètres**.
- Le module **Suivi du matériel** comprend les sous-menus **Tableau de bord**, **Recherche**, **Création** et **Paramètres**.
- La section **Lettres** regroupe les fonctions de **recherche**, de **création** et de **gestion** des notifications de courrier.
- Dans **l'Inventaire**, vous pouvez créer et gérer les articles en stock et les déplacer d'un site à un autre
- La section **Administration** comprend les **Contacts**, les **Rôles**, les **Sites**, les **Étiquettes**, les **Importations planifiées** et les paramètres **d'Archivage**.

Un aperçu détaillé de toutes les fonctions des modules est disponible dans la section *3.1 Fonctionnalités et modules de FP Trax.*

5.2.2 Navigation secondaire

Cliquez sur vos initiales dans le coin supérieur droit pour ouvrir le **menu de navigation secondaire**.

5.2.2.1 Votre profil

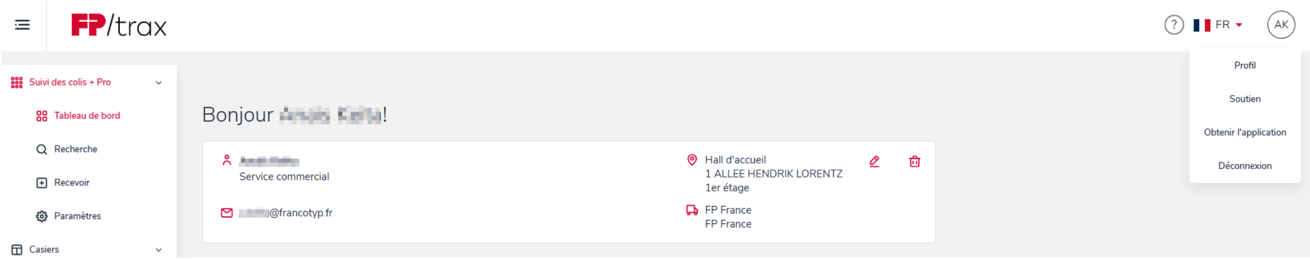


Fig. 23 Vue du profil

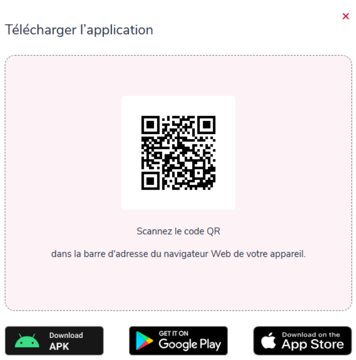
Cliquez sur vos initiales dans le coin supérieur droit et sélectionnez **Profil** pour afficher et modifier vos informations personnelles. Maintenir vos données à jour permet de garantir une attribution précise des colis et des articles.

5.2.2.2 Support (Soutien)

Dans cette section, vous trouverez les coordonnées de votre équipe FP Trax.

5.2.2.3 Télécharger l'application FP Trax

Dans la navigation secondaire, utilisez le QR code de la section « **Obtenir l'application** » pour installer l'application FP Trax, ou téléchargez-la directement depuis les magasins d'applications.



5.2.2.4 Appareils Zebra

Ouvrez le navigateur web de l'appareil, scannez le QR code directement dans la barre d'adresse à l'aide du scanner intégré, puis appuyez sur Entrée pour lancer le téléchargement.

Remarque : Le profil DataWedge s'installe automatiquement.

5.2.2.5 Téléphones mobiles

Utilisez l'appareil photo de votre appareil pour scanner le QR code, puis ouvrez le lien affiché dans votre navigateur web pour télécharger l'application.

Fig. 24 Télécharger l'application mobile

5.2.2.6 Déconnexion

Déconnectez-vous de l'application web FP Trax à l'aide du bouton de **déconnexion**.

6 Application mobile FP Trax

6.1 Connexion

Fig. 25 Login Screen App

Vos données de connexion pour l'application mobile FP Trax sont identiques à celles de l'application web.

Dans les sections *7.4.2 Créer un colis (Application mobile)* et *7.5.2 Livraison (Application mobile)*, vous trouverez toutes les informations nécessaires sur l'utilisation de l'application FP Trax.

6.2 Menu de l'application mobile

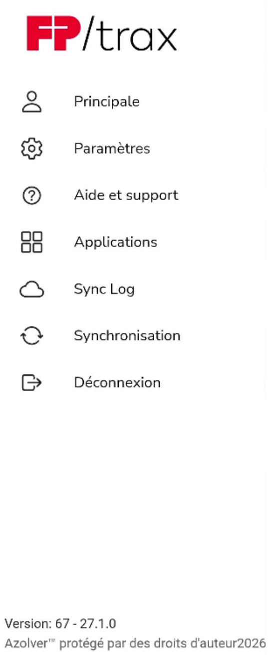
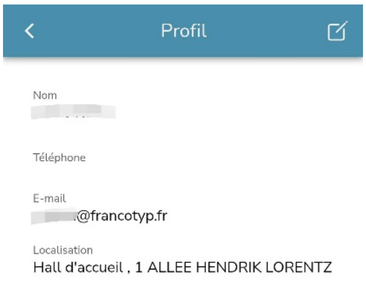


Fig. 26 Application mobile FP Trax > Menu

Cliquez sur **l'icône du menu hamburger** dans le coin supérieur gauche pour accéder au menu de l'application. La version installée de l'application est également affichée dans cette zone.

6.2.1 Profil



Ouvrez **Profil** pour afficher et modifier vos informations personnelles. Cliquez sur **l'icône d'enregistrement** dans le coin supérieur droit pour appliquer vos modifications.

Fig. 27 Application mobile FP Trax > Profil

6.2.2 Paramètres

Dans la section **Paramètres**, vous pouvez personnaliser l'application FP Trax selon vos besoins. Les paramètres sont organisés en différentes zones pour chaque module (comme les **boutons de statut** et la **configuration de l'application**) qui sont expliquées plus en détail dans les sections suivantes.

Remarque : En raison des réglages individuels, l'apparence et les fonctions disponibles de l'application peuvent varier d'un appareil à l'autre, même avec des identifiants de connexion identiques.

6.2.2.1 Paramètres > Boutons de statut

Dans **Paramètres › Bouton**, vous pouvez sélectionner les statuts d'expédition disponibles dans l'application. Ces statuts correspondent à ceux configurés dans l'administration web. Vous pouvez également masquer les boutons inutiles de l'écran d'accueil pour simplifier l'interface.

Fig. 28 Paramètres > Boutons de statut

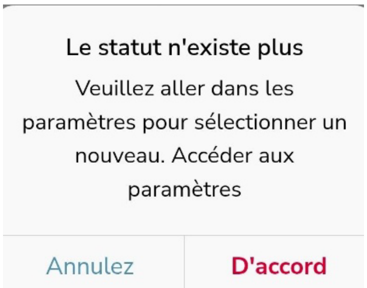


Fig. 29 Remarque › Le statut n'existe plus

Remarque : Si un statut a été modifié depuis votre dernière connexion, une erreur peut survenir lors de la connexion ou de l'ouverture du module concerné. Cela se produit parce que l'application n'applique pas automatiquement ces changements.

Dans ce cas, veuillez mettre à jour le statut concerné dans **Paramètres › Boutons.**

6.2.2.2 Paramètres > Configuration de l'application

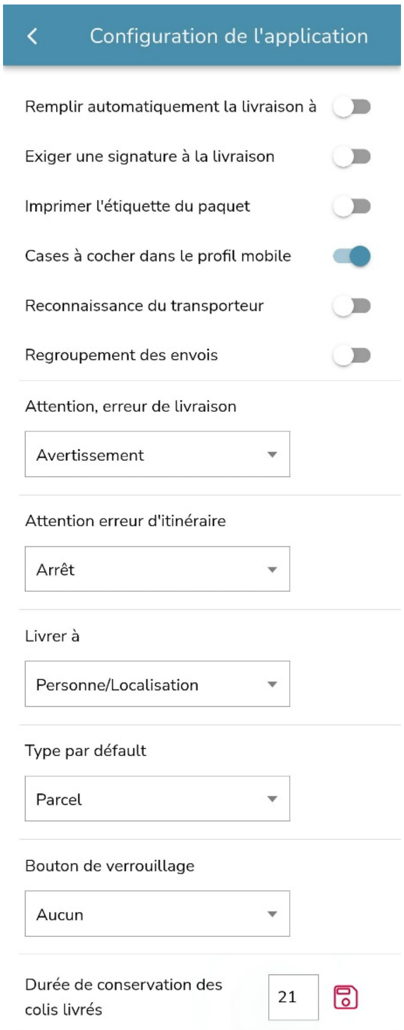


Fig. 30 Paramètres > Configuration de l'application

Dans Paramètres > Configuration de l'appli, vous pouvez effectuer les réglages suivants :

Remarque : Toutes les modifications apportées s'appliquent uniquement à l'appareil sur lequel elles sont effectuées.

Remplissage auto. « Livré à » :
Lorsqu'elle est activée, cette option saisit automatiquement le nom du destinataire d'origine dans le champ **Livré à**. Vous pouvez le modifier si le colis est remis à une autre personne.

Signature obligatoire à la livraison :
Cette option vous permet de spécifier si une signature doit être obligatoirement fournie lors de la remise d'un colis

Imprimer l'étiquette du colis :
Choisissez si vous souhaitez imprimer une étiquette lors de la création de colis via l'application mobile.

Cases à cocher du profil mobile :
Lorsqu'elles sont activées, des cases à cocher s'affichent dans la liste des colis, permettant de sélectionner les colis manuellement.

Reconnaissance du transporteur :
Cette fonction permet à l'application d'identifier automatiquement le transporteur approprié en se basant sur la logique du numéro d'expédition et de pré-remplir les informations du transporteur.

Regroupement d'envois :
Le système crée automatiquement un envoi unique lorsque plusieurs colis sont scannés pour le même destinataire.

Avertissements :
- Désactivez/activez les messages d'avertissement si le destinataire d'origine et le destinataire du message ne correspondent pas.
- Désactiver/Activer les alertes d'erreur d'itinéraire.

Options « Livré à » :
- Personne ou lieu (par défaut)
- Lieu + Texte, scannez le lieu et disposez d'un autre champ textuel pour saisir/scanner des données supplémentaires.
- Personne uniquement
- Lieu uniquement

Type par défaut : Sélectionner votre type de colis préféré lors de la création de paquets.

Jours de conservation des colis livrés : Spécifiez le **nombre de jours** pendant lesquels FP Trax doit conserver les données des colis livrés dans le **stockage local** de l'appareil mobile.

Remarque : Veuillez noter que la configuration de l'appli n'est disponible pour modification que si elle a été activée dans l'application web sous Administration > Rôles. Voir section *12.2.2 Rôles et permissions*

6.2.3 Applications

Fig. 31: Apps

Selon les produits FP Trax que vous avez achetés et activés, la section **Applications** vous permet de choisir entre les modules de gestion des colis, du matériel (actifs) et du courrier.

6.2.4 Journal de synchronisation

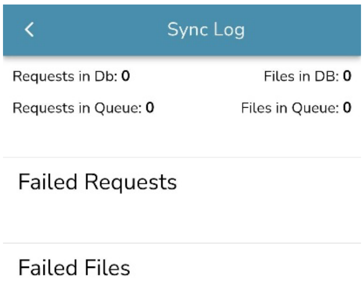


Fig. 32: Sync Log

Cette section permet d'accéder à la **fonction de journalisation** de votre application FP Trax. Les journaux d'événements (logs) aident à identifier et à comprendre tout comportement inattendu ou incorrect de l'application.

Si vous contactez le support technique, veuillez préparer ces informations afin de faciliter le dépannage.

6.2.5 Mode de synchronisation / hors ligne

Fig. 33: Sync Log

Si vous utilisez l'application FP Trax en **mode hors ligne** ou si la connexion Internet est instable, vous devez lancer manuellement la synchronisation des données dès qu'une connexion est disponible.

Pour ce faire, ouvrez le **menu principal** sur le côté gauche de l'application FP Trax et sélectionnez **Synchronisation**.

Pendant le processus de synchronisation, un message accompagné d'une barre de progression s'affiche.

6.2.6 Déconnexion

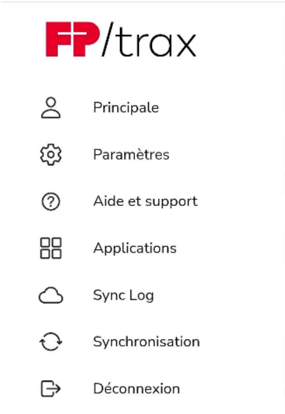


Fig. 34: Sync Log

Déconnectez-vous de **l'application mobile FP Trax** lorsqu'elle n'est pas utilisée afin d'empêcher tout accès non autorisé par des tiers.

7 Suivi des colis / Suivi des colis (+/Pro)

7.1 Informations générales – Suivi des colis (+/Pro)

7.1.1 Colis professionnels

Après avoir configuré le système et téléchargé les données utilisateurs, vous pouvez désormais gérer vos colis professionnels en toute simplicité : saisissez les données des colis et les destinataires dans le système, envoyez automatiquement vos notifications personnalisées et livrez les envois de la manière qui convient le mieux aux processus de votre entreprise. Voir également la *section 7.1.3 Options de livraison de colis.*

7.1.2 Colis privés

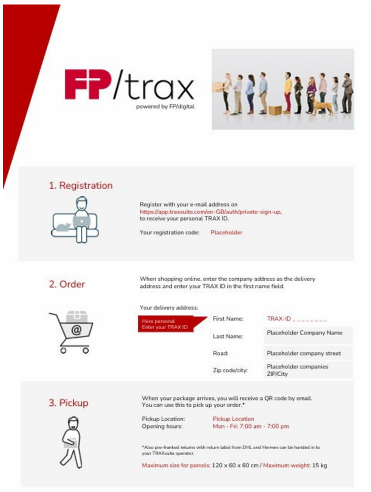


Fig. 35 Notice « Comment ça marche »

[illegible]

[illegible] **colis privés** [illegible]

[illegible] **FP Trax** [illegible]

Un effort minimal pour vous, une vraie valeur ajoutée pour votre équipe.

Comment ça marche

Alors que les destinataires professionnels sont gérés directement dans le système **FP Trax**, nous pouvons vous fournir un code d'inscription pour l'utilisation privée de TRAX. Les employés peuvent utiliser ce code pour s'inscrire volontairement sur :

https://app.traxsuite.com/fr/auth/private-sign-up

Lors de son inscription, chaque collaborateur reçoit un **identifiant personnel TRAX ID**. Cet identifiant est utilisé dans l'adresse de livraison à la place du nom de l'employé. Il vous permet de distinguer clairement les **colis privés des colis professionnels** et de les traiter différemment lors de la réception.

Lors de l'enregistrement d'un colis, il vous suffit de :

- Saisir le **TRAX ID** dans le champ *Nom*.
- Créer un type de colis supplémentaire, par exemple **« Privé »** (voir section *7.6.1 Type de colis*).
- Configurer une **notification de retrait spéciale** contenant un **code QR** (voir section *7.6.6 Notifications*).

C'est tout ! Vous offrez déjà à vos équipes un **avantage pratique qui leur fait gagner du temps**.

Contactez notre équipe FP Trax pour en savoir plus.

7.1.3 Options de livraison de colis

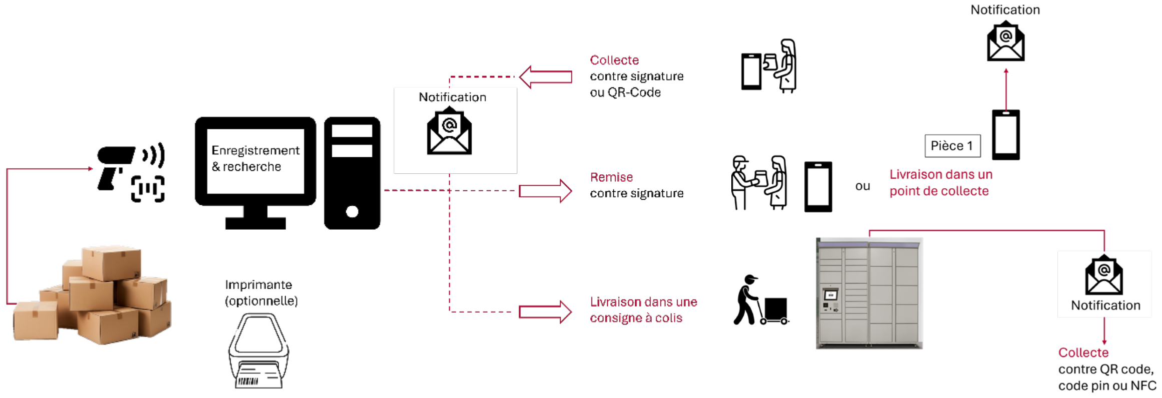


Fig. 36 Aperçu des options de livraison

FP Trax prend en charge plusieurs options de livraison pour les colis professionnels et privés, notamment le retrait dans des lieux définis, la remise en main propre et les consignes à colis. Les destinataires sont automatiquement informés lorsque leurs colis sont prêts à être retirés.

7.1.4 Documentation des bordereaux de livraison conforme aux exigences d'audit

With **FP Trax**, you can capture delivery notes and other relevant documents for each shipment and store them in an **audit-proof** way.

To do this, simply capture a document using a **photo or scan** and attach it either during the shipment creation process or later in the transaction details (see the relevant section for document upload).

The stored documents are always available in **PDF format** within the shipment details and can be downloaded at any time.

The stored shipment information is available at any time in PDF format in the shipment details and can be downloaded from there (see *7.5.1 Parcel delivery > Status change (web app)*).

Please ensure that all archiving activities comply with the applicable retention requirements.

(*12.6* Archiving).

7.1.5 Before we start...

Before you start **registering parcels**, you need to configure the system according to your individual requirements. Detailed instructions can be found in the relevant setup section.

After onboarding, the **FP Trax team** has already entered your company data and created **administrator access** for you. With this access, you can customize the FP Trax environment to match your workflows and make full use of the system.

If preferred, you can also complete the setup together with the FP Trax team during your onboarding session.

7.2 7.2 The Dashboard

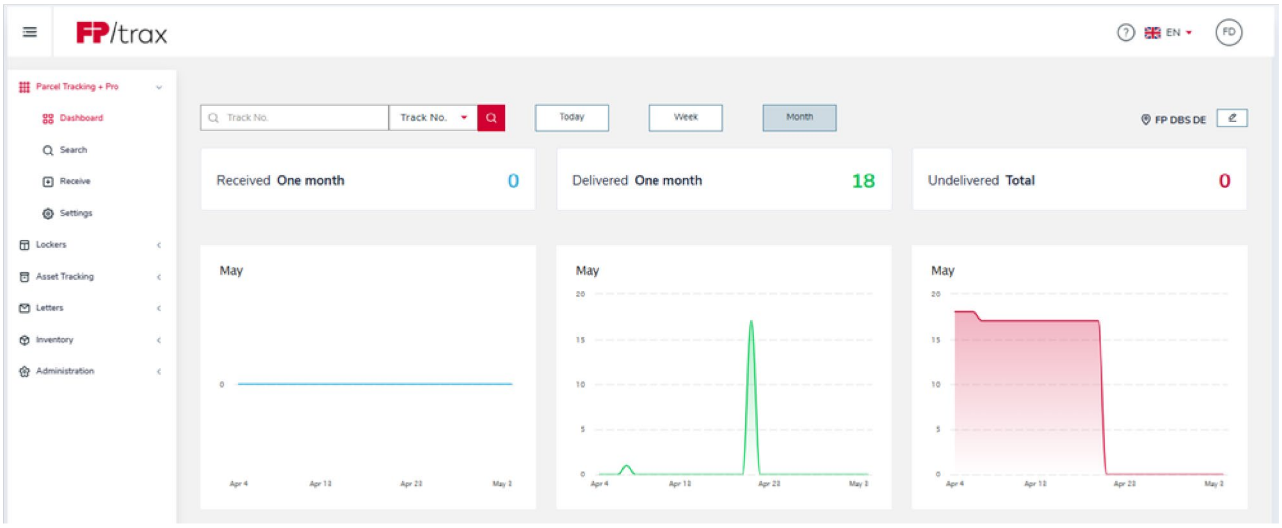


Fig. 37 Dashboard

With appropriate authorization, the dashboard provides an overview of all **received**, **delivered**, and **undelivered parcels** for a selected location. By default, the dashboard displays data for the **current day**.

You can switch to a **weekly** or **monthly** view, or search for specific shipments using the search field. When searching, you can choose between **consignment number** search and **free-text** search.

To change the location, click the **pencil icon** next to the location name. The dashboard content is then filtered according to the selected location.

7.3 7.3 Search

7.3.1 7.3.1 Search (web app)

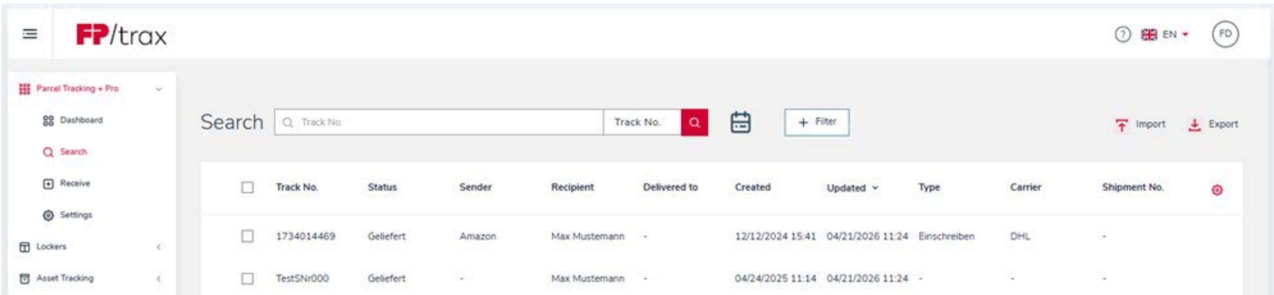
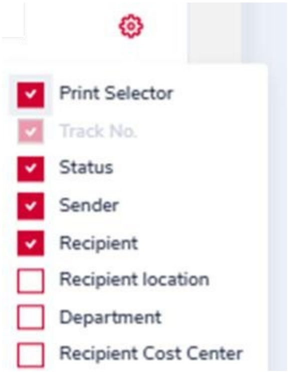


Fig. 38 Parcel overview

The menu item "Search" takes you to the Parcel overview. In the list of Parcels, all non-archived Parcels are listed (cf. *12.6* Archiving). You can use the search function to search and filter for any parameter.

7.3.1.1

7.3.1.1 Parcel Overview > Column Customization



The columns of the Parcel listing can be individually adjusted according to your needs via the gear icon in the label line. Activate or deactivate the individual parameters in the table by clicking on the checkbox.

Fig. 39 Selection criteria for the Parcel overview

7.3.1.2

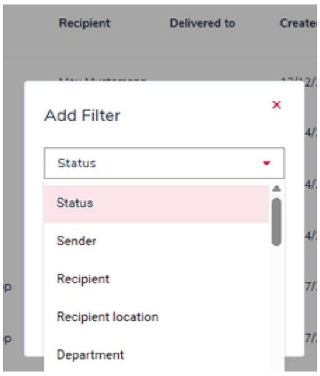
7.3.1.2 Search > Search by tracking number or free text

You can search specifically for shipment numbers or for any parameters for the parcels using the free text field.

Fig. 40 Customize the search box

7.3.1.3

7.3.1.3 Search > Filter

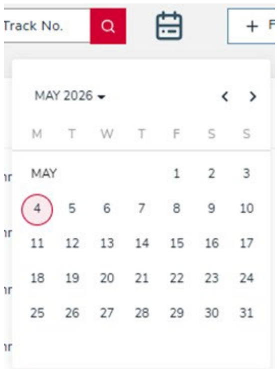


You also have the option of filtering the Parcel list by different parameters to further narrow down the results.

Fig. 41 Filter selection Search field

7.3.1.4

7.3.1.4 Search > Filter time period



Use the **calendar icon** to filter the parcel list by a selected time period. Choose a start and end date to apply the filter.

Fig. 42 Filter selection period

7.3.1.5 7.3.1.5 Reprint parcel label

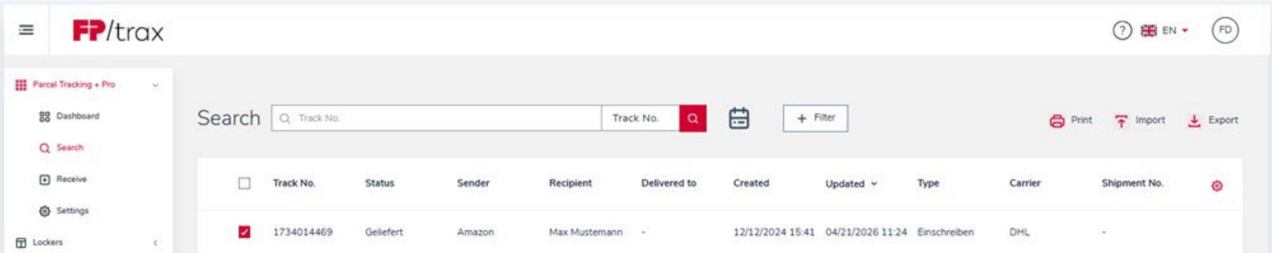


Fig. 43 Reprint parcel label

In the **Parcel list**, select the shipment whose label you want to print again.

Once selected, a **button appears next to the search bar**. Click this button to **reprint the label**.

7.3.2 7.3.2 Import and export of Parcel data

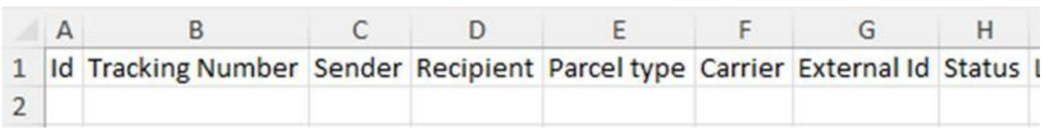
To manage several data records at the same time, the import or export function is a good option.

7.3.2.1 7.3.2.1 Manual data import

For the **initial creation** of parcel data, download the template by clicking on the "Import" button in the "Search" area. In the newly opened dialog box, you will then download a template in .xlsx or .csv format. After adding the data and editing the file, drag and drop it into the upload area or alternatively use the browser upload function

Note: If you want to update existing data in the system, please use a current data export. See also *7.3.2.2 Parcel Data Export.*

Fig. 44 Data import



	A	B	C	D	E	F	G	H
1	Id	Tracking Number	Sender	Recipient	Parcel type	Carrier	External Id	Status
2								

Fig. 45 Import file

Please note the mandatory fields for the upload: tracking number and recipient. In the Recipients column, enter either the user name or the External ID (=TRAX ID in TRAX Private) of the user.

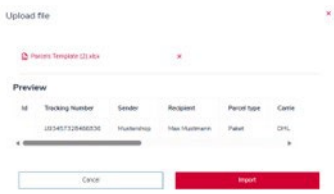


Fig. 46 Data Import Preview

Before completing the import, a **preview of the data** is displayed. Review all records carefully and click **Import** to proceed.

To cancel the import, click **Cancel** or close the window by selecting the **X** in the upper-right corner.

After the import, a **summary of the results** will be displayed.

If the upload fails, an **error report** will indicate which records need to be corrected. After making the necessary changes, you can upload the file again.

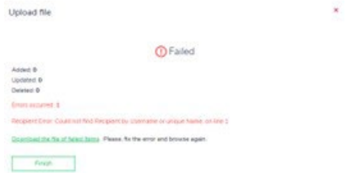


Fig. 47 Error Analysis Import

Click **Finish** to complete the process. After a successful upload, a confirmation message appears. The imported parcel data is available in the Search section.

Note: Imported parcels receive the initial status. To prevent notifications, use a parcel type without notifications and ensure no notification is set for the initial status.

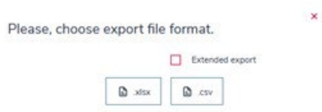
Fig. 48 Successful import

7.3.2.2 Parcel Data Export

Use the **export function** to review and update multiple parcel records at once.

Click **Export**, select the desired format (**.xlsx** or **.csv**), and the file will be downloaded automatically to your device.

Fig. 49 Parcel Data Export



If the **Extended Export** option is enabled, the file will include not only the latest shipment status but also the **full status history with timestamps** for each parcel.

Note: If the parcel list has been filtered beforehand, only the filtered data will be exported.

Modify records: Edit the data in the exported file and save your changes. **Note:** Status changes cannot be made via import.

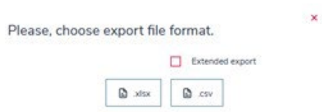
Add new records: To add new parcels, simply enter them in additional rows at the end of the file.

Note: Records without a system ID are treated as new entries and may be added as duplicates.

After completing all changes, upload the file again using the **import function (see** Cf. *7.3.2.1 Manual data import*).

7.3.2.2 7.3.2.3 Bulk Deletion

To delete multiple parcels at once, use the import/export function.



Export and download the excel file including parcels in the excel file format from the Parcel Search page

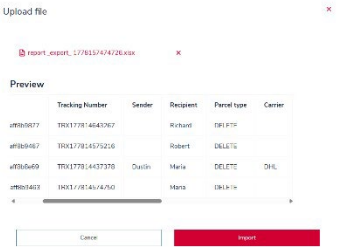
Fig. 50 Parcel Data Export

	A	B	C	D	E	F
1	Id	Tracking Number	Sender	Recipient	Parcel type	Carrier
2	69fc5c863a1fde4aff8b9877	TRX177814643267		Richard	DELETE	
3	69fc59de3a1fde4aff8b9467	TRX177814575216		Robert	DELETE	
4	69fc54c03a1fde4aff8b8e69	TRX177814437378	Dustin	Maria	DELETE	DHL
5	69fc59d73a1fde4aff8b9463	TRX177814574750		Maria	DELETE	
6	69fc553a3a1fde4aff8b8f1a	TRX177814454906		Maria	DELETE	
7	69fc4e853a1fde4aff8b8677	TRX177814283990		Margus Luik	DELETE	
8	69fc42b33a1fde4aff8b7896	TRX177813982274		Robert	DELETE	
9	69fc42aa3a1fde4aff8b7889	TRX177813981242		Maria	DELETE	
10	69fc43dd3a1fde4aff8b7a0c	TRX177814011921		Richard	Parcel	

Fig. 51 Delete parcels

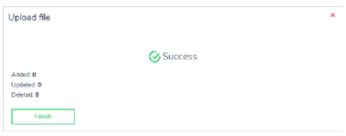
In the excel file, mark the parcels you wish you delete with **DELETE** command in the **Parcel type** column (capital letters).

Save the File and Import it again from the Parcel search page❼ *7.3.2.1 Manual data import*. **Note**: None of other columns should be removed or changed.



Preview of imported items shown. Everything looks good – click on the **Import** button.

Fig. 52 Preview Parcel data upload



Upload report message about the success. Click **Finish** button to close the window.

Fig. 53 Successful upload

7.3.3 7.3.3 Parcel Details (Web app)

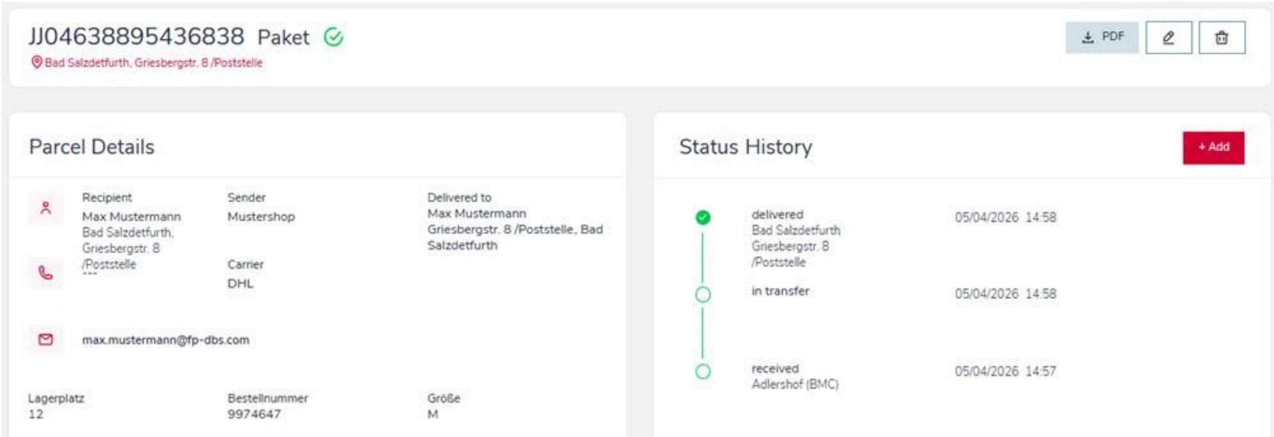


Fig. 54 Detailed view of the parcel

Click on a tracking number line in the list to open the **parcel details**.

In the detail view, you can see key information about the **recipient** and the **shipment**. If photos are available, you can access them using the corresponding icons. Click the **info icon** to view additional details about the shipment status.

For delivered shipments, the **signature** is displayed if it was captured at handover.

For shipments with a final status, you can generate and download a **PDF record** by clicking the **PDF** button.

Depending on your permissions, you can **edit or delete** shipment details using the **pencil** or **trash can icon**.

You can also add a new status by clicking **Add** in the **Status History** section—for example, to mark a parcel as delivered.

7.3.4 7.3.4 Parcel search and Parcel details (Mobile app)

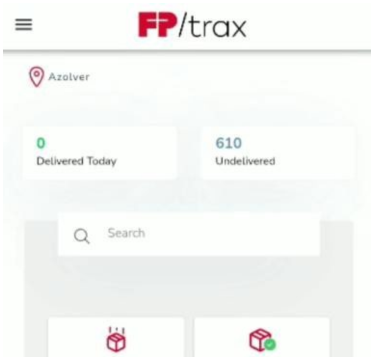


Fig. 55 Home screen of the app

There are several ways to search for a shipment in the app:

1. **Home Screen › Search field**

Enter a **tracking number** or a search term and start the search to find the desired shipment.

2. **Home Screen › Delivered Today**

Tap **Delivered Today** to view parcels delivered on the current day. You can also use the search field to look for specific shipments within today's deliveries.

3. **Home Screen › Undelivered**

Tap **Undelivered** to view shipments that have not yet been delivered. A search field is also available to filter the list.

To view the details of a shipment, swipe right over the displayed shipment

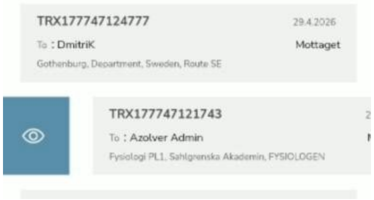


Fig. 56 Open Parcel details

and click on the eye icon.

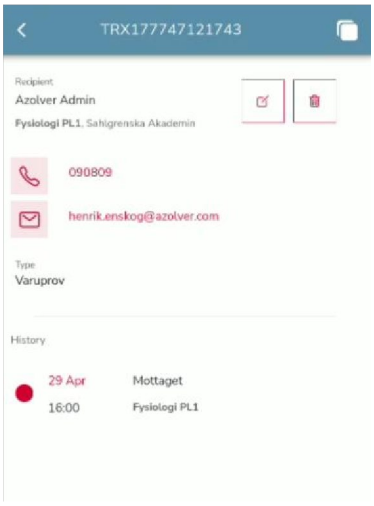


Fig. 57 View Parcel details

Depending on your permissions, you can view the shipment details and **edit or delete** them using the **pencil** or **trash can icon**.

In the header line displaying the **consignment number**, you can copy the number by clicking the **copy icon**.

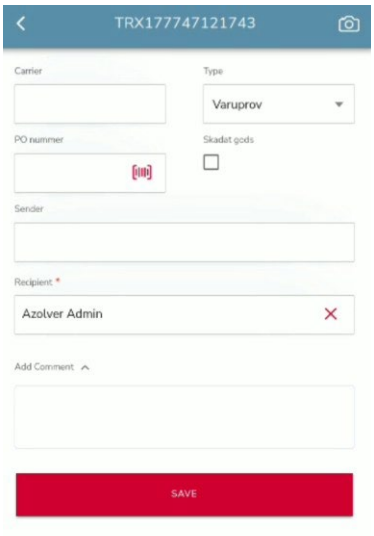


Fig. 58 Edit Parcel

In edit mode, you can change details about the sender, carrier, recipient and parcel type, as well as the details in your extra fields, add comments or photos, or choose delivery to a locker if you have one.

To save the changes, click on the "save" button.

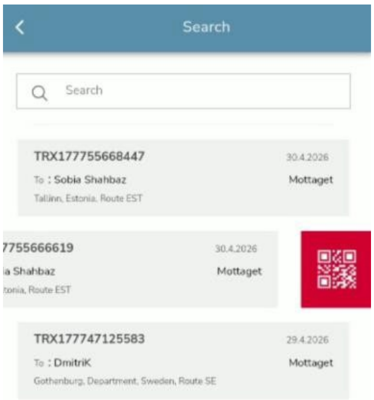


Fig. 59 Show parcel QR code

Swipe left on the shipment you want to view, then tap the **QR code icon** to display the shipment's QR code.

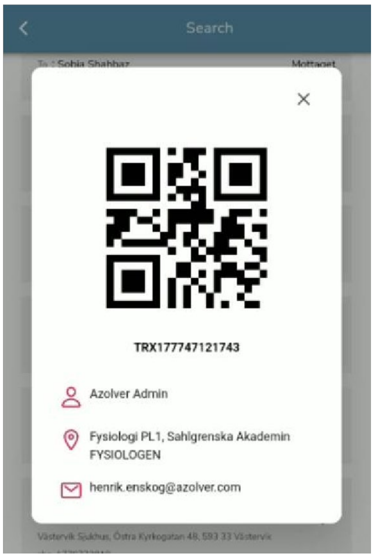


Fig. 60 QR code

By tapping the QR code on your mobile phone, you can process the parcel—such as storing it in a parcel locker—without holding the device up to a scanner.

7.4 7.4 Receive Parcels

7.4.1 7.4.1 Create a parcel (web app)

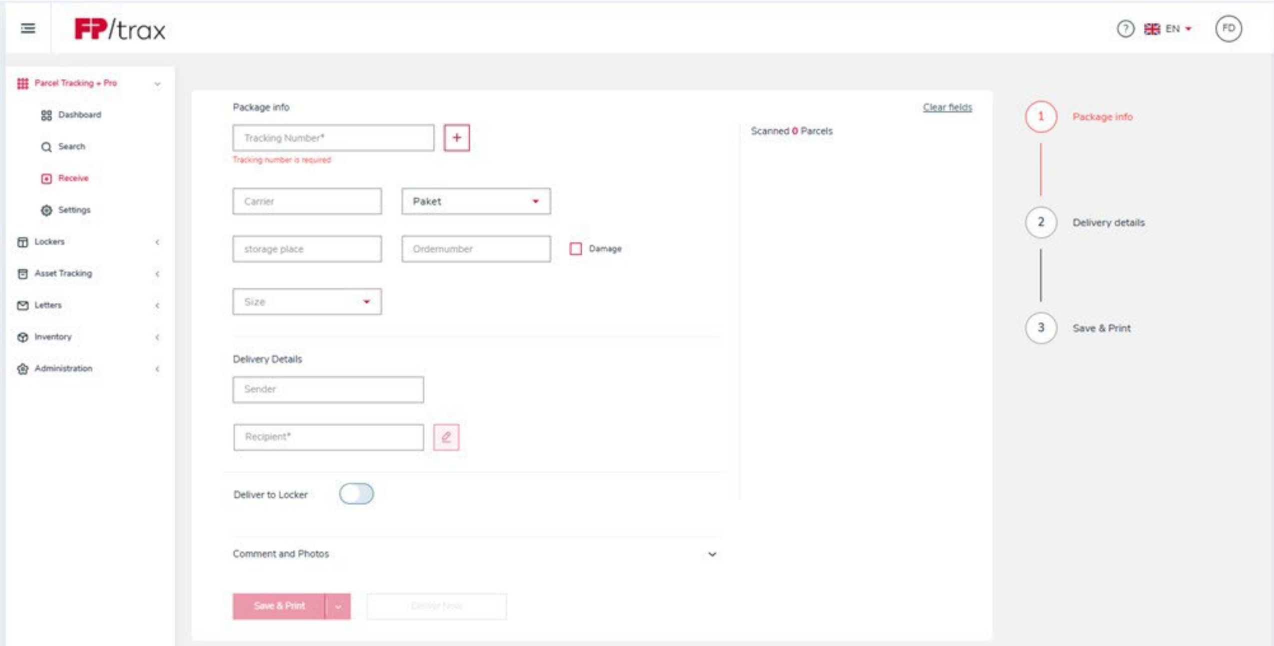


Fig. 61 Capture parcel

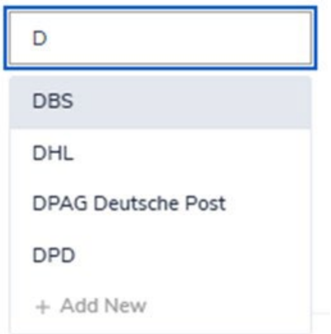
To create a parcel, click on the "Receive" submenu item in the "Parcel Tracking" area. Only two mandatory fields need to be filled: the shipment number (for clear identification) and the recipient. All other information is optional.

The input fields can be changed due to your individual configuration (cf. *7.6.3 Extra fields*) from those shown in the example screenshot.

7.4.1.1 Entering the tracking number

Enter the **tracking number** by either scanning it with a handheld scanner (click in the field and perform the scan) or by typing it manually.

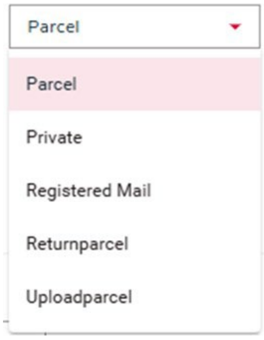
If no tracking number is available, click the **plus (+) icon** to automatically generate a unique tracking number.



7.4.1.2 Selecting the carrier

Start typing to search for a carrier and select it from the list. If it is not available, you can create a new one during parcel registration.

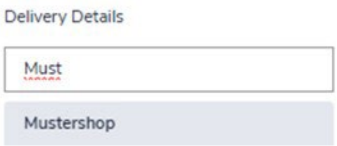
Fig. 62 Select or add logisticians



Selecting the type of the shipment

Select a shipment type from the drop-down menu. Here *7.6.1* Learn how to create a new Parcel type and set a default value.

Fig. 63 Select Parcel Type

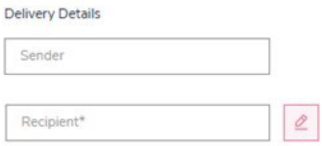


7.4.1.3 Selecting the sender

Enter the first few letters and select a sender from the list you have created so far. If the sender has not yet been created, add a new sender during the consignment entry process or follow the steps in section *12.1*

Contacts

Fig. 64 Select or add sender



7.4.1.4 Selecting the recipient

Enter the first few letters in the recipient field and select a recipient from your list. If the recipient is not known to the system, add a new recipient during shipment entry or follow the steps in section *12.1 Contacts* .

Please note that recipients can only be notified if an email address has been entered and a notification has been set up in the system.

Fig. 65 Select or add recipients

Fig. 66 Add comment and photo

7.4.1.5 Add comment and photos

You can add additional information about the **shipment** in the **Comments and Photos** section. This includes entering text or attaching images.
To take a photo, click **Camera** to open your device's camera. If a desktop scanner is connected, you can use it as an alternative. Capture the image and click **Save** to attach it, or click **Repeat** to discard and take a new photo. You can add multiple images by repeating this process.

To upload an image from your device, click **Browse** and select the file from your folder. This allows you to attach documents such as delivery notes and store them in an **audit-proof manner**.

Note: Please ensure that you comply with the applicable **legal retention periods** when archiving documents.

(See section *12.6* Archiving)

7.4.1.6 Create a parcel

You can create and save a shipment by selecting one of the available options:

- **Save & Print**
  Creates a new parcel in the system and **prints a parcel label**.
- **Save**
  Saves the parcel in the system **without printing a label** (available via the drop-down menu).
- **Deliver now**
  Creates the parcel and **marks it as delivered immediately**. This option is useful for shipments that are handed over directly to the recipient without additional processing steps.

Note: Parcels created using this option will be **notified only once**, and **no reminder messages** will be sent.

You can find the settings for this in section *7.6.8.2 Deliver Now Button* .

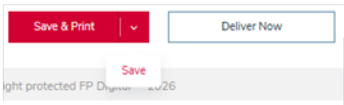


Fig. 67 Save

7.4.1.7 Parcel label printing

If label printing is enabled, a parcel label is printed automatically for further processing.

Note: We recommend using coloured labels to make it easier to identify them during further processing of shipments.

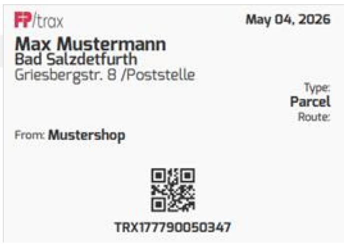


Fig. 68 Parcel label

7.4.2 7.4.2 Create a Parcel (Mobile App)

You can also receive and create parcels using the mobile app.

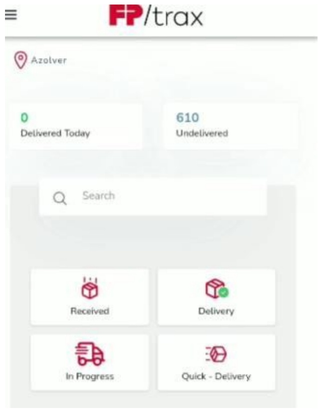


Fig. 69 Homescreen

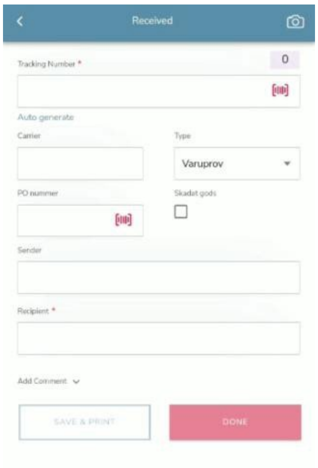


Fig. 70 Parcel data input field

To create a **parcel**, tap the **first tile** on the home screen to open the **parcel create form**.

In most cases, you only need to fill in **two fields**:

- the **tracking number** (for unique identification)
- the **recipient**

All other fields are optional.

Please note that the available input fields may differ from the example shown, depending on your individual configuration (see section **7.6.3 Extra Fields**).

To scan a parcel number, tap the **barcode icon** to open the scanner. If the parcel does not have a tracking number, tap **Auto generate** to create a unique identification number automatically.

Once a parcel has been scanned, it will appear in the **Scanned Items** list below.

Fig. 71 Enter logistician

Fig. 72 Selection of shipment type

Clicking on the "**Carrier**" field opens the display of the delivery drivers stored in the system. Enter the first letters and select the logistician from the selection.

Select the desired shipment type from the "Type" drop-down menu.

Fig. 73 Enter recipient or sender

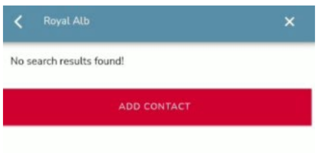
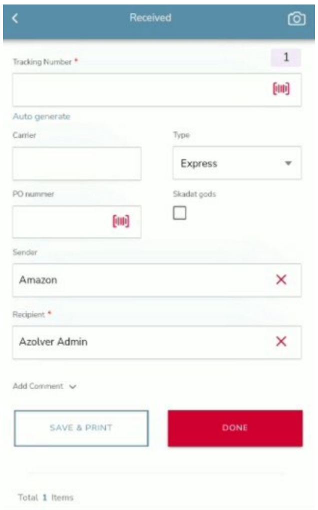


Fig. 74 Add sender or recipient

To enter the **sender** or **recipient**, type the first few letters in the input field and select a suggestion. If you don't see a matching contact from the contacts already stored in the system, you can add it.



To add a photo, click the **photo icon** in the upper-right corner. This opens the camera, allowing you to take pictures.

You can also enter a comment in the **Add Comment** field if needed.

Once all required information has been entered, the **Save & Print** and **Done** buttons become active:

7.4.2.1 • Save & Print

Saves the shipment(s) and displays a cleared input form, allowing you to continue entering additional shipments.

7.4.2.2 • Done

Saves the shipment(s) and returns you to the **main menu**.

Fig. 75 Input

7.4.3 7.4.3 Shipment Bundling (Parcel Tracking Pro)

Shipment bundling simplifies handling when multiple shipments are delivered to the **same recipient** or **same location**.

Instead of processing each shipment individually, shipments can be handled **together in a single step**, improving efficiency and reducing processing time.

This feature is available with the **Parcel Tracking Pro** version.

7.4.3.1 7.4.3.1 Creation of a shipment

Shipments can be created in two ways:

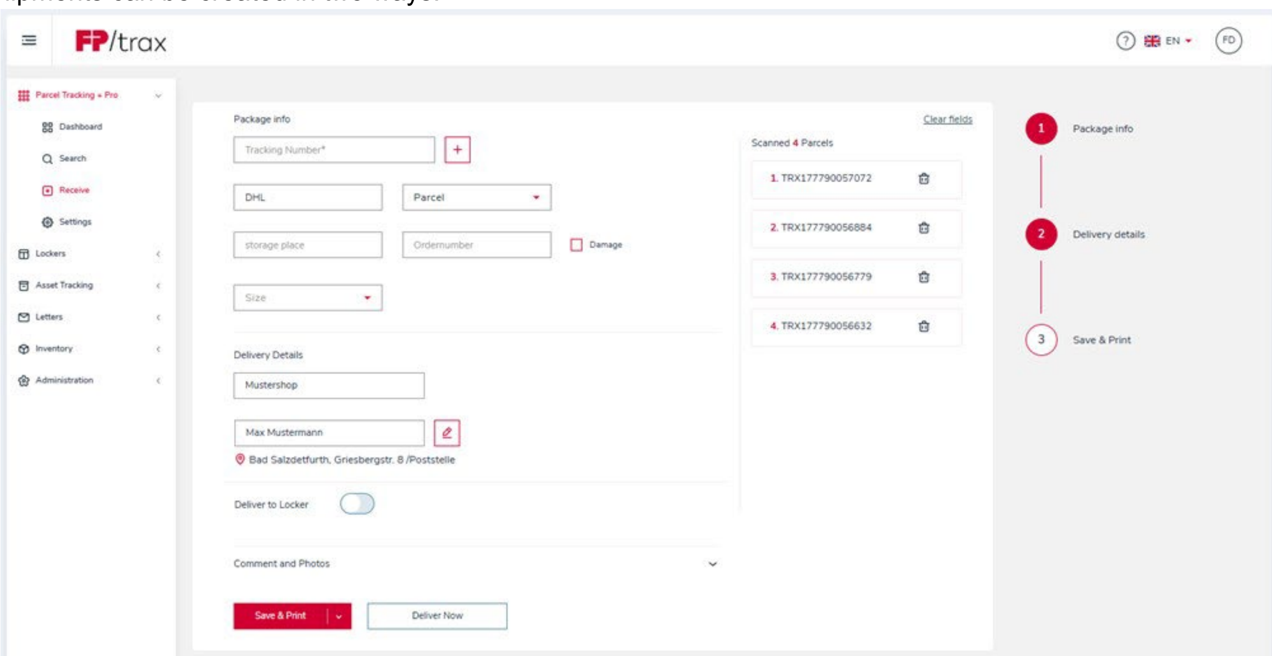


Fig. 76 Capture of a shipment with the same parcel data for the same recipient

7.4.3.2 1) Create consolidation with shipment entry (available in the web app and in the FP Trax mobile app)

When several parcels for the same recipient share common data, they can be registered together as a shipment by scanning multiple tracking numbers and entering the shared information once.

Fig. 77 Example Label Shipment Bundling

Once a **shipment** has been successfully created, the system can automatically print **parcel and shipment labels**, depending on your configuration.

The **parcel labels** are similar to those used for individual parcels. The **shipment label**, however, includes additional information such as:

- the **recipient name**
- the **shipment number** (encoded in the barcode or QR code)
- the **number of parcels** included in the shipment

.

7.4.3.3 2) Adding to an existing shipment.

Adding parcels to an existing shipment can only be performed in the FP Trax app by a user who has a mobile profile assigned (see section 7.6.4 Mobile ProfilePro).

This function is used to **combine multiple parcels into an existing shipment**.

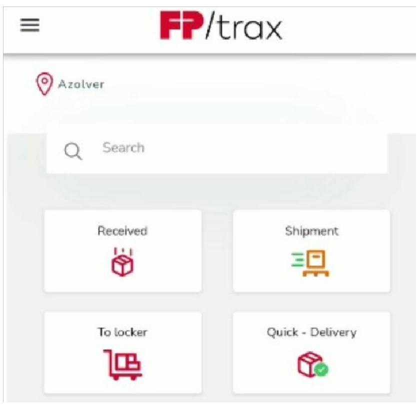


Fig. 78 FP Trax App > Startbildschirm (Mobile Profile)

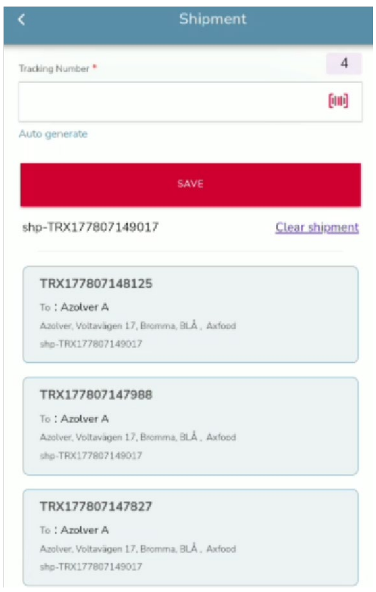


Fig. 79 Create a new shipment and assign shipments

To do this, tap the **Shipment** tile and **scan an existing shipment ID label** and then, scan the additional parcels that you want to add to that shipment.

To complete the process, tap **Save**.

This also allows you to register parcels for **different recipients** and with **different parcel details** into a single consolidated shipment.

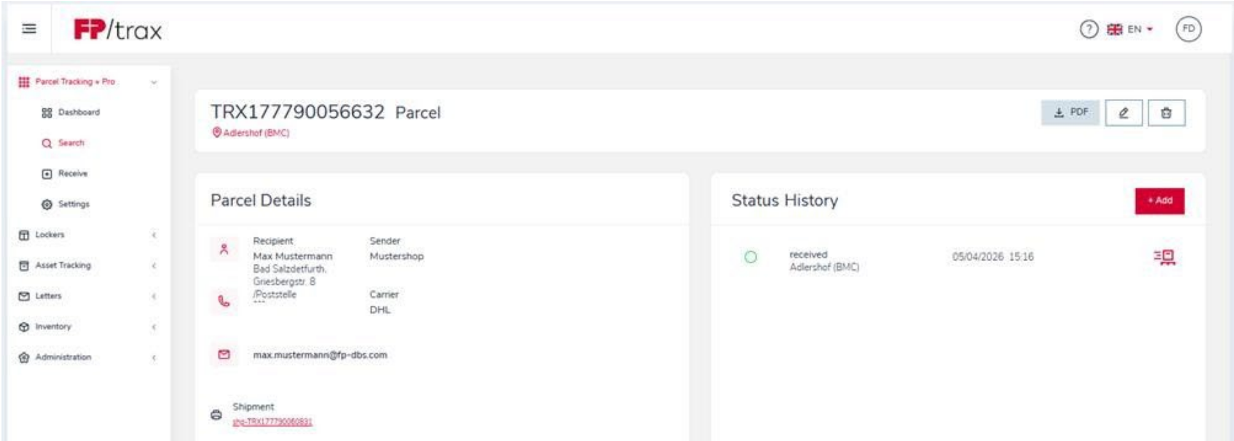


Fig. 80 Capture parcel

To reprint a label, open the shipment details via **Parcel Tracking Pro › Search**, then click the **printer icon** next to the shipment number to open the print dialog.

7.4.3.3.1 7.4.3.2 Processing a shipment consolidation

You can add additional parcels to an existing **shipment** by using the **Shipment** tile in the **FP Trax mobile app**.
Scan or enter the **shipment's tracking number** in the **Tracking Number** field. The shipment, including its unique identifier and already assigned parcels, will be displayed.

Next, scan the parcels that have already been registered in the system. Finally, click **Save** to add the scanned parcels to the shipment.

7.4.3.3.2 7.4.3.3 Change of Status of a Shipment Consolidation

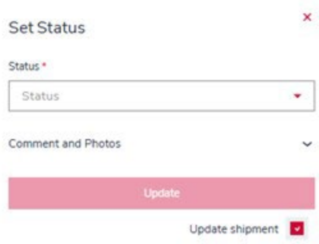


Fig. 81 Change in the status of shipment bundling

To update a **shipment** in the web app, go to

Parcel Tracking Pro > Search and enter the **shipment number (shp number)** in the search field.

Open one of the shipments assigned to the shipment by clicking on it. In the **Status History** section, click **Add** to open the status change window.

Select the desired status from the drop-down menu and enter any additional information required.

To update all shipments in the shipment, activate the **Update entire shipment** option before clicking **Update**.
If this option is not selected, only the chosen shipment will be updated, and it will be **removed from the shipment**.

7.5 7.5 Parcel delivery

7.5.1 7.5.1 Parcel delivery > Status change (web app)

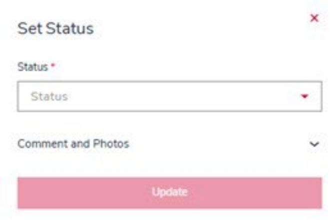


Fig. 82 Change of status

Use the search function to find the desired shipment and open the Parcel details. Cf. *7.3.3 Parcel Details (Web app)*.

In the Parcel details, click on the "Add" button in the "Status History" area, select the final status "Deliver" from the dropdown.

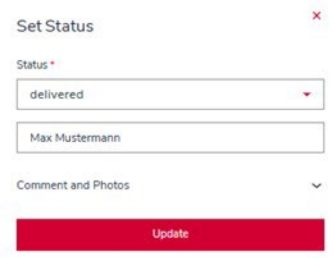


Fig. 83 Status Change Recipient Selection

After selecting the **final status**, the **recipient field** will be displayed. The original recipient’s name is automatically pre-filled, but you can adjust it if needed.

You can also add a **comment** or attach a **photo** to the status update.

Fig. 84 Confirmation of status change

If the shipment has already been assigned a final status, please confirm that you want to change the status again.

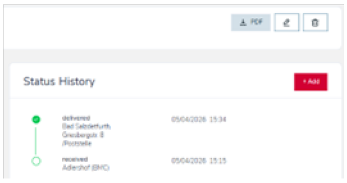


Fig. 85 Download proof of delivery

If a shipment has the final status, such as "delivered", you can create a proof of delivery in pdf format in the shipment details and save or print it.

7.5.2 7.5.2 Delivery (Mobile App)

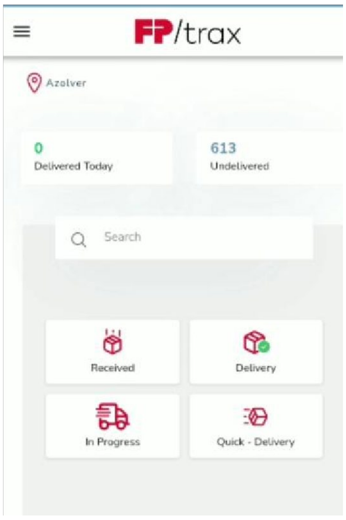


Fig. 86 Home Mobile app

On the main screen of the **FP Trax mobile app**, tap the **Delivery** tile to deliver a parcel.

Note: Status names can be customized in the settings. Any changes made there are also reflected in the button names displayed in the mobile app.

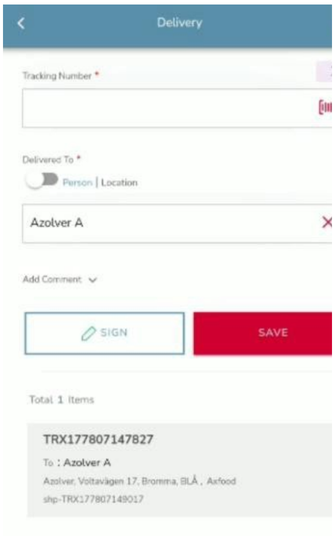


Fig. 87 Delivery screen

Start scanning the tracking number of the TRAX label.

If you want to deliver multiple parcels to the same recipient, continue scanning the additional parcels. The total number of scanned parcels is displayed in the **upper-right corner**.

If needed, you can add a **photo** (tap the icon in the upper-right corner to open the camera) and/or enter a **comment**.

Next, select the **recipient** for the delivery.
If delivery to a location is allowed, tap **Location** and then scan the **location label** to complete the delivery to that location.

Note: In the app menu > Settings > App Config, you can, for example, set that when a Parcel is scanned, the original recipient is already pre-filled in the "delivered to" area and that you only have to make changes for a different person. Cf. To this end, *6.2.2.2 Settings > Status Buttons* . If the app config is grayed out, please have an administrator check your permissions. The Administration > Mobile App Configuration permission should be enabled for your role. Cf. To this end, *12.2.1 Create, edit, and delete roles*

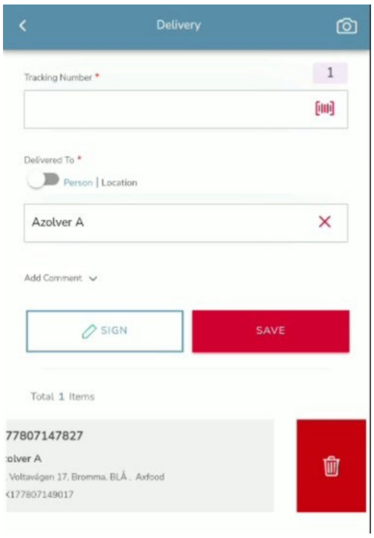


Fig. 88 Delivery screen

Parcels that were incorrectly scanned for delivery can be removed from the scanned list.

To do this, scroll down the list and **swipe left** on the parcel you want to remove. The **trash can icon** appears. Tap it to delete the parcel from the list.

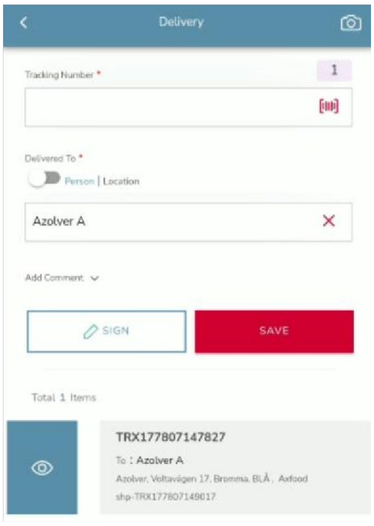


Fig. 89 Delivery screen

To view the details of a parcel, scroll down the screen, select the parcel by swiping from left to right on the shipment.

The **eye icon** appears. Click on it to view the parcel details.

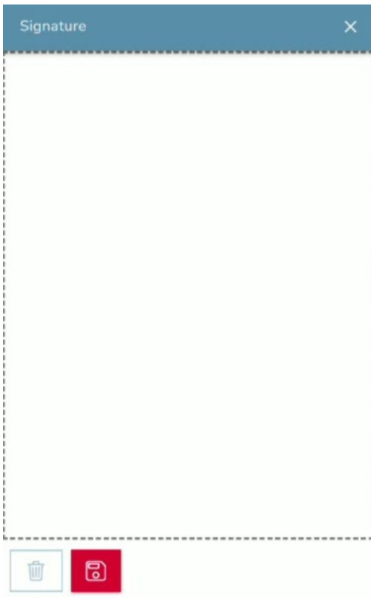


Fig. 90 Signing

Depending on your personal process specifications, a signature may be required from the person receiving the consignments. To do this, click on the Signature button.

It opens an input field where you can sign. To confirm the entry, click on the Save/Disk icon. To discard the input, click the delete/trash can icon.

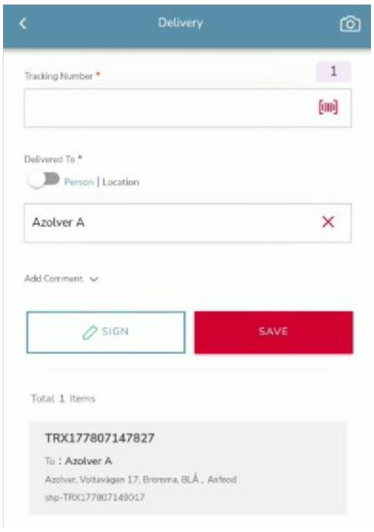


Fig. 91 Confirm Delivery

To finish the delivery process, confirm the entries/changes made by clicking on the "Save" button.

The FP Trax app will automatically be redirected to the home screen. The number of “delivered today” increases, while the number of "undelivered" decreases by the same number.

7.6 7.6 Settings

7.6.1 7.6.1 Parcel Type

Fig. 92 Parcel Type

To create a new parcel type, click **Add**.

Enter a name for the parcel type. This type will then be available to processing employees as a selectable option in a **drop-down menu** during parcel registration.

Click **Create** to save the new parcel type.

Why different Parcel types? You can create different notifications for each Parcel type (see section *7.6.6 Notifications*). For example, if you handle both **private and business parcels** and apply different delivery processes, it is recommended to create a separate parcel type, such as **"Private"**.

This allows you to define different handling procedures, for instance:

- **Private parcels** can be made available for **collection**

7.6.1.1 • **Business parcels** can be **delivered directly to the workplace** after prior notification

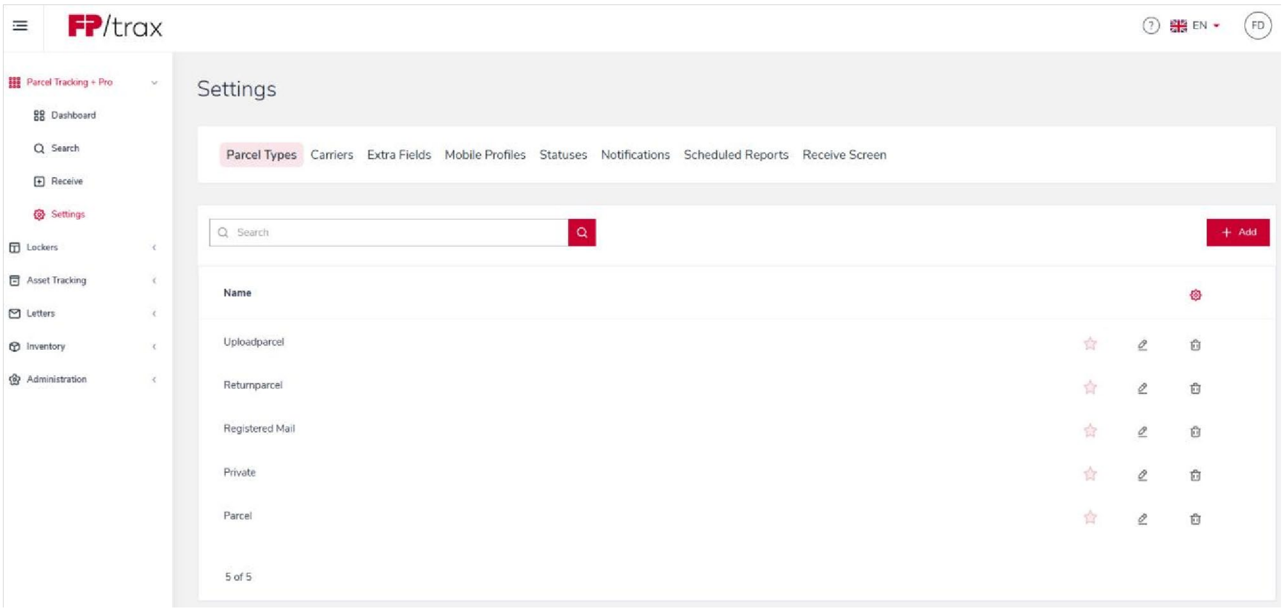


Fig. 93 Collection Parcel Type

In the list of **parcel types**, you can mark a type as a favorite by clicking the **star icon** on the right side of the row.

The selected parcel type will then be **preselected by default** in the drop-down menu during parcel registration. You can still change it manually if needed.
For this reason, we recommend marking the **most frequently used parcel type** as a favorite.

You can edit a parcel type by clicking the **pencil icon**, and delete it by clicking the **trash can icon**.

7.6.2 7.6.2 Carriers

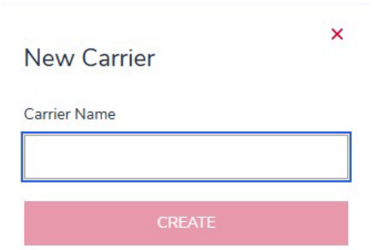


Fig. 94 Logistician

Define a list of carriers for selection. Start typing to filter the list. New carriers can also be added during parcel registration. See more in section *7.6.2 Carriers*

Enable **Carrier Recognition** to automatically assign the carrier based on the tracking number. Always review the suggested carrier and correct it if needed.

Fig. 95 Carrier recognition

7.6.3 7.6.3 Extra fields

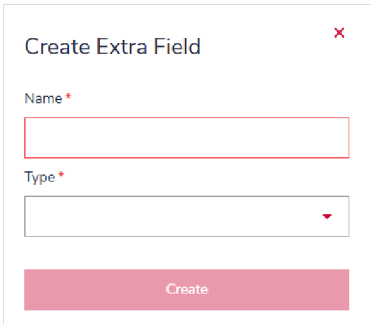


Fig. 96 Extra fields

You can create up to **six additional fields** and define their type based on your needs:

- **Text** – for free text input
- **Dropdown List** – for selecting from predefined options
- **Checkbox** – for yes/no or property selection

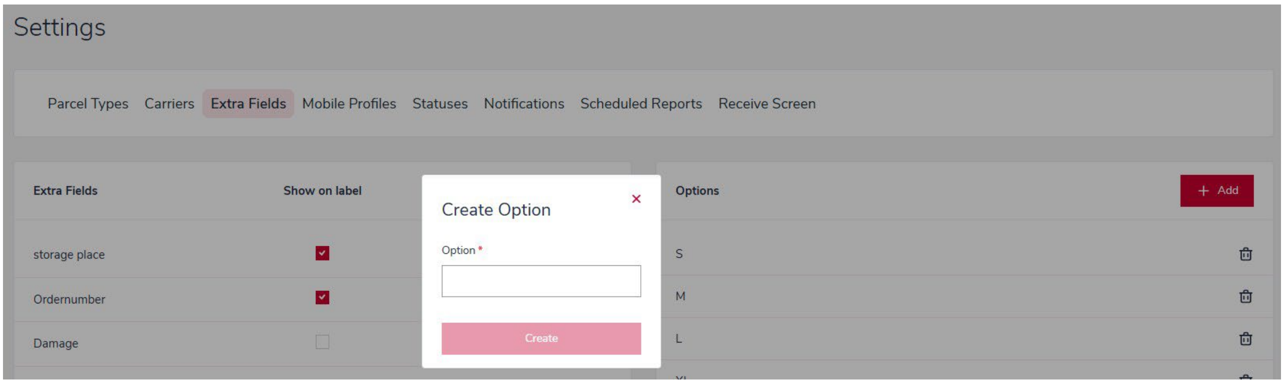


Fig. 97 Dropdown Field: Entering Values

After you have created a drop-down field, select it in the displayed left list and then enter the corresponding values in the "Options" field on the right using the "Add" button.

The contents of the additional fields can also be printed on the parcel label by activating the "Show on label" checkbox.

The extra fields are displayed in the "Capture Parcel" screen and in the export of the parcel data and can be integrated as content in the notifications.

7.6.4 7.6.4 Mobile Profile Pro

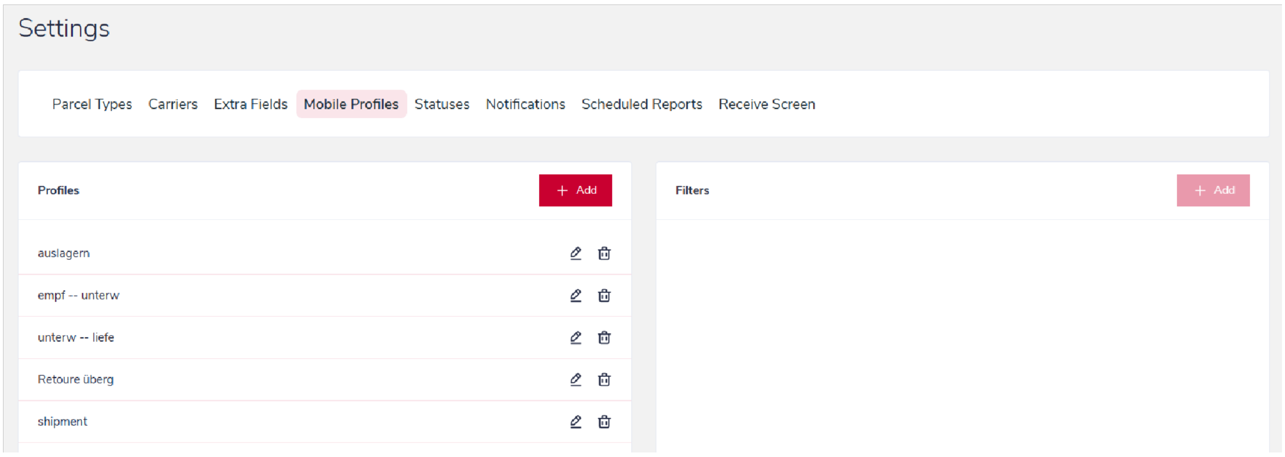


Fig. 98 Mobile Profile

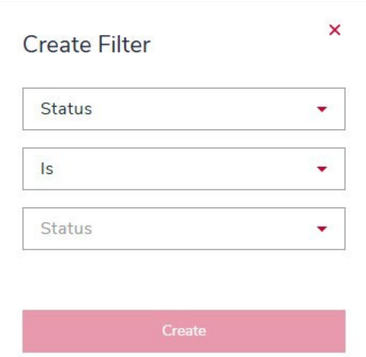
In the Parcel Tracking Pro version, the administrator has the "mobile profiles" section at his disposal. Here he can create profiles with certain conditions, which then appear as a tile on the start screen in the FP Trax app. The tile also shows the number of shipments that match the specified rules. For example, all parcels that are assigned to a certain route with a certain status or certain shipment types with a certain status, such as captured express shipments, can be displayed. This allows you to keep track of your shipments and react faster to priorities

7.6.4.1 7.6.4.1 Creating mobile profiles

Fig. 99 Create a mobile profile

To create a new mobile profile, click on the "Add" button in the "Profiles" column on the left. It will open a window in which you can

- enter the name of the new mobile profile, and
- Select the status from the drop-down field, which will be set <u>after</u> the shipment has been processed in the mobile profile.
- Profile Inputs/Pre-Populated Location
  - Location (pre-selected): A location can be specified in the "pre-filled location" area, which is automatically set when the mobile profile is applied. However, this value can also remain empty.
  - Shipment bundling: this mobile profile can be used to create shipments.
  - Location and Shipment: Shipments can be created with the creation of pre-selected locations
- Filter Button
  - Filters: in the mobile profile, the shipments can be filtered by recipient using the filter icon in the upper right corner
  - Filter and select: in the mobile profile, the shipments can be filtered by recipient using the filter icon in the upper right corner and can be displayed as already marked
- Then click on the "create" button. The new profile is created and listed in the left column "Profiles".



To edit a mobile profile, click on the profile in the **Profiles** list on the left. The selected profile will be highlighted.

In the **Filters** section on the right, click **Add** to define the desired filters. You can add one or more filters by selecting the appropriate criteria from the drop-down menus.

Note: When using multiple filters, the system applies them with **"AND" logic**, not "OR".
This means all conditions must be met at the same time.

For example, create a mobile profile that shows all shipments that have 2 different statuses by not selecting status / is / status name, but in this case exclude all other statuses with status / is not / status name.

Fig. 100 Mobile profile: Create filters

7.6.4.2 Edit mobile profiles

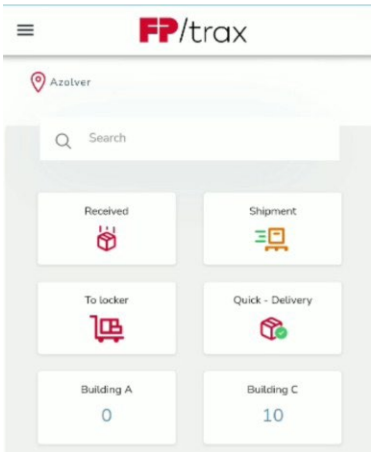
You can edit profiles or filters by clicking the **pencil icon** in the corresponding row.

7.6.4.3 Delete Mobile Profile

You can delete a profile or filter by clicking the **trash can icon** in the corresponding row.

7.6.4.2

7.6.4.4 Use mobile profiles in the mobile app



Once a **mobile profile** has fully created and assigned to the corresponding user, it appears as a **tile** on the home screen of the **FP Trax mobile app**, showing the number of matching parcels.

Tap the tile to display all shipments that match the configured filters.

Note: If the mobile profile is not visible in the FP Trax app, make sure that:

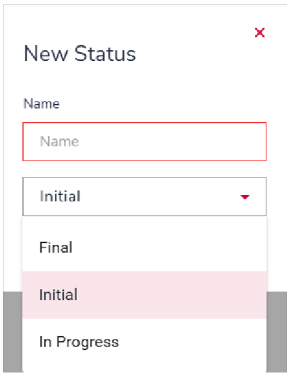
- the mobile profile is assigned to the user, and
- the mobile profile setup is complete.

You can assign the mobile profile in the **FP Trax web portal** under **Administration › Contacts › Edit Contact (pencil icon) › Mobile Profile**. For more details, see section **12.1.1.3 Users**.

Fig. 101 Mobile profile in the mobile app

7.6.5 7.6.5 Status

![FP/trax logo]



Each status must be assigned to one of the following conditions:

7.6.5.1 • Initial • In Progress • Final

Only **one Initial status** can be defined (e.g. *Received or Created*).

You can create multiple **In Progress** and **End** statuses, depending on your workflows and processes.

At least **one Initial** and **one Final** status are required. All other statuses are optional and can be configured as needed.

Fig. 102 Status

Note: The status name is also used as a heading in the app's buttons.

Note 2: If you have changed a status, you must confirm the change in the FP Trax mobile app. To do this, go to > Settings > Status buttons in the main menu and reassign the corresponding states using the drop-down menu.

7.6.6 7.6.6 Notifications

You have the option of combining individual notifications in connection with the shipment type, the status and a special group of notification recipients. One or more reminders can be created for each notification.

7.6.6.1 7.6.6.1 Notification management

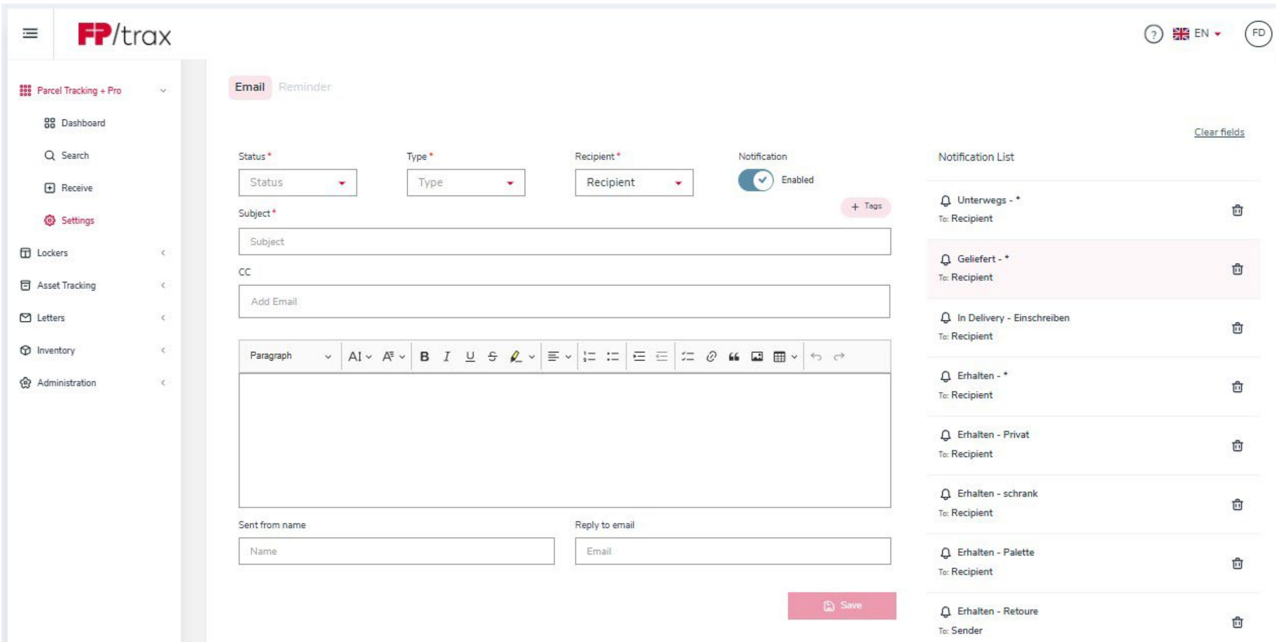


Fig. 103 Create custom notifications

To create a new notification, in the Parcel Tracking > Settings > Notifications section, the first step is to select the status, the shipment type and the group of recipients for which you want to create an email notification. Enter a unique subject and write the content text. You can then format your text. In the cc field, you can enter an e-mail address to which the messages can be delivered in addition to the recipient.

Add tags to your notification

Tags are placeholders that capture specific data (such as recipient or shipment details) when a parcel is registered. These values are then automatically inserted into notifications.

The "Tags" button allows you to open a list of all available tags. By clicking on the tag once, this placeholder will be integrated into your email body or in the subject line. If the information was entered during the Parcel capture, it will be displayed later in the notification.

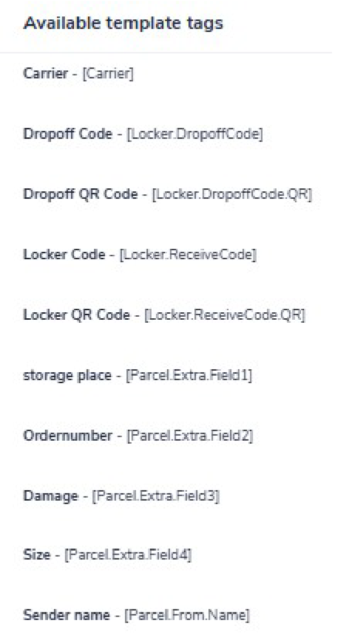


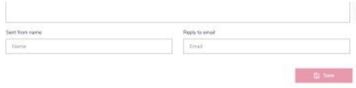
Fig. 104 Selecting keywords for an email

7.6.6.2 Store sender information

When you enter text in the "Sent from" field, the recipient will see it as the sender name of the notification.

If you enter an email address in the **Reply to** Email field, the notification recipient's reply will be sent to the email address you specified. If no information has been provided, all inquiries/responses to this message will be sent directly to FP Trax Support.

Fig. 105 Sent by and reply to

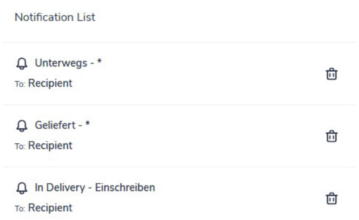


7.6.6.3 Enable Notification

You can use the "Notification Enabled" toggle to enable or disable the sending of notifications.

Disabled notifications are not sent and appear with a crossed-out bell in *Fig. 106 Activation button* the list of notifications.

Fig. 107 List of Email Notifications



Save/edit/delete notification

As soon as you have created the new notification via the "Save" button, it will appear in the notification list on the right.

Notifications can be removed via the trash can icon.

You can adjust existing notifications by selecting them from the list on the right, making the changes in the form and then confirming them with the "Save" button.

7.6.6.4.1 7.6.6.2 Management of reminders

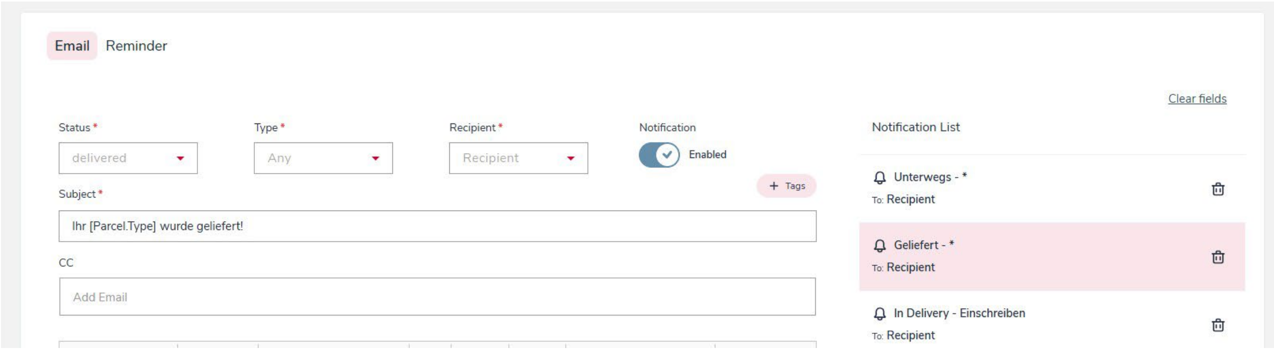


Fig. 108 Parcel tracking > Settings > Notification > Email

One or more reminders can be created for each email notification.

To create a reminder email, first select a notification from the list on the right by clicking on it, e.g. "Received - All".

After that, the "Reminder" button in the upper left corner becomes active and can be selected, whereupon the input field for the reminder e-mail of the notification opens.

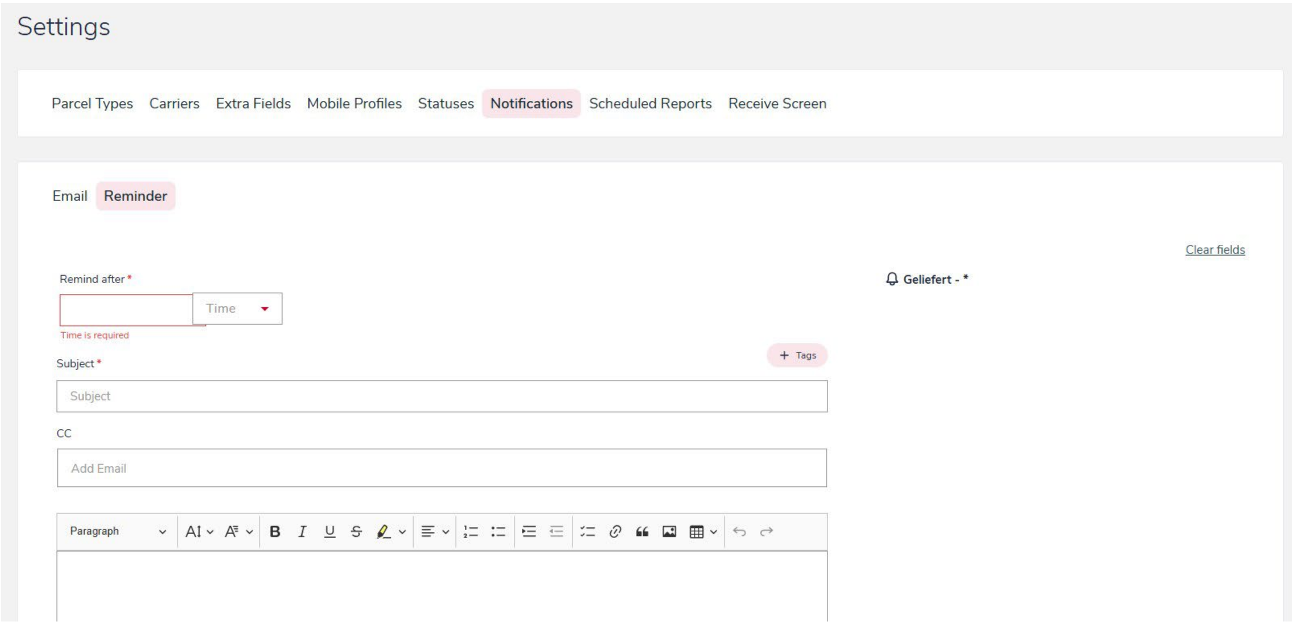


Fig. 109 Create a reminder

In the "Remind after" section, enter the number of hours or days in the "Remind after" field and select the desired time unit from the drop-down menu.

Enter a unique subject, write the content text with or without keywords, and save the reminder. In the cc field, you can enter an e-mail address to which the messages can be delivered in addition to the recipient. Cf. *7.6.6.1 Notification management*.

You can create as many reminders as you want. These are listed like the notifications on the right and can also be edited there if necessary or deleted via the trash can icon.

7.6.7 7.6.7 Scheduled Reports

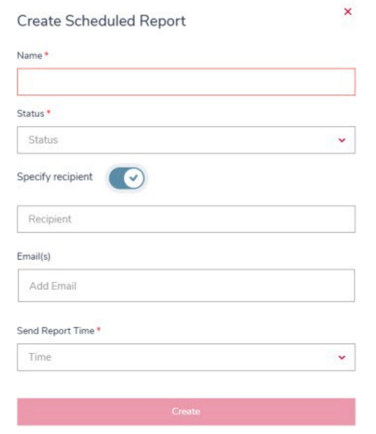


Fig. 110 Creating scheduled reports

Create a scheduled report:

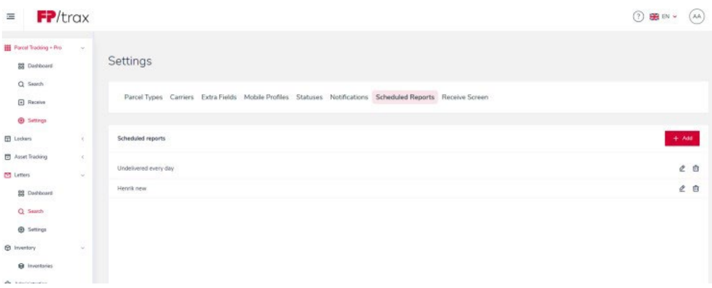
Scheduled reports allow you to automatically generate reports based on selected **parcel statuses** and have them sent by email to one or more recipients.

You can either select a specific **recipient** by enabling the toggle and choosing a name from the list or enter one or more **email addresses** manually.

You can define the **time** at which the reports are sent.

The reports are delivered as **plain text emails**.

You can add as many reports as you like.



Edit or Delete scheduled reports:

Use the **pencil icon** to edit reports and the **trash can icon** to delete them.

Fig. 111 Edit/delete scheduled reports

7.6.8 7.6.8 Receive screen

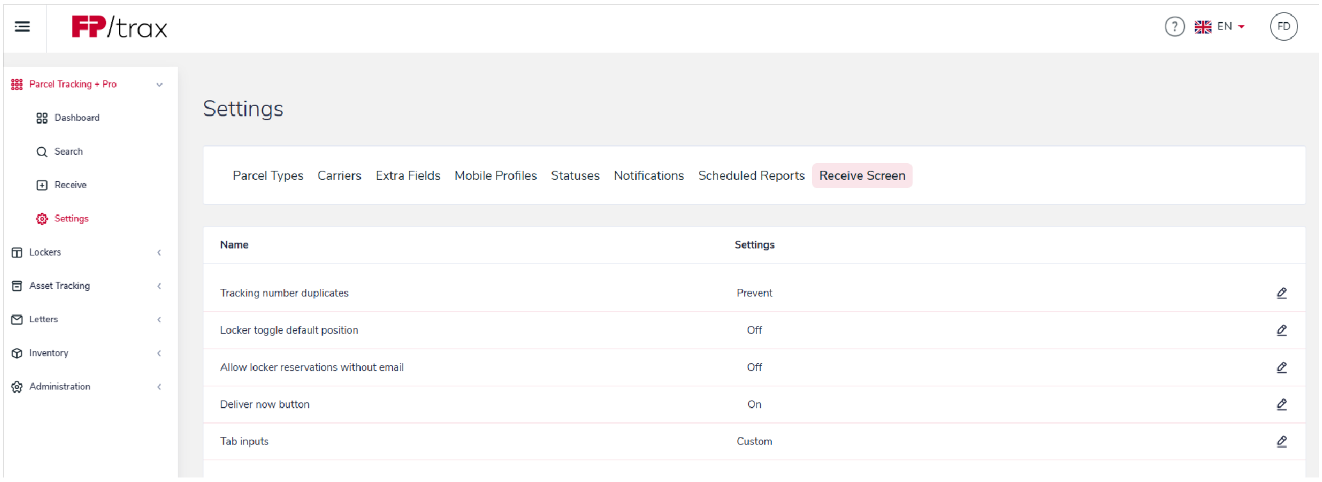


Fig. 112 Receive screen options

In **Settings › Receive Screen**, you can configure the following options for parcel registration:

- **Tracking number duplicates**
  Decide whether duplicate tracking numbers are allowed when registering parcels.
- **Locker selection default position**
  When using parcel lockers, you can enable or disable automatic locker selection.
- **Locker reservation without email address**
  Choose whether parcels can be reserved in the locker to recipients who do not have an email address stored.
- **"Deliver now" button**
  Enable a button that allows you to mark a parcel as **delivered immediately** during registration.
- **Tab inputs (order)**
  Define the order in which input fields are selected when using the **Tab key** during parcel registration.

7.6.8.1

7.6.8.1 Tracking number Allow or disallow duplicates

Fig. 113 Tracking number duplicates

To change this setting, click the **pencil icon** in the corresponding row.

In the window that opens, you can choose from the following options:

- **Prevent** *(default)*
  Duplicate tracking numbers are not allowed. If the same tracking number is scanned again, an error message will appear.

7.6.8.2

- **Allow**
  Duplicate tracking numbers are permitted. This is useful if carriers reuse the same tracking numbers.
- **Allow and prefill**
  Duplicate tracking numbers are allowed, and existing shipment details (e.g. the recipient) are automatically filled in during parcel registration.
  This is helpful if recurring shipments use the same tracking number for the same recipient.

Click **Update** to save your changes, or **X** to cancel.

7.6.8.3 Default Locker Toggle Position

Fig. 114 Locker Switching

This setting is only relevant if you are using a **parcel locker system**.

To change the setting, click the **pencil icon** in the corresponding row. In the dialog that opens, you can select one of the following options:

7.6.8.4

- **Off**
  The option to reserve a parcel locker is **disabled by default** in the Parcel Receive screen.

7.6.8.5

- **On**

  The option to reserve a parcel locker is **enabled automatically** when a delivery to a parcel locker is selected. Click **Update** to save your changes, or **X** to cancel.

7.6.8.6 Allow locker reservations without email

7.6.8.6.1 7.6.8.2 Deliver Now Button

Providing an **email address** is recommended when registering parcels, as it enables the system to notify the recipient when a parcel is placed in a locker.

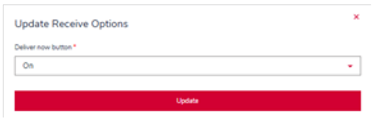


Fig. 113 Locker reservation without e-mail address

If the option **Allow locker reservation without email** is enabled, parcels can still be delivered to recipients who do not have a valid email address stored in FP Trax.
However, in this case, **no notification will be sent** to the recipient.

To change this setting, click the **pencil icon** in the corresponding row.

In the dialog that opens, you can choose one of the following options:

Fig. 116 Deliver now button

7.6.8.7

- **Off**

  The **Deliver Now** button is not displayed in the Receive screen.

- **On**

  The **Deliver Now** button is displayed in the Receive screen. When this option is used, the shipment will be **created and immediately assigned the final status** after entering the parcel data.

To save your changes, click **Update**.
To cancel, close the window by clicking the **X** in the upper-right corner.

7.6.8.7.1 7.6.8.3 Tab order in the receive screen

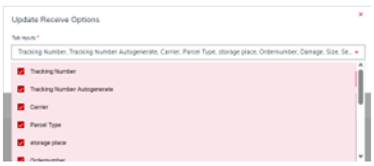


Fig. 117 Set Tab Order

To enable **faster and more convenient parcel registration**, many users prefer using the **Tab key** on the keyboard instead of the mouse when entering data.

In the **Tab order settings**, you can define which input fields the Tab key should move to and which fields should be skipped. This allows you to

control the navigation order and exclude fields that are not relevant for data entry.

To save the change, click on the "update" button. If you want to discard the change, close the window by clicking on the **X** in the upper right corner.

8 8 Lockers

8.1 8.1 General information about the lockers

Fig. 114 Example of an outdoor parcel box system

FP Trax is compatible with a wide range of **modular and customizable locker systems** from leading manufacturers.

We provide locker solutions tailored to your specific needs and complement them with the appropriate **software for efficient parcel management**.

Feel free to contact us: support@traxsuite.com

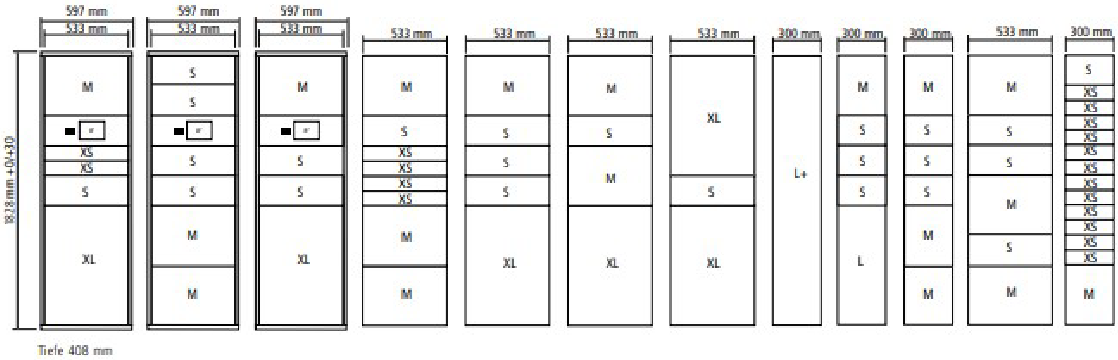


Fig. 115, fig. 116 , fig. 117 Examples of indoor and modular parcel box systems

8.2 8.2 The Dashboard

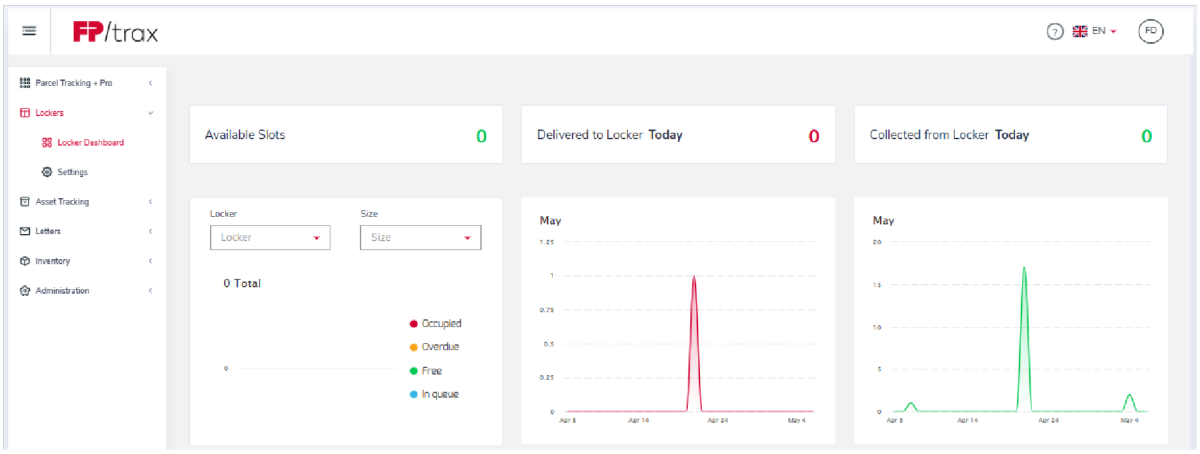


Fig. 118 Lockers > Dashboard

If a locker system is available at your location and you have the required authorization (see section **12.2.2 Roles and Permissions**), the **Lockers** section displays the dashboard. The dashboard provides an overview of the system's **capacity** and shows how many consignments are **delivered to** and **collected from** the locker system each day.

If multiple locker systems are available, you can select a specific system using the **drop-down menu**. You can also use the **Size** drop-down menu to filter by compartment size and view current availability.

By clicking on a specific **status**, you are taken to a list of all consignments with that status.

8.3 8.3 Shipment Processing RENZ

8.3.1 8.3.1 Register parcels to the locker

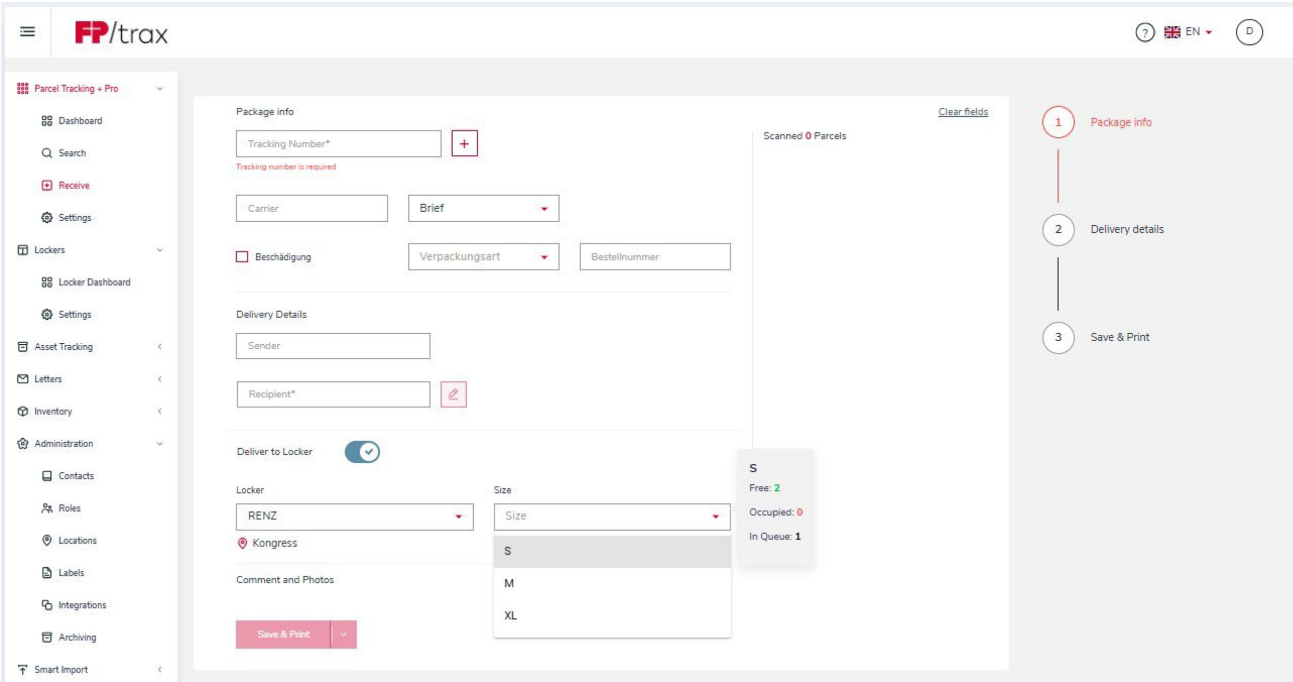


Fig. 119 Record consignment for the locker system

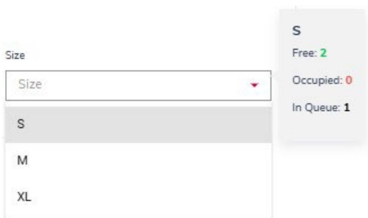
When delivering to a parcel locker, enable the **Deliver to locker** toggle.

If multiple locker systems are available, select the desired system from the **drop-down menu**. Then choose the appropriate **compartment size** for the shipment.

Click **Save & Print** to complete the process. The shipment will be registered, a suitable locker compartment will be automatically reserved, and a **label will be printed**.

Once a compartment size is no longer available, it will be grayed out in the drop-down menu and can no longer be selected.

Fig. 120 Occupied compartment size



To find out the current utilization of the locker sizes of the locker system, move the mouse pointer over the respective locker size. A window will appear in which you can see how many compartments of the corresponding compartment size are free, occupied or reserved.

Fig. 121 Specialist workload

8.3.2 8.3.2 Loading consignments into a tray (RENZ)

8.3.2.1 8.3.2.1 Registration at the locker system

To get to the employee login area, click on the logo in the bottom center, the display changes to the logistician login.

Fig. 122 Start display locker system

Please click on the "Login with PIN" button or alternatively hold your badge up to the NFC reader if your locker system supports this login method and the data of your badge is stored in your account.

If you log in without a badge, enter the PIN using the keyboard and confirm the entry via the "Login" button.

The display switches to the delivery menu.

Fig. 123 Logistician registration locker system

8.3.2.2 8.3.2.2 Insert the consignment into the locker system

Select the "Delivery via transaction number" button.

Fig. 124 Delivery of locker system

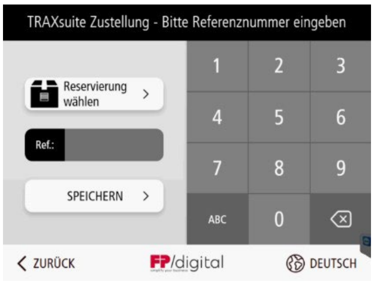


Fig. 125 Scan parcel

Scan the FP Trax label on the shipment or from the FP Trax app or, if no FP Trax label is available, scan the shipment number on the parcel via the scan module on the Locker or alternatively select the reservation via the "Select reservation" button.

Note: Search for the show in the FP Trax app and swipe from right to left across the show. Then click on the QR code icon to enlarge it and read it from your mobile phone.

Fig. 126 Insert parcel info page

The display then switches to the information display "Insert parcel and close door".

Place the shipment in the open compartment and then close it.

Note: If the compartment is too small, DO NOT close the door and select a different compartment size via the menu item "Change compartment size".

Fig. 127 Message parcel delivered

The message "Parcel successfully delivered" appears.

The recipient will be informed of the delivery by e-mail. See section *7.6.6 Notifications* .

You can return to the delivery menu via the "Go to main menu" button or log out of the system using the "unsubscribe" button.

8.3.3 8.3.3 Removing Overdue Shipments from a locker (RENZ)

Consignments exceeding the configured **pickup period** may be removed from the locker system for manual handover.
This function must also be used to retrieve consignments when technical issues prevent the recipient from completing the pickup.

8.3.3.1 8.3.3.1 Registration at the locker system

Fig. 128 Start display service login locker system

To access the Service Login area, click twice on the logo in the bottom center. The display switches to the service login.

You will then have the option of logging in with your badge or service PIN.

Fig. 129 Service Home Screen

Select the menu item "Open compartment“.

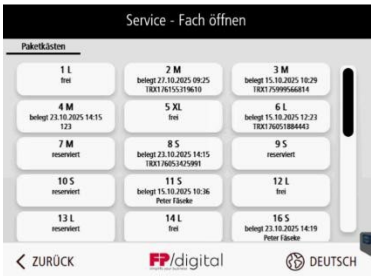


Fig. 130 Overview of compartments and longitudinal consignments

Select the relevant compartment with the longitudinal consignment. The compartment opens automatically.

Note: The waiting period is displayed on the button of the corresponding compartment.

Remove the shipment and then close the door. Or click on "Cancel" if you do not want to remove the shipment after all.

Confirm the withdrawal with "Yes" if you have removed the shipment.

Confirm with "No" if you have not removed a shipment.

The display switches to the main menu, after which you can withdraw further programs or end the process if necessary.

8.3.3.2 8.3.3.2 Handing over the shipment to the recipient

Hand over the consignment to the recipient via alternative delivery after it has been removed from the locker system. Read more about this section *7.5 Parcel delivery.*

8.4 8.4 Shipment Processing (Cleveron & Flexity)

8.4.1 8.4.1 Register parcels to the locker

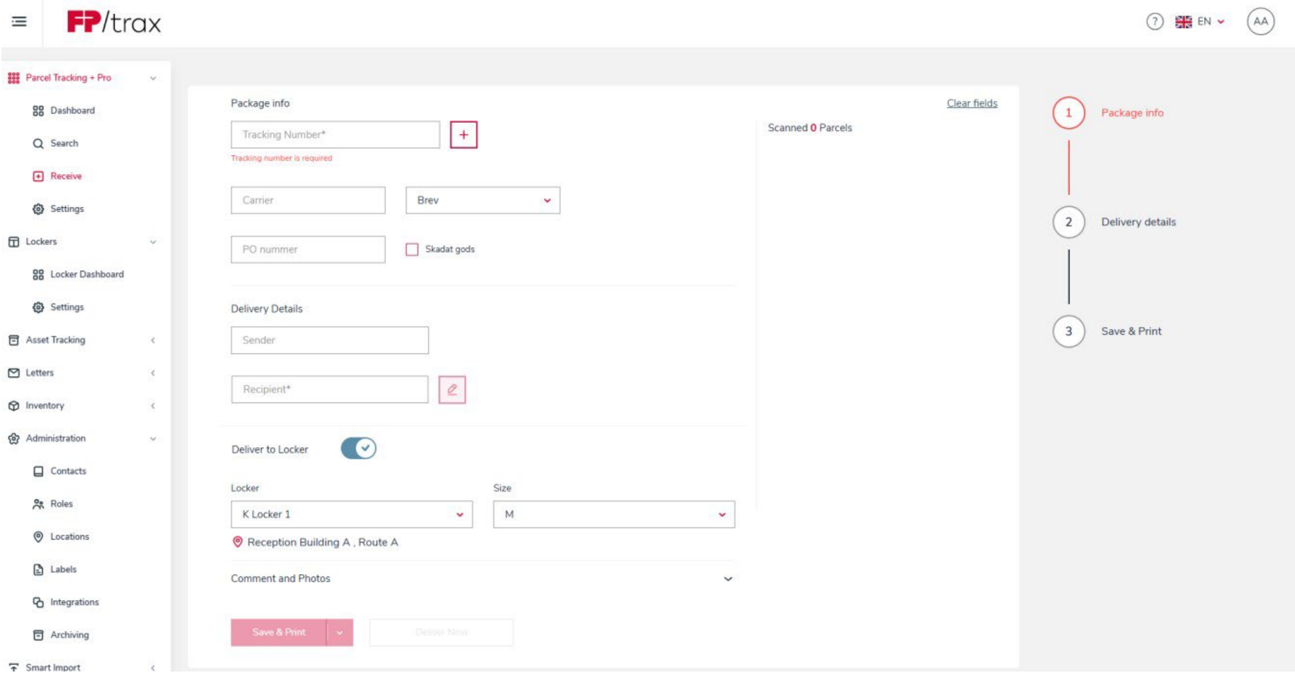
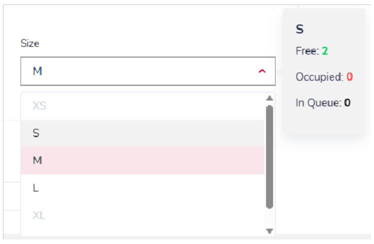


Fig. 131 Create a parcel for the locker system

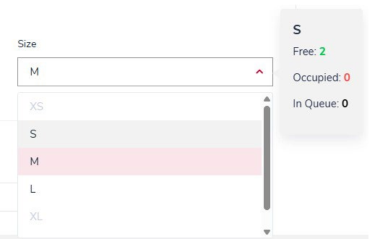
The difference with entering a shipment without delivery to a locker is that you now activate the "Deliver to locker" toggle. If there are several locker systems available, you can select the desired system from the dropdown menu. In addition, select the compartment size required for the shipment from the "Size" drop-down menu.

By clicking on the "Save & Print" button, the consignment is recorded, a locker of the appropriate size is reserved and a label is printed.



Once a compartment size is no longer available, it will be grayed out in the drop-down menu and can no longer be selected.

Fig. 132 Occupied compartment size



To find out the current utilization of the locker sizes of the locker system, move the mouse pointer over the respective locker size. A window will appear in which you can see how many compartments of the corresponding compartment size are free, occupied or reserved.

Fig. 133 Slot availability

8.4.2 8.4.2 Loading parcels into a locker (Cleveron)

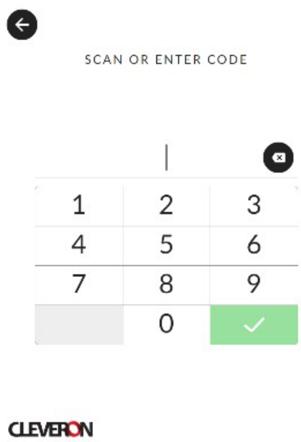
Fig. 134 Welcome screen

Delivery of parcel to a locker flow begins with Welcome Screen. After choosing the language (if only one language is activated, click anywhere) on the Welcome Screen you'll be asked to login and then start scanning the barcodes of the parcels.

When the parcel is placed into the slot and door closes, FP Trax will notify the recipient about the parcel to collect with the qr code and pickup code. The parcel will change the status as well – to in the locker status.

Fig. 135 Scan barcode

Fig. 136 Enter code



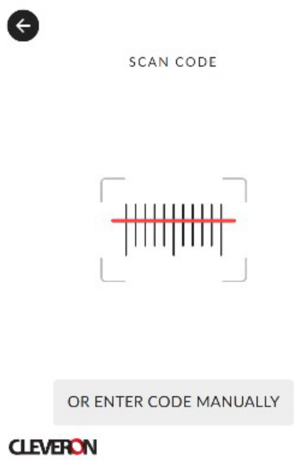


Fig. 137 Insert parcel to the locker

8.5 8.5 Shipment Processing Flexity

8.5.1 8.5.1 Register parcels to the locker

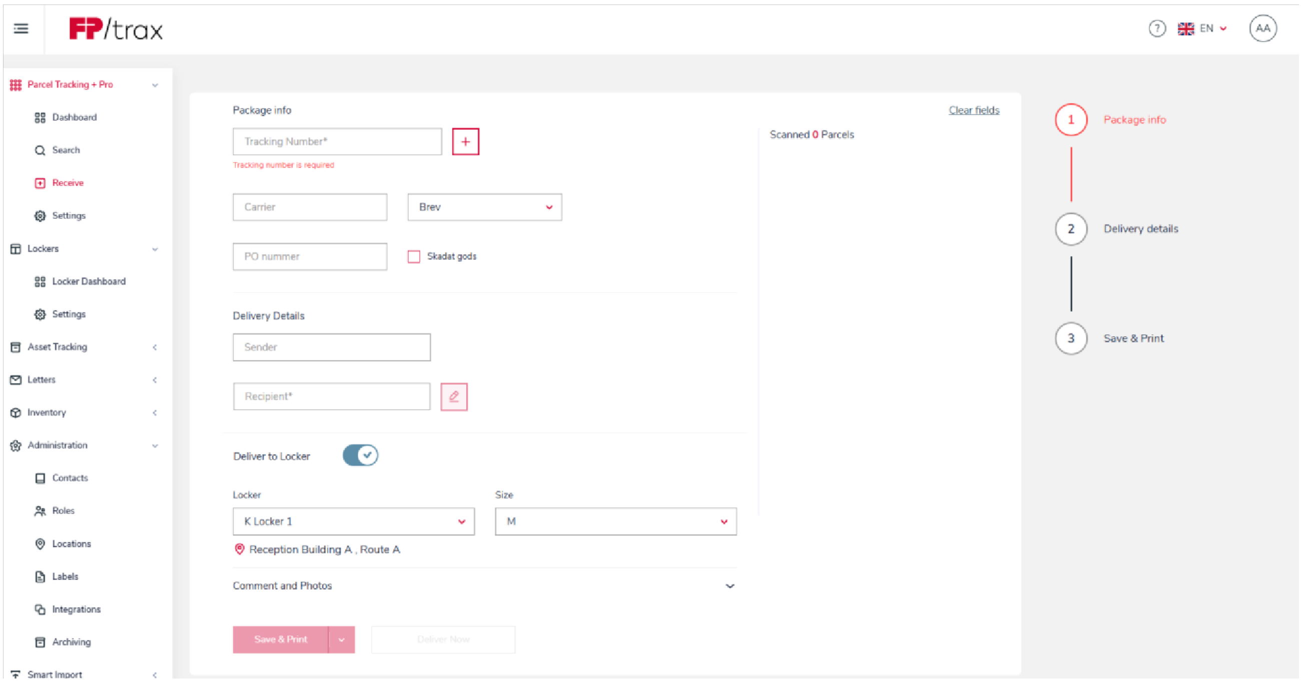
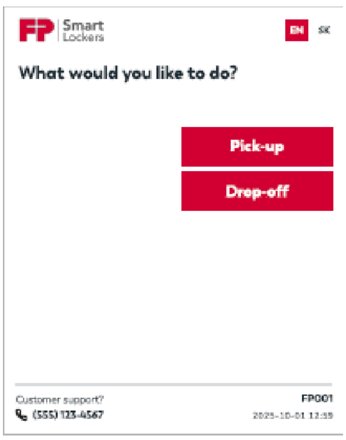


Fig. 138 Register parcel to the locker webapp

Create the parcels and chose the locker and size (any size or specific size).

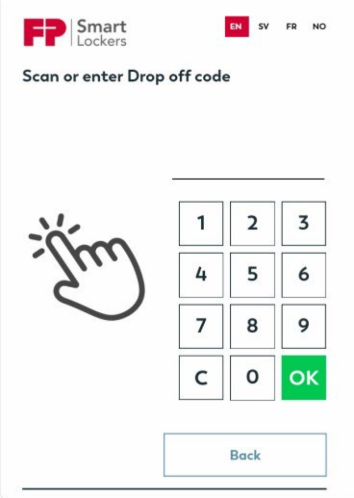
8.5.2 8.5.2 Loading parcels into a locker (Flexity)

8.5.2.1 8.5.2.1 Delivery to locker workflow



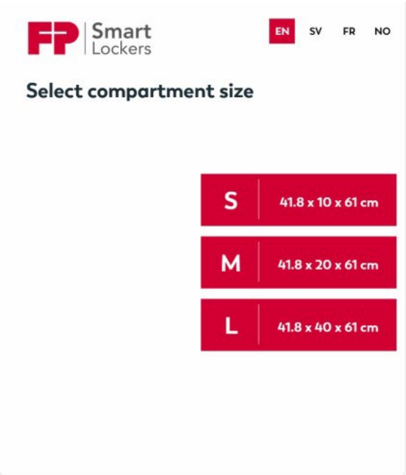
Click **Drop-off** Button

Fig. 139 Flexity welcome page



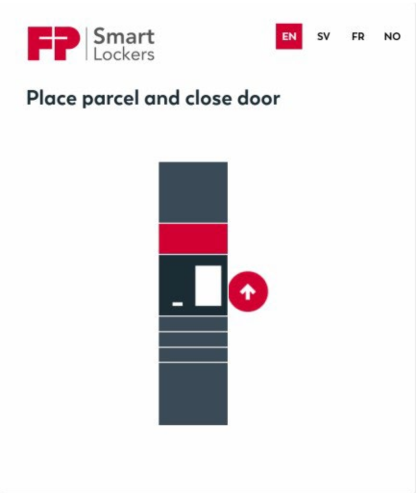
To place a parcel in the locker, simply scan its barcode from FP Trax or enter the drop-off code shown in the parcel details.

Fig. 140 Scan the parcel barcode or enter drop off code



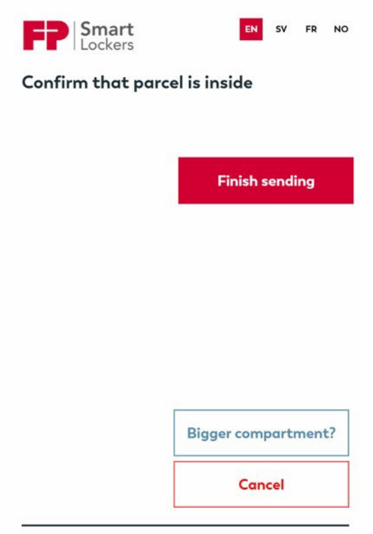
If you chose **"Any"** when registering the parcel in FP Trax, you can select the size at the locker and view the available compartment dimensions there.

Fig. 141 Choose the compartment size



The locker opens the slot to place your parcel

Fig. 142 Place parcel and close the door



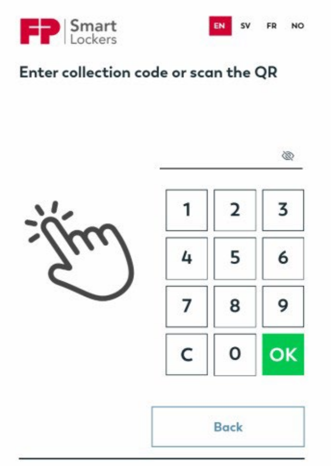
If you are happy with it, click on **finish sending** button. If your parcel didn't fit, click on **Bigger compartment?** Button.

Fig. 143 Finish or choose bigger compartment

In this screen the available sizes will be shown – select a size to place your parcel in.

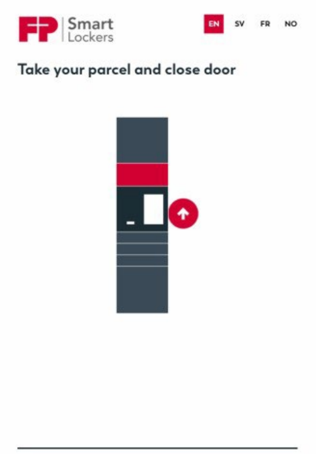
Fig. 144 Select the size

8.5.2.2 8.5.2.2 Pickup workflow



To receive your parcel (pick up from the locker), use the QR code or the PIN code that you got in the notification from FP Trax.

Fig. 145 Enter pickup code or scan the QR code



The door opens and you can take your parcel. The pickup is competed.

Fig. 146 The door has open

8.5.2.3 8.5.2.3 Courier workflow

Login

With Flexity, carriers (couriers) can place parcels directly in the locker without registering them in FP Trax first. To use this feature, a courier user must first be set up in the Flexity portal so they can log in to the locker.

To access the **login** prompt, tap the top-left corner near the logo to open the login screen.

Then enter your **User ID** and **PIN**.

Fig. 147 Tab to get a login prompt

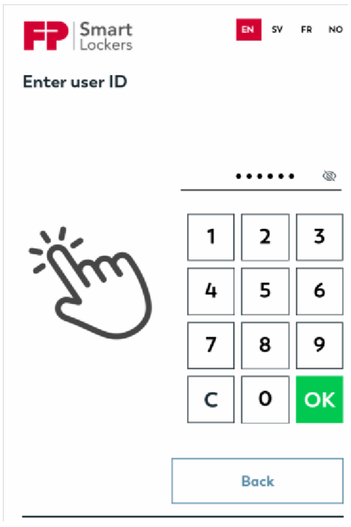


Fig. 148 Enter User ID

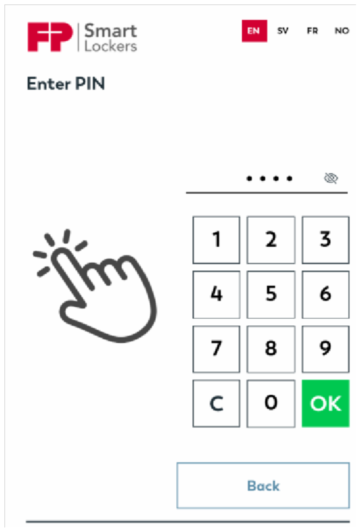
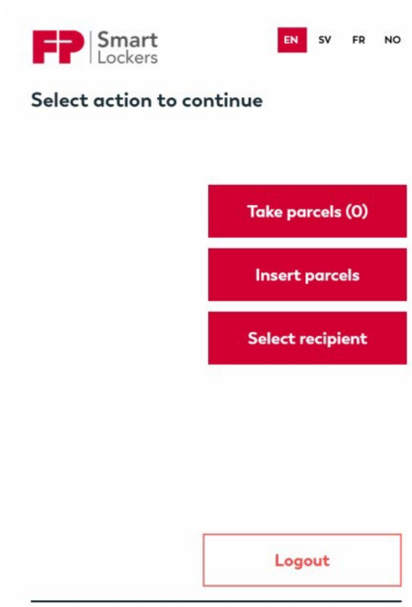


Fig. 149 Enter PIN

8.5.2.4 Select the action



Once the courier has logged in, there are 3 alternatives to choose:

1. Take parcels – parcels that supposed to be picked up by couriers
2. Insert parcels – requires registered tracking number in FP Trax
3. Select the recipient – choose a recipient from the list (the list has been synced with FP Trax recipient list)

Fig. 150 Courier screen

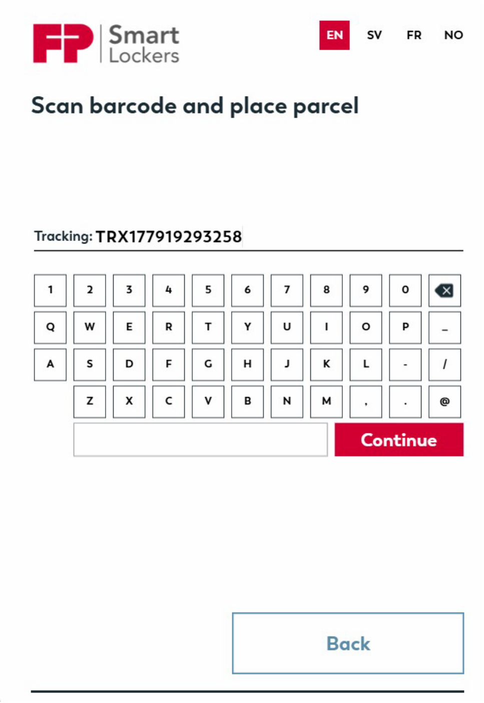


Fig. 151 Courier: Insert parcels

Insert parcels button:

Type the tracking number or scan the barcode of the parcel

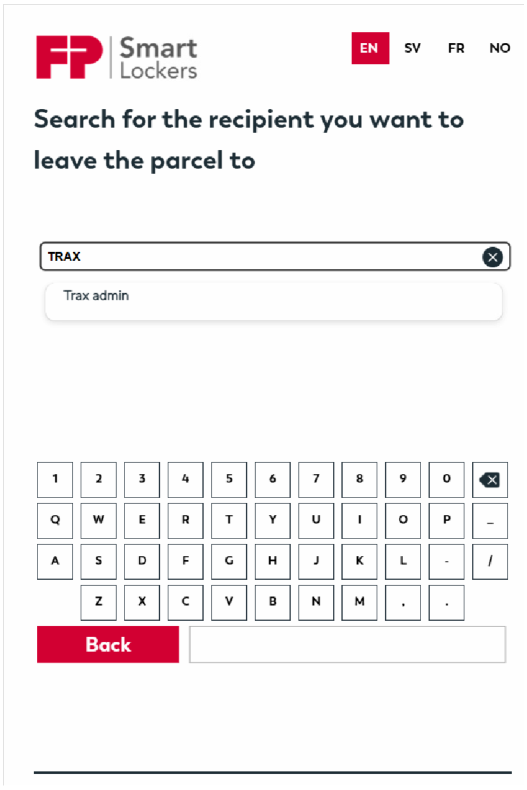
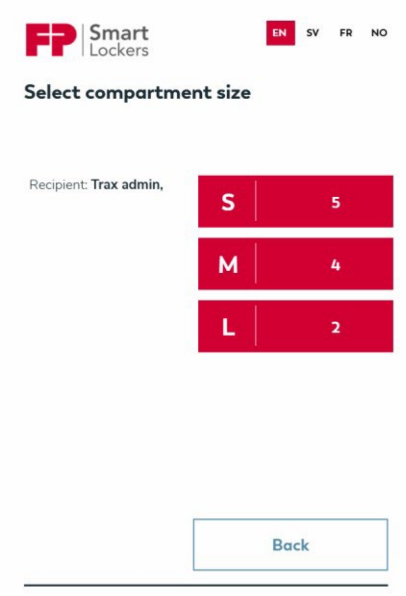


Fig. 152 Courier: Insert parcels

Select the recipient button:

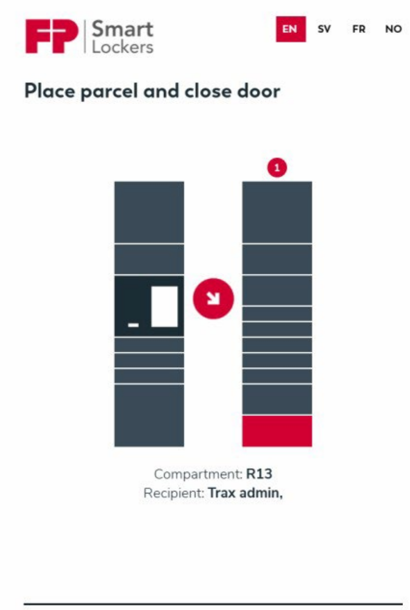
Type the name and choose the recipient from the list.

Parcel will be created in FP Trax with FLX suffix.



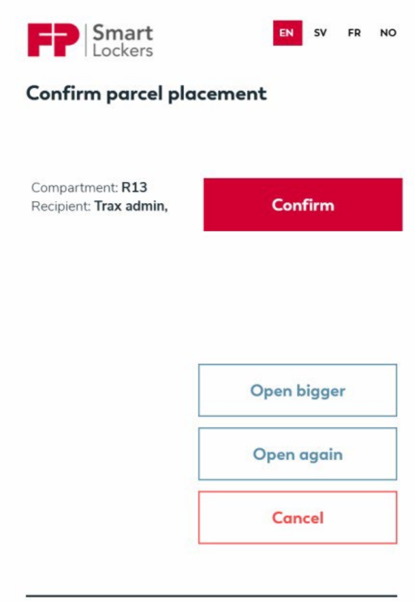
Select the size of the compartment and see the availability of each

Fig. 153 Courrier: select slot size



After the courier has chosen a slot size, the door will open.

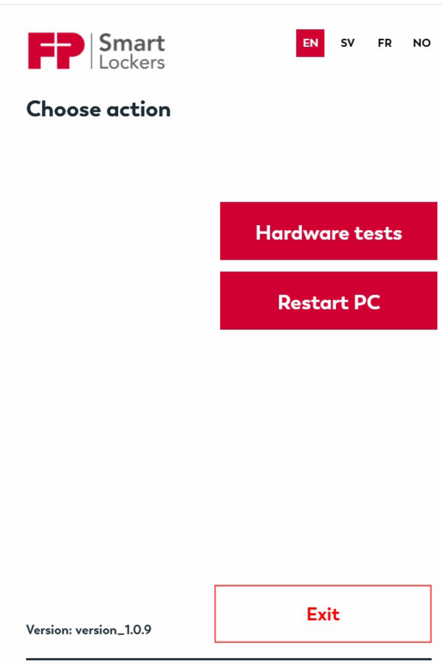
Fig. 154 Courrier: place the parcel



Once the door is closed, a confirmation screen will ask you to either confirm the parcel placement, open a larger compartment, or reopen the compartment if you need to make changes.

Fig. 155 Courrier: confirm parcel

8.5.2.4.1 8.5.2.4 Technician workflow



1) Tap the top-left corner next to the logo to log in as a **technician** using credentials set up in the Flexity Portal.
2) You will have 2 alternatives: Hardware tests and Restart PC.

Fig. 156 Technician: choose action screen

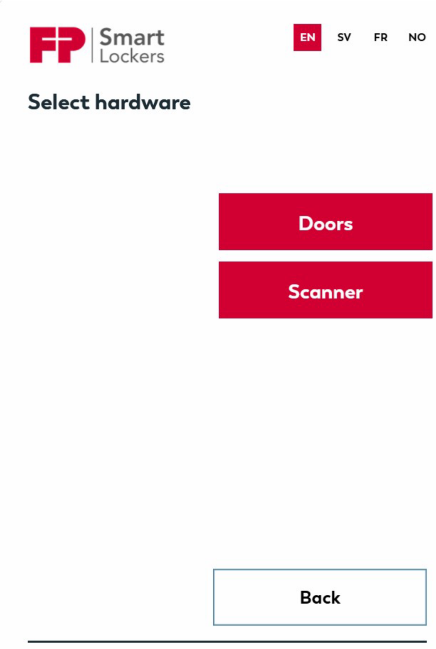


Fig. 157 Hardware test screen

When you select **Hardware Test**, you can run tests on the doors or the scanner.

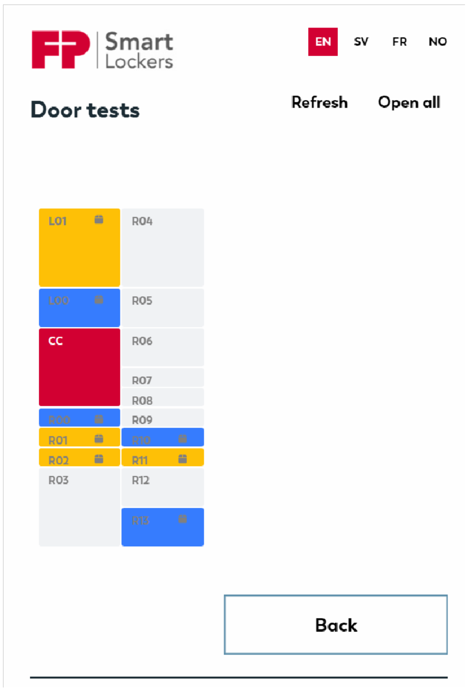


Fig. 158 Door test screen

Select the **Doors** option to view an overview of all compartments. Tap on a compartment to open it.

The following actions are also available:

- **Refresh** – updates the overview
- **Open All** – opens all compartments

Color indicators:

- **Yellow** – overdue
- **Red** – computer compartment
- **Blue** – occupied
- **Grey** – available

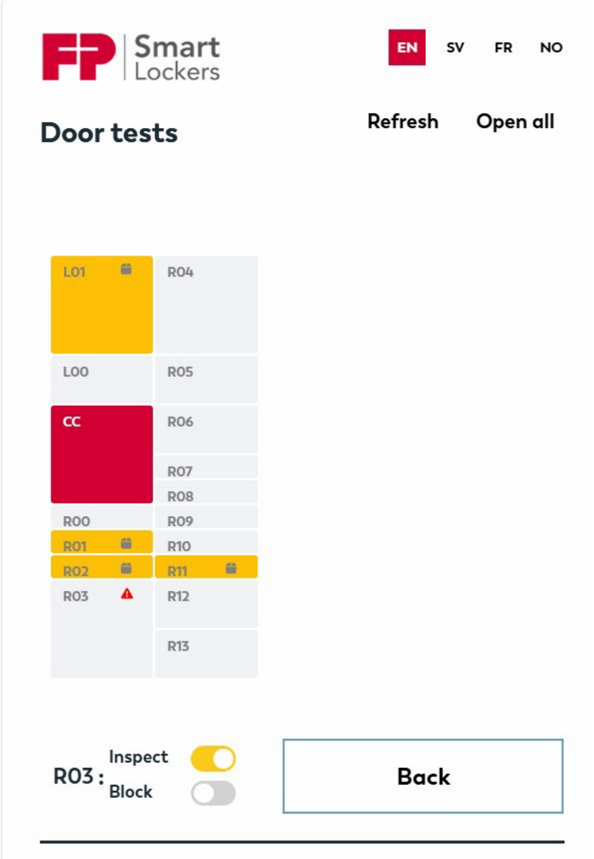


Fig. 159 Door inspection

A warning triangle icon means that the compartment needs to be inspected.

Tap the compartment to open the door and carry out the inspection.

When finished, turn off the toggle to remove the warning.

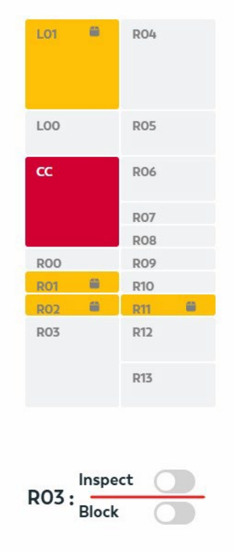
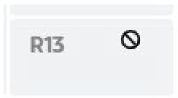


Fig. 160 Disable inspection toggle

To deactivate the door, switch on the **Block** toggle.



The door will display a stop sign and parcels can no longer be allocated to that compartment.

To enable the door again, simply switch off the toggle.

Fig. 161 Door is blocked

8.6 8.6 Lockers > Settings

8.6.1 8.6.1 Locker Status

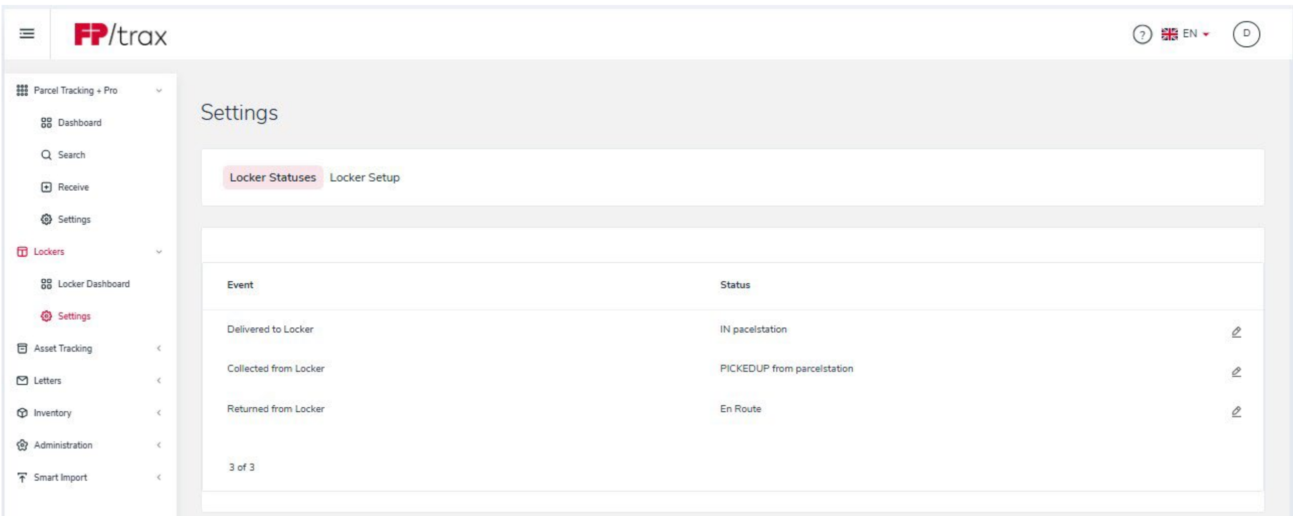


Fig. 162 Locker > Settings > Locker Status

There are **three predefined statuses** for processing consignments in a locker system:

1. **Delivered to locker**
This status is set when a parcel has been placed in a locker.

2. **Collected from locker**
This status is set as soon as the recipient removes the consignment from the locker.

8.6.1.1 3. **Return from locker**

This status is set when a consignment is removed from the locker by an employee for further processing, for example in the case of an overlap or exception.

You can adjust the status assigned to each event by clicking the **pencil icon** in the corresponding row.

It is recommended to create a **parcel notification** for each status (see section **7.6.6 Notifications**).

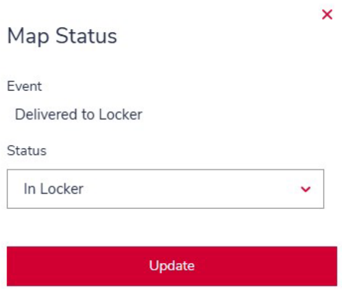


Fig. 163 Status selection "delivered to locker"

8.6.1.2 Delivered to locker

Select an "In Progress" Parcel status that you have created from the dropdown menu. Cf. *7.6.5*

Status

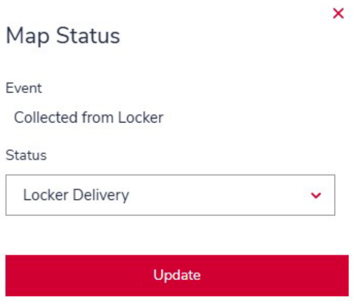


Fig. 164 Status selection "picked up from locker"

8.6.1.3 Collected from the locker

The final Parcel status you have created is available for you to select in the drop-down menu. Set this as the status. Cf. *7.6.5*

Status

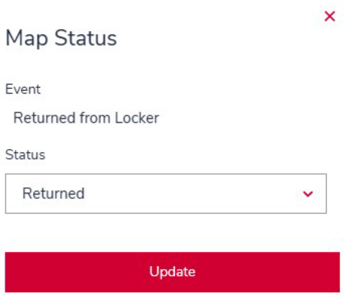


Fig. 165 Status selection "back from locker"

8.6.1.4 Returned from the locker

Select an "In Progress" Parcel status that you have created from the dropdown menu. Cf. *7.6.5*

Status

8.6.2 8.6.2 Locker setup

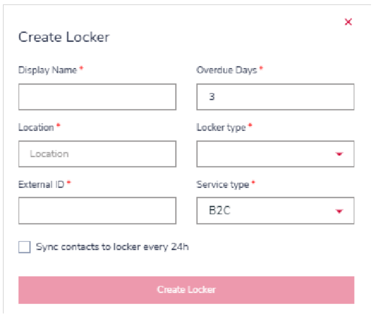


Fig. 166 Setting up a locker system

First, enter a **name** for your locker system.

Next, define the number of days after which shipments in the locker system are considered **overdue for collection**.

Finally, assign a **location** by entering the first few characters of the location name and selecting it from the suggested list. See Cf. *12.3 Locations*

Select the **locker type** from the drop-down menu.

Enter the External-ID of the locker system. You can find out these from your FP Trax team.

Select the **service type: B2C/C2C** (only applicable for Cleveron locker systems).

If you would like to automatically synchronize your **recipient contacts** with the locker system every 24 hours, enable the corresponding **checkbox**.

After entering all required information, click **Create Locker** to complete the setup.

9 9 Asset Tracking

9.1 9.1 General information about Asset Tracking

Track and manage shared assets with ease. FP Trax enables you to assign items to users or locations, ensuring full visibility of shared resources such as tools, meeting room equipment, hospital beds, or bee colonies.

9.2 9.2 The Dashboard

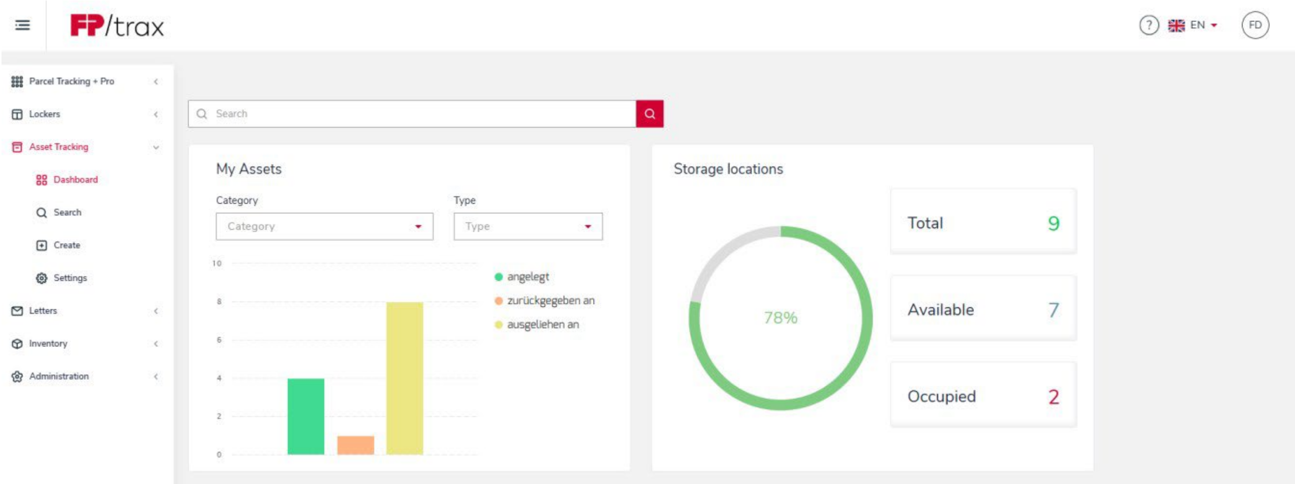


Fig. 167 Asset Tracking > Dashboard

With the required permissions, users and administrators can view all assets in the **Asset Tracking dashboard**. Use the search field to find specific items by entering a name and clicking the magnifying glass or pressing **Enter**.

9.3 9.3 Search

9.3.1 9.3.1 Asset search (web app)

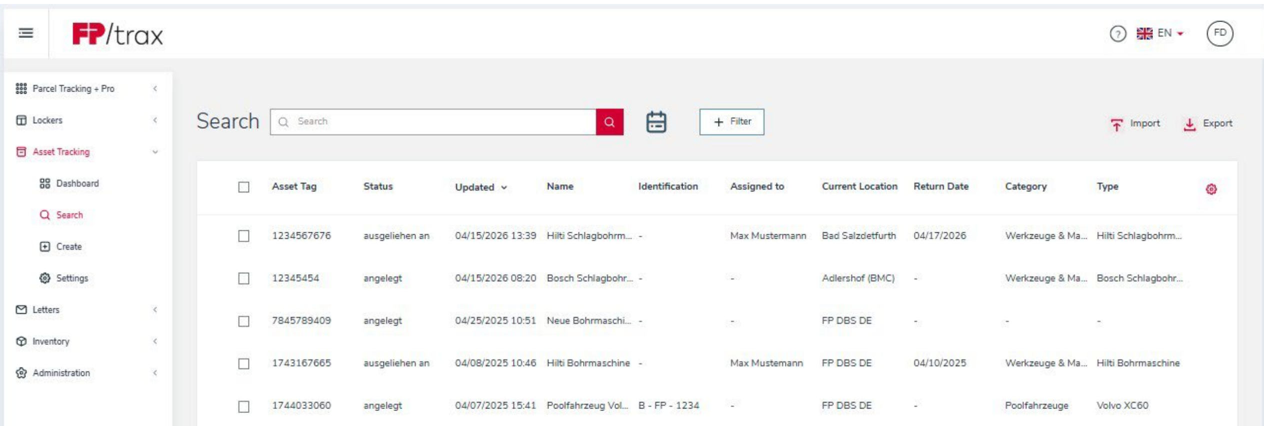
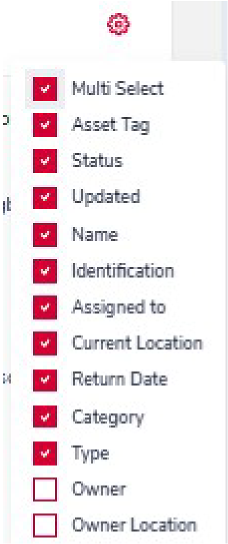


Fig. 168 Assets > Search

The menu item "Search" takes you to the Asset overview. This list lists all non-archived transactions for your Assets (see *12.6* Archiving). You can use the search function to **find and filter assets by any available parameter.**

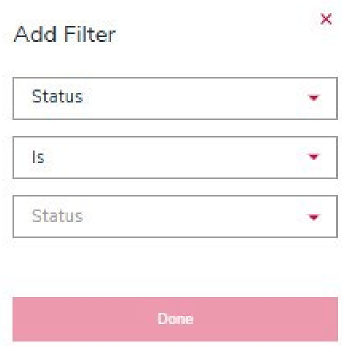
9.3.1.1 9.3.1.1 Asset overview > Adjustment of columns



You can customize the columns shown in the Asset Overview by clicking the **gear icon** in the header row. Use the checkboxes to show or hide individual parameters

Fig. 169 Selection criteria for Asset overview

9.3.1.2 9.3.1.2 Filter Asset list



The **Filter** button allows you to create different filters to refine the displayed results.

Fig. 170 Filter selection

9.3.2 9.3.2 Asset Transaction Details (Web app)

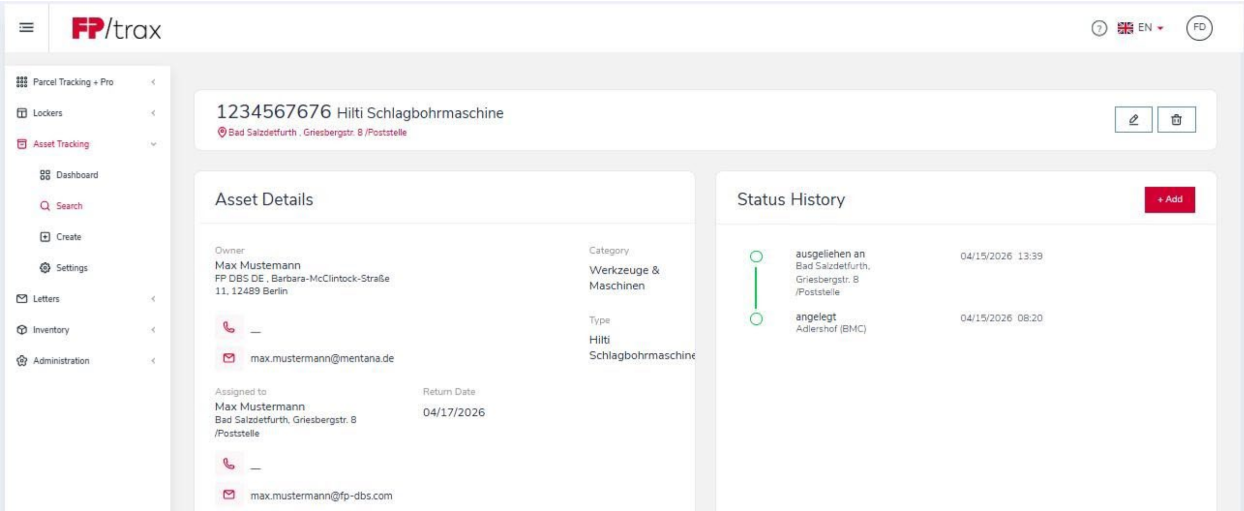
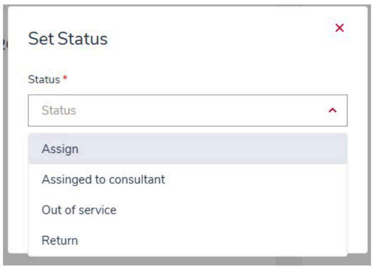


Fig. 171 Detailed view of the shipment

Selecting an asset transaction opens its detailed view. This view displays key information such as the asset name, lender, category, type, description, and current owner or location. The status history is shown chronologically on the right.

9.3.2.1 9.3.2.1 Changing Item Status

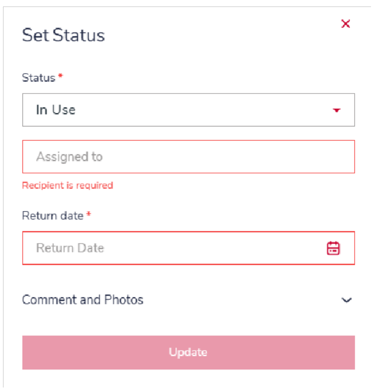


To change the status of an item, click the "Add" button in the item details. Select the appropriate status from the drop-down menu.

Note: Status names may vary depending on your configuration (see section 9.5.2, *Status*). The examples shown below may differ from the names used in your system.

Fig. 172 Status selection

9.3.2.2 9.3.2.2 Change Asset status > In use



Once the **In Use** status is selected, specify the borrower in Assigned to field and enter the return date. Both fields are required. You may also add a comment and photos if needed. To apply the changes, click **Update**.

Fig. 173 Status > in use

9.3.2.3 9.3.2.3 Change Asset status > Final status

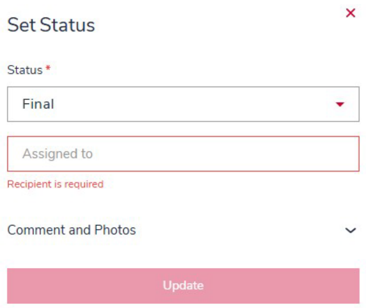


Fig. 174 Status > final

After you have selected the final status, enter the person who disposed the item. You can also add current pictures or a comment. Then click on the "update" button to save the new status.

9.3.2.4 9.3.2.4 Changing Item Status > In store

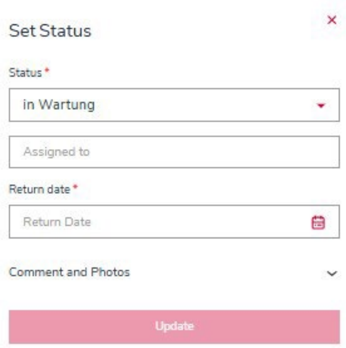


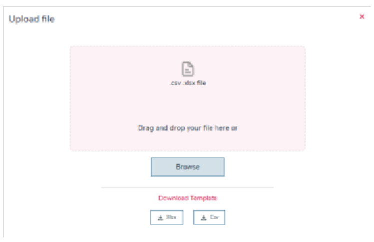
Fig. 175 Status > In store

After selecting the status "in store", then enter the person who returned the item and enter the return date. These fields are mandatory. Optionally, you can add a comment and photos. Then click on the "update" button to save the change.

9.3.3 9.3.3 Import and export of Asset data

To manage several data records at the same time, the import or export function is a good option.

9.3.3.1 9.3.3.1 Manual data import



For the **initial creation** of Asset data, download the template by clicking on the "Import" button in the "Search" area. In the newly opened dialog box, you will then download a template in .xlsx or .csv format. After adding the data and editing the file, drag and drop it into the upload area or alternatively use the browser upload function

Note: If you want to update existing data in the system, please use a current data export. See also *9.3.3.2 Asset data export*. Fig. 176 Data import

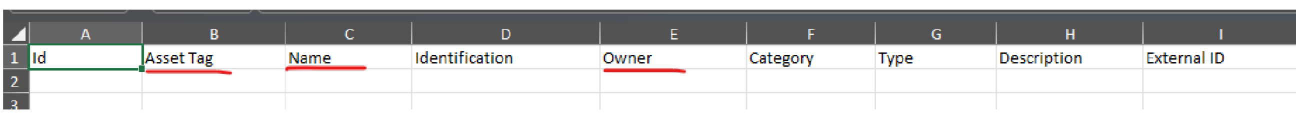


Fig. 177 Import file

Please note the **mandatory** fields for upload: Asset tag, name and owner.

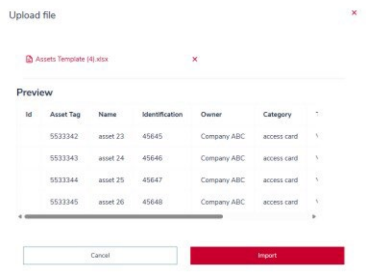


Fig. 178 Data Import Preview

Before the final data import, you will be shown a preview of the data to be imported. Make sure that all records are correct, and then click Import.

To cancel the import, click the "Cancel" button or close the window by clicking on the X in the upper right corner.

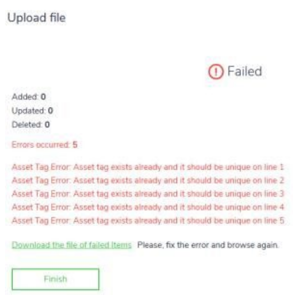


Fig. 179 Error Analysis Import

You will then receive a summary of the import.

If the upload failed, you will receive an error report and can upload the file again after correcting the mentioned records.

Complete the process with "Finish".

Fig. 180 Successful import

After a **successful** upload, you will be shown a success message, which you can then close. The uploaded Asset data is then listed in the "Search" area in the Asset list and can be edited there.

9.3.3.2 9.3.3.2 Asset data export

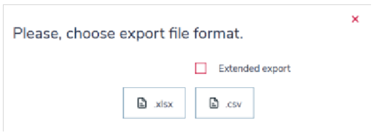


Fig. 181 Asset export

Use the export of the Assets to check and update several data records at the same time.

Click on the "Export" button, select a format (.xlsx or .csv) and the file will then be automatically downloaded to your device. If the "extended export" checkbox is activated when downloading, not only the last status of the Asset is displayed, but also each status with the time data for each Asset.

Modify records: Make changes to data and save them in the previously exported document. **Note:** a status change is not possible.

Add new records: To add new records, simply append them to rows below.

Note: please note that records without a systemic ID are also added to the system twice.

After all the desired changes have been made in the exported document, the file can be imported again. Cf. *9.3.3.1 Manual data import.*

9.4 9.4 Create an asset

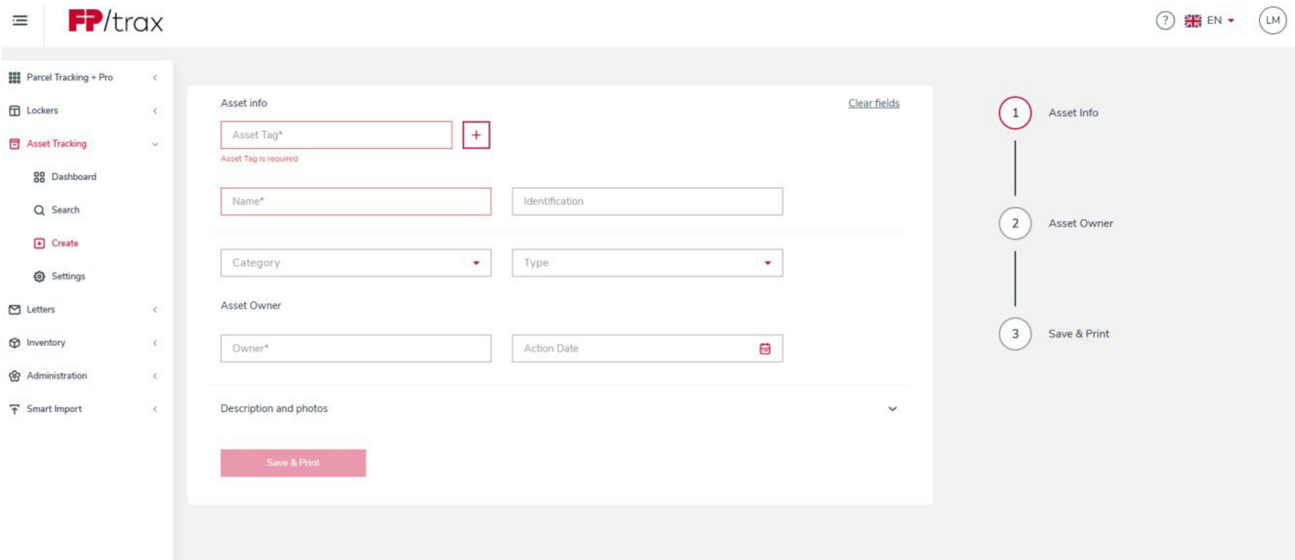


Fig. 182 Create an Asset

To create a new item, go to **Asset Tracking** and click **Create**. Fields marked with an asterisk (*) are required. All other fields are optional.

In the form, you can either enter an existing barcode for the asset or generate one automatically by clicking the **plus (+) icon**. In the **Name** field, enter a clear label for the item.

In the **Identification** section, you can add details such as a serial number, device model, or a vehicle's license plate number. Then select the appropriate **category** and **type**. If needed, you can extend the list of available categories and types (see section **9.5.1 Category & Type**).

If the item is not currently rented out, select the **person or location** where it will be stored. You can also enter a **maintenance or service date**. Optionally, you may add a comment or upload an image for the asset.

When you are done, click **Save & Print**. The print dialog opens automatically, allowing you to print a label for the item (see section **12.4.3 Asset**).

9.5 9.5 Settings

9.5.1 9.5.1 Category & Type

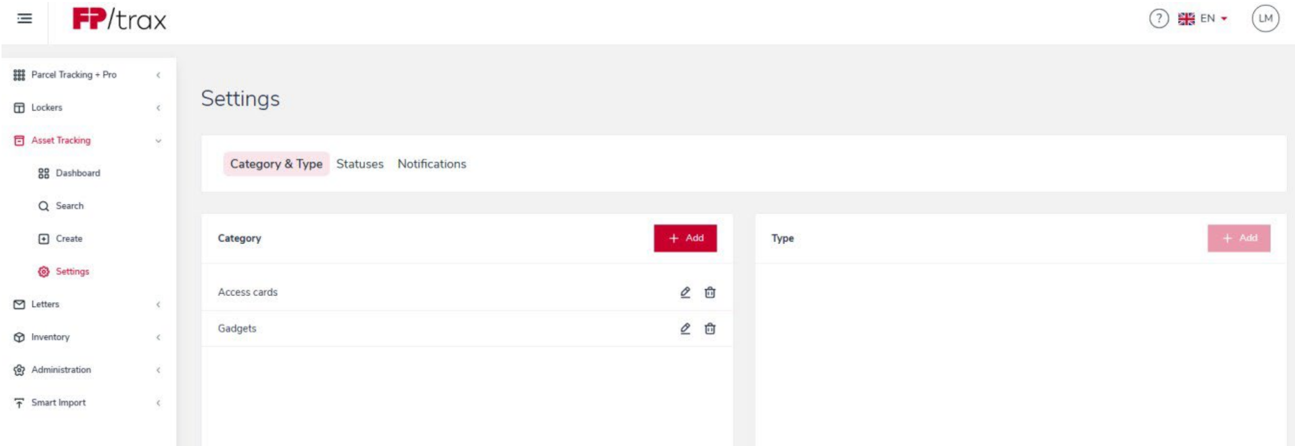
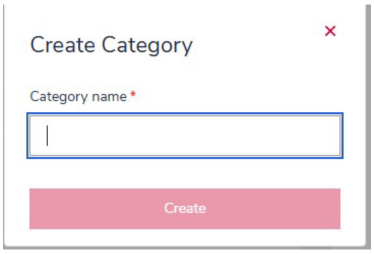


Fig. 183 Assets > Settings > Category & Type

Create new categories and associated types in this area so that you can select them from the corresponding drop-down menus when creating new items.

9.5.1.1 9.5.1.1 Add Category

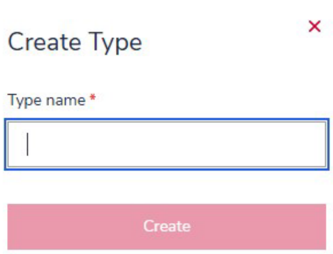


In the **Category** section, click **Add** and enter a name for the new category in the **Category Name** field. Confirm your entry by clicking **Create**.

The newly created category will appear in the category list on the left. You can repeat this process to add as many categories as needed.

Fig. 184 Add Category

9.5.1.2 9.5.1.2 Add Type



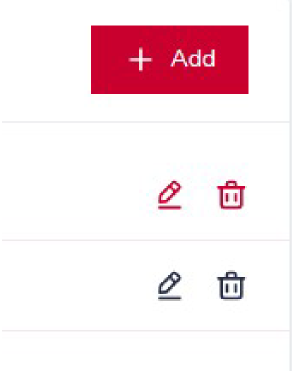
[illegible] **category** [illegible] **Type** [illegible]

[illegible] **Type** [illegible] **Add** [illegible] **Type Name** [illegible] **Create** [illegible]

Fig. 185 Add Type

[illegible]

9.5.1.3 9.5.1.3 Edit category or type

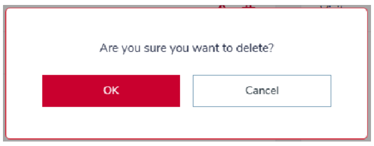


Click the **pencil icon** in the row you want to edit. After making your changes, click **Update** to save them. The updated information will appear in the list.

If you want to discard your changes, close the input window by clicking the **X** in the upper-right corner.

Fig. 186 Edit Category/Type

9.5.1.4 9.5.1.4 Delete category or type



Click the **trash can icon** in the row you want to delete. Confirm the deletion by clicking **OK**. The item will be removed and no longer appear in the list.

To cancel the deletion, click **Cancel**. *Fig. 187 Delete category/type*

9.5.2 9.5.2 Status

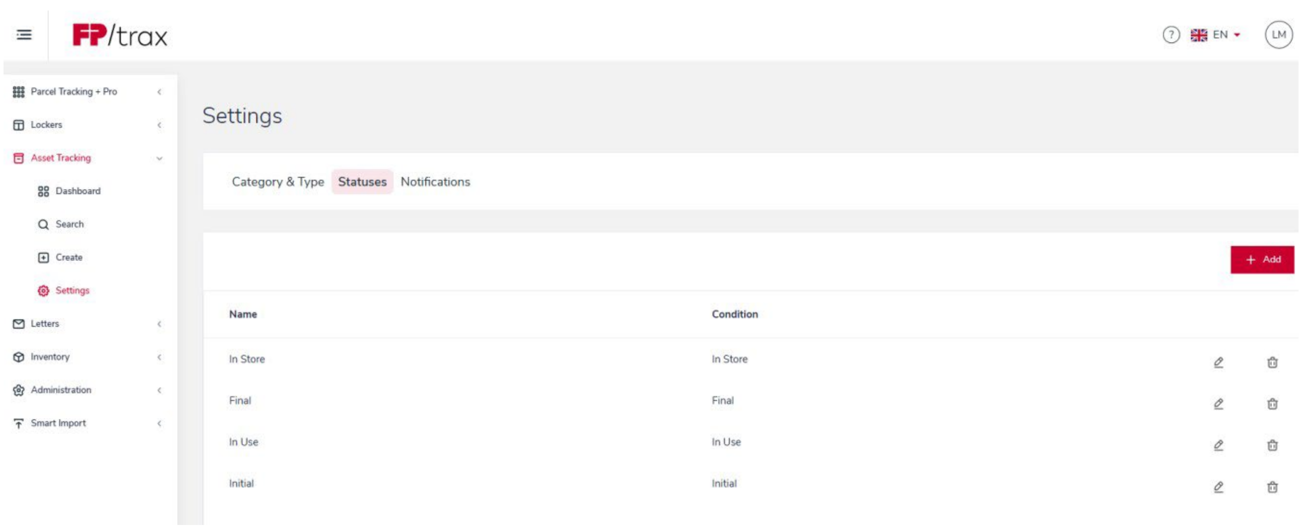


Fig. 188 Assets > Settings > Status

9.5.2.1 9.5.2.1 Add new status

To add a new status, click **Add**, enter a name for the status, and select an appropriate **condition** from the drop-down menu:

9.5.2.2 • Initial

This status can only be used once. It is automatically assigned to an item when it is created for the first time.

9.5.2.3 • In use

This status can be used multiple times and describes the condition of an item when it is not stored in the warehouse, for example *loaned out* or *external maintenance*.

9.5.2.4 • In store

This status can also be used multiple times and describes the condition of an item while it is stored in the warehouse, for example *returned* or *internal cleaning*.

9.5.2.5 • Final

This status indicates the end of an asset’s lifecycle, for example when an item has been disposed of and is no longer available. You can have various final statuses.

After selecting the condition, click **Create** to save the new status.

9.5.2.5.1 9.5.2.2 Edit status

To edit a status name, click the **pencil icon** in the corresponding row. Make your changes and click **Update** to save them.

If you want to discard the changes, close the input window by clicking the **X** in the upper-right corner or by clicking outside the input window.

9.5.2.5.2 9.5.2.3 Delete status

To delete a status, click the **trash can icon** in the corresponding row. Confirm the deletion by clicking **OK**, or cancel the process by clicking **Cancel**.

9.5.3 9.5.3 Notifications

You can link **notifications** to specific statuses and assign them to selected groups of recipients. For each notification, you can configure **one or more reminders** as needed.

9.5.3.1 9.5.3.1 Notification management

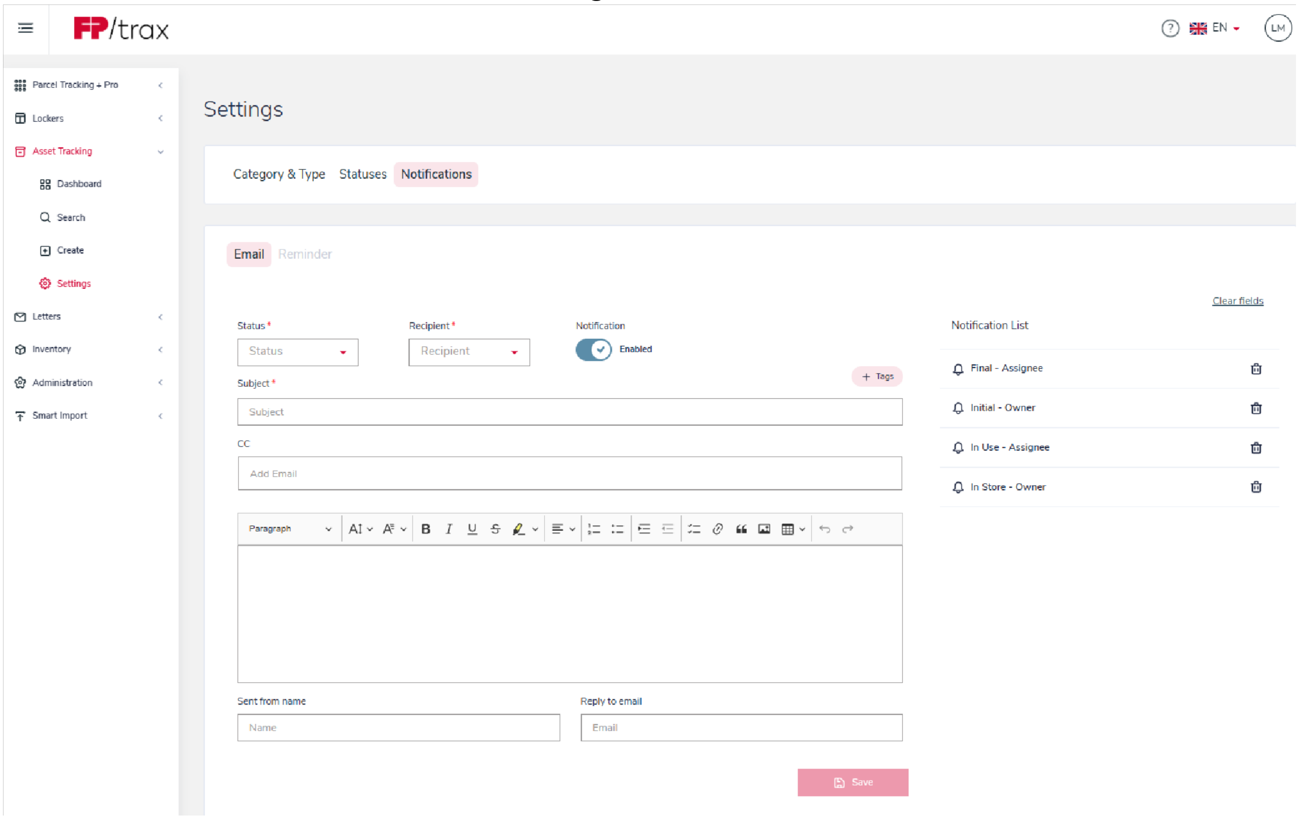


Fig. 189 Create custom notifications

To create a new notification, go to **Asset Tracking › Settings › Notifications**. First, select the **status** and the **recipient group** for which you want to create an email notification.

Then enter a **subject** and write the **message content**. You can format the email text as needed before saving the notification.

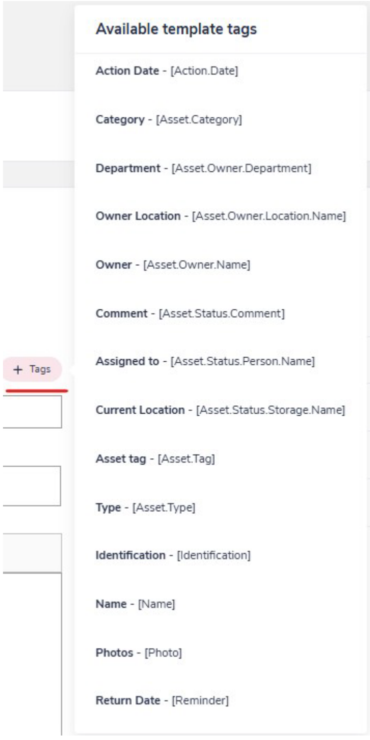


Fig. 190 Selecting tags for a notification

Add tags to your notification

Tags are placeholders that are automatically replaced with information from the relevant transaction when the notification is sent.

Click the **Tags** button to open a list of all available tags. Select a tag to insert it into the **message body**. Once the notification is triggered, the tag will be replaced with the corresponding data for that transaction.

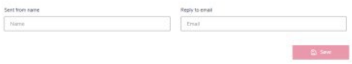


Fig. 191 Sent from name and reply to email

Sender information

If you enter text in the **Sent from name** field, it will be displayed to the recipient as the sender's name of the notification.

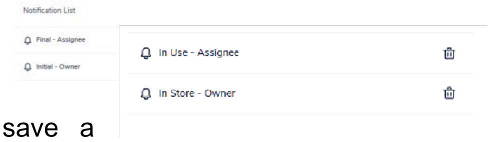
To receive responses from notification recipients, specify an email address in the **Reply-to email** field. Replies will then be delivered to the entered address.

(De)activating notification sending

You can use the "Notification Enabled" toggle to enable or disable the sending of notifications.

Fig. 192 Activation button

Disabled notifications are not sent and appear with a crossed-out bell in the list of notifications.



Save/edit/delete notification

After you save a new notification by clicking **Save**, it will appear in the notification list on the right.

Fig. 193 List of Email Notifications

You can delete a notification using the **trash can icon**. To edit an existing notification, click it once in the list on the right, make your changes in the form, and then click **Save** to apply the updates.

9.5.3.2 9.5.3.2 Management of reminders

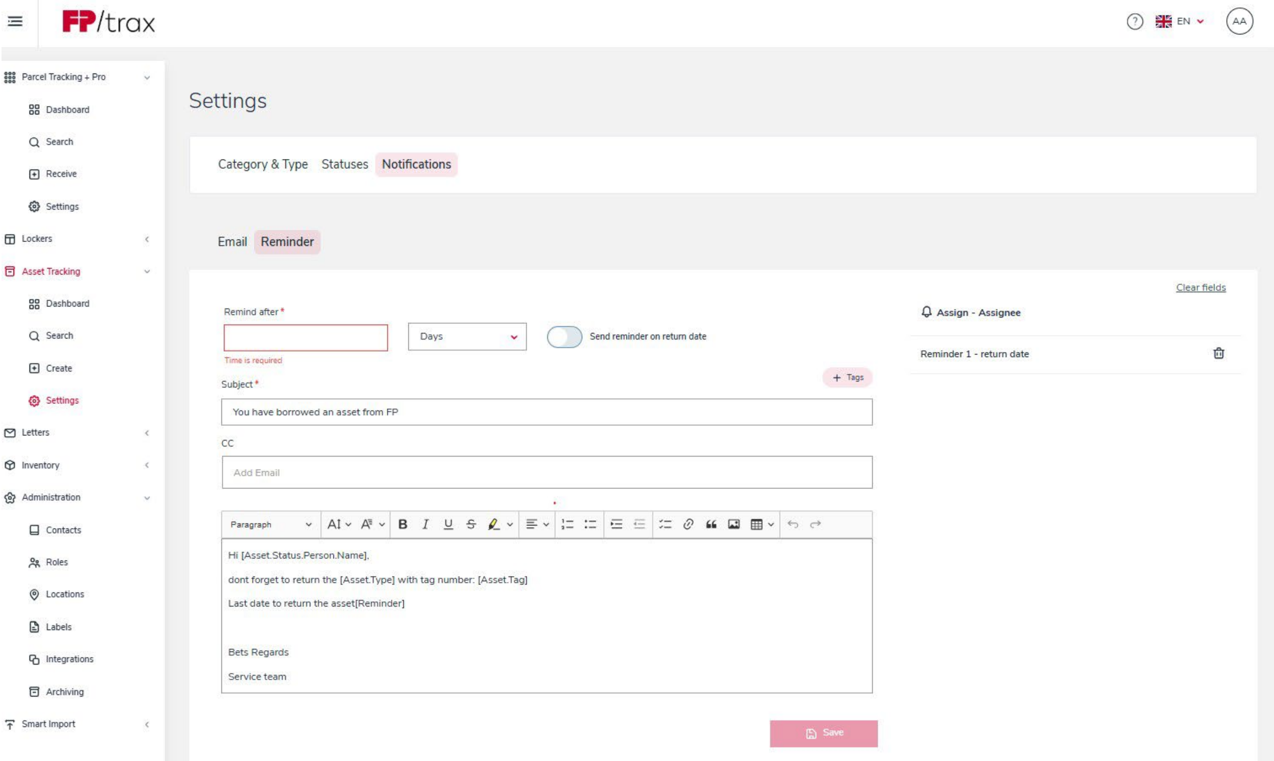
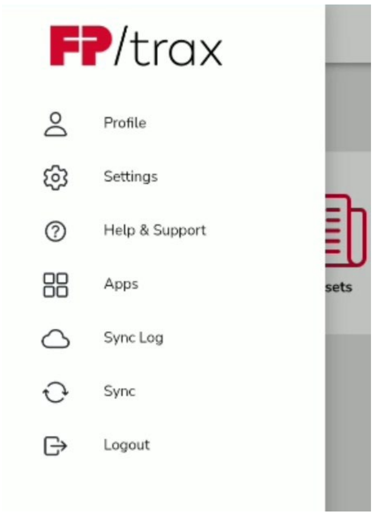


Fig. 194 Asset tracking > Settings > Notification > Email

9.6 9.6 Asset management in the FP Trax Mobile App

9.6.1 9.6.1 Module selection



9.6.1.1 Main Menu > Apps

To manage an item, select the "Apps" section from the main menu in the FP Trax app. The main menu can be opened by clicking on the burger menu/three horizontal lines in the top left.

Fig. 195 Main Menu > Apps

9.6.1.2 Selection of the module

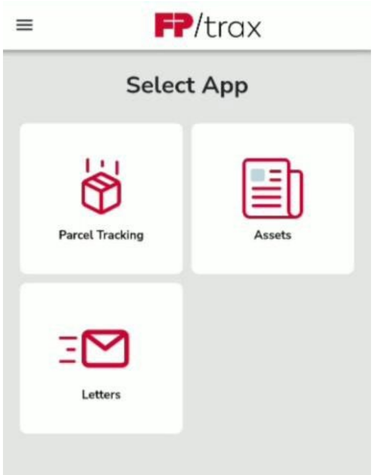
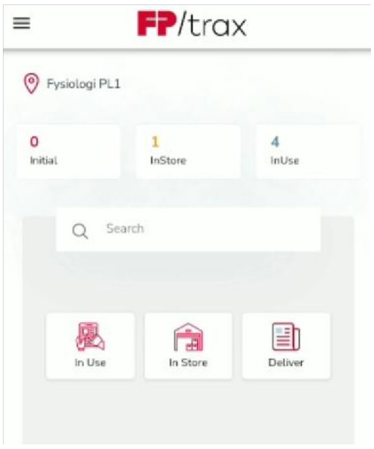


Fig. 196 Apps > Modules: Assets

After clicking on Apps, the modules available to you will be displayed as individual tiles. Select the Item tile by clicking on it.

Note: Based on your order/activation of the FP Trax products, the view of this image may differ from your actual view.

9.6.2 9.6.2 Asset tracking > Home screen



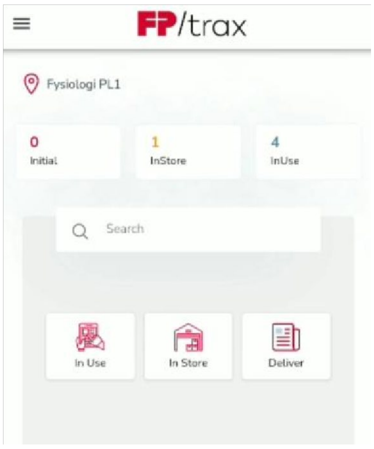
On the home screen in the Asset Tracking module, you will get an overview of the number of items that have been created, are in store or are in use. You can also search for an item using the search bar.

You can use the tiles to output, return or dispose of items.

Note: the tile name corresponds to the status designation you assigned and may differ from the designations shown here. Cf. *9.5.2 Status*

Fig. 197 Asset Tracking: Home Screen

9.6.3 9.6.3 Asset tracking > Asset search



You can search for an item in the FP Trax app in different ways.

1) Enter a term in the search bar and start the search process by clicking on the magnifying glass icon in the bottom right corner of your keyboard.
2) Click on a status tile with the number of items that are in this status. Enter a term in the search line and start the search process by clicking on the magnifying glass icon in the bottom right corner of your keyboard. Browse all items with this status.

Fig. 198 Asset Tracking: Home Screen

9.6.4 9.6.4 Asset tracking > Search > Asset details

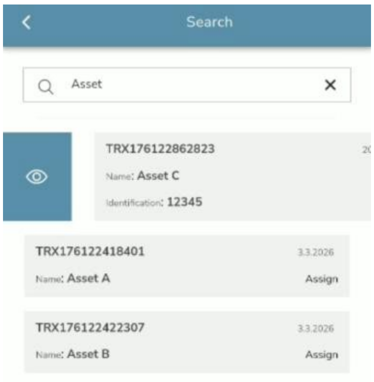


Fig. 199 Open product details

If you want to view the details of an Asset, swipe right over the displayed Assets and click on the eye icon.

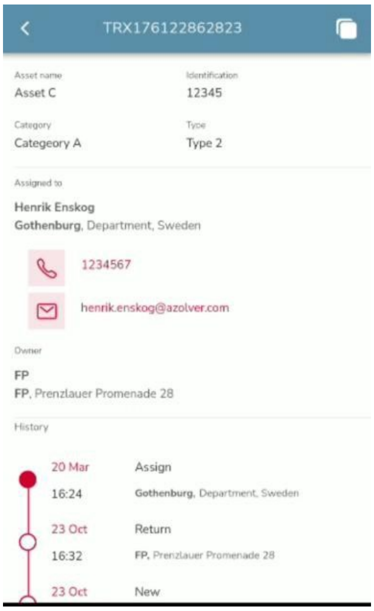


Fig. 200 View product details

According to your permissions, you will be shown the details of the shipment. In the top line with the Asset number, you can copy the Asset number by clicking on the copy icon.

9.6.5 9.6.5 Asset Tracking > Loan/Borrow the Item

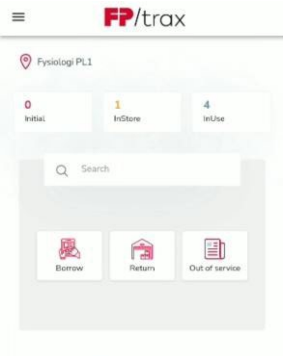
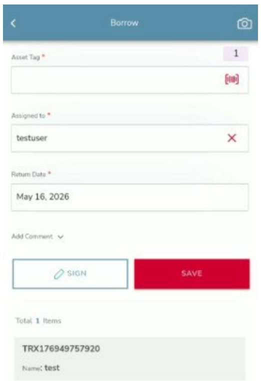


Fig. 172 Asset Borrow



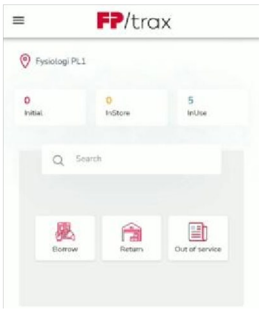
To loan/borrow your item, click on the first button here called ”Borrow”, scan the asset tag number, choose the Assigned to Person, and pick the Return date.

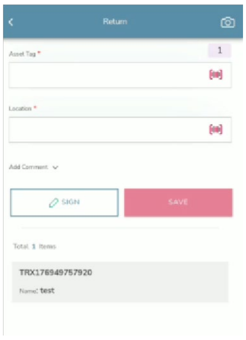
Sign and/or Save.

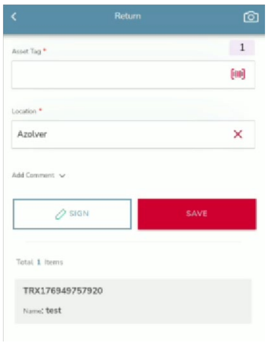
Fig.

171 Asset Home

screen Fig. 173 Asset Sign and Save







9.6.6 9.6.6 Asset Tracking > Return the Item

To return your item, click on the middle button here called ”Return”, scan the asset tag number, and scan or select the location the item get returned to.

Sign and/or Save.

Fig. 174 Asset Home screen

Fig. 175 Asset Return

Fig. 176 Asset Sign and Save

10 10 Letters

10.110.1 General information on letter management

The **Letter module** is primarily a **notification system** (not a tracking system). It allows you to create customized notifications for incoming letters, ensuring that employees are informed as soon as their mail is ready for collection. This helps them avoid unnecessary trips to the mailboxes.

10.210.2 Letter registration (FP Trax mobile app)

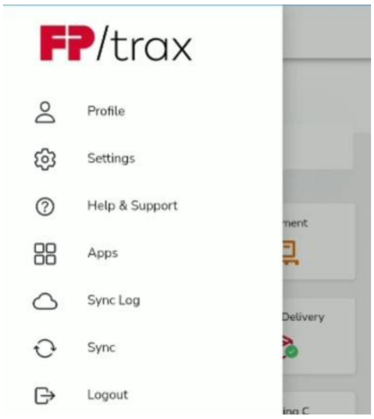


Fig. 2017 Main Menu > Apps

10.2.1 Main Menu > Apps

To register letters, select the "Apps" section in the main menu of the FP Trax mobile app. The main menu can be opened by clicking on the menu/three horizontal lines in the top left.

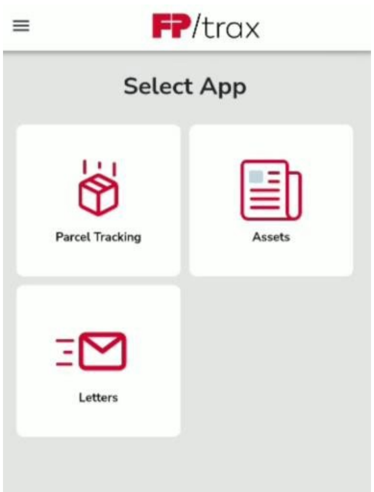


Fig. 202 Apps > Module: Letters

10.2.2 Selection of the module

After clicking on "Apps", the modules available to you will be displayed as individual tiles. Select the tile with the "Letters" tile by clicking on it.

Note: Based on your order/activation of the FP Trax products, the illustration of this area may differ from your actual view.

Fig. 203 Input field

Az

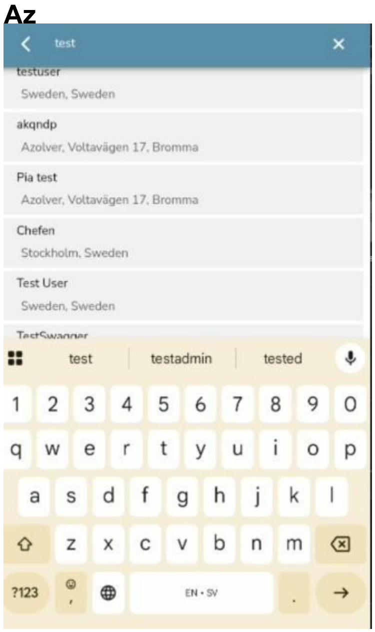


Fig. 204 Recipient drop-down menu

10.2.3 Input field > Selecting the recipient

After selecting the **Letter module**, the input field for the recipient is displayed.

Click inside the **recipient field** to open a drop-down list of all recipients stored in the system. You can start typing the recipient's name to narrow down the list. Once the desired recipient appears, select it by clicking on the entry.

For information on managing recipients, see section *12.1 Contacts*

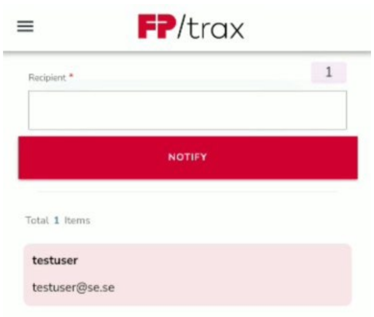


Fig. 205 Recipient added

Input field > Notify recipient

After selecting a recipient from the drop-down list, the recipient is displayed below the **Notify** button. The total number of selected recipients is shown above the input field on the right side of the screen.

The **Notify** button becomes active and can be clicked. You can repeat the selection process to add more recipients. The number of recipients will update automatically, and the list will expand accordingly.

Click **Notify** to send an email notification to all selected recipients, informing them that their letters are ready for collection (see section *10.5.2 Settings > Notifications*). In addition, the stored information is made available in the web app in the dashboard and in the search. Cf. *10.3Ă Letter* Dashboard *and* åq.*4ĂSearch*

10.310.3 Letter Dashboard

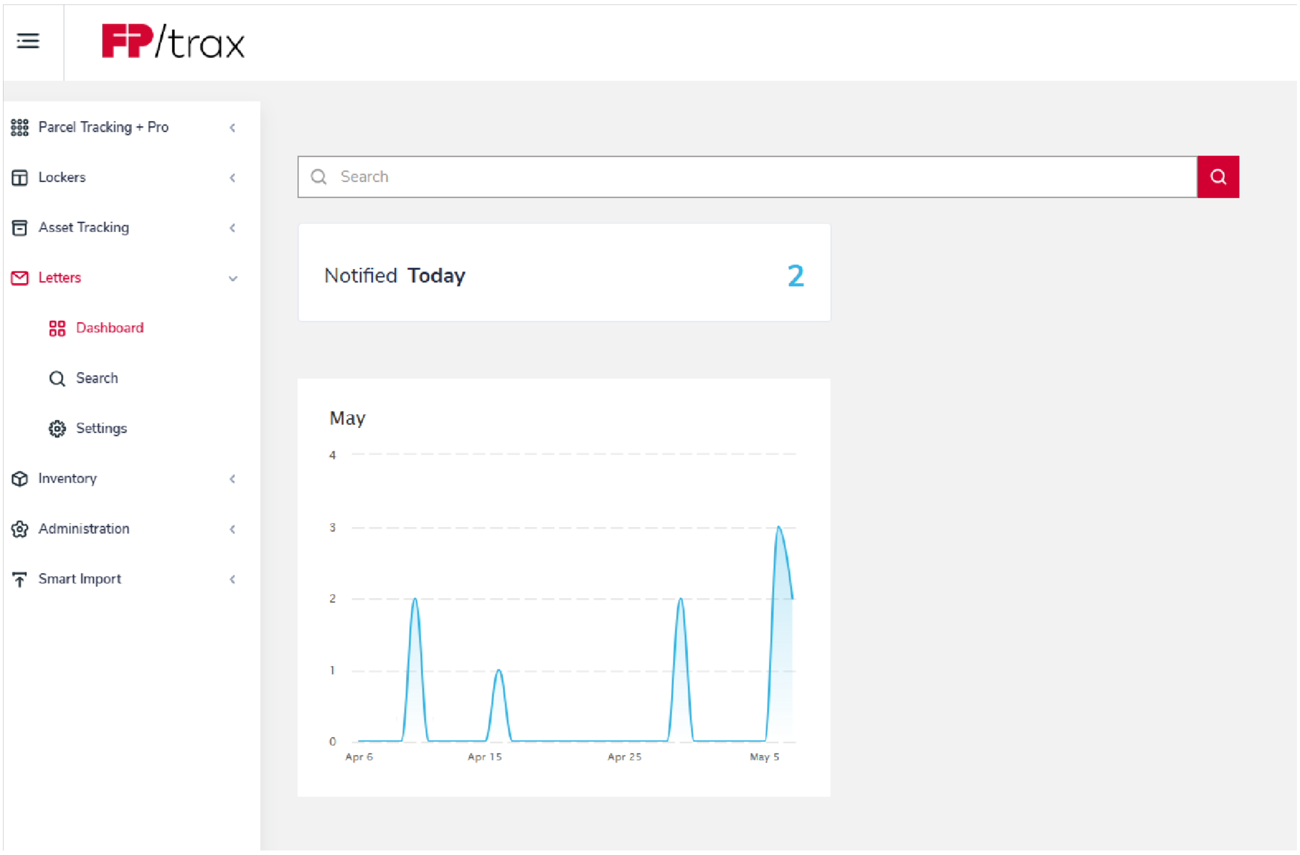


Fig. 206 Letters > Dashboard

In the **Letters › Dashboard** section, you will see a **daily updated overview** of the number of letters received.

Use the **search bar** to find specific entries. For example, enter the name of a recipient and either click the **magnifying glass icon** or press the **Enter** key to start the search.

The results are displayed in a table. If no matching entries are found, the table will appear empty.

10.410.4 Search

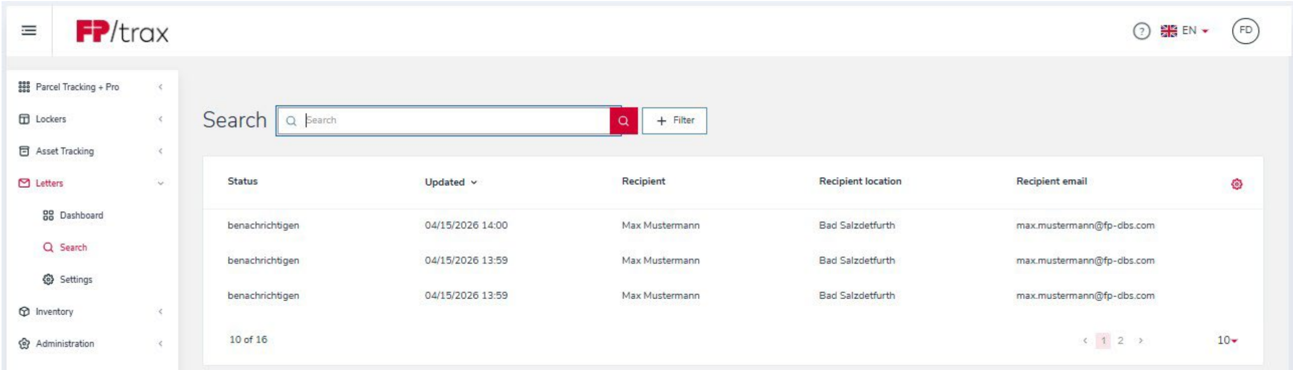


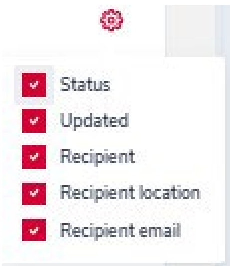
Fig. 207 Letters > Search

The **Search** menu item takes you to a list of all recorded letters.

You can use the search function to find and filter letters based on any available parameter. Enter a search term in the search bar and either click the **magnifying glass icon** or press the **Enter** key.

The list will be updated to show only the matching results. If no results are found, the list will appear empty.

10.4.1 10.4.1.1 Overview table > Adjustment of columns

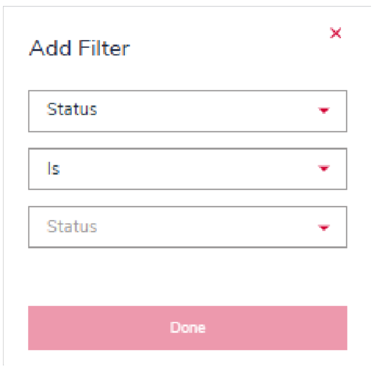


You can customize the columns in the **letter list** using the **gear icon** in the column header.

Use the checkboxes to **show or hide individual parameters** according to your needs.

Fig. 208 Selection criteria for letter overview

10.4.2 10.4.1.2 Search > Filter



You can use the available filters to refine the letter list based on different parameters and display only the relevant results.

Fig. 209 Filter selection Search field

10.510.5 Letters > Settings

10.5.1 10.5.1 Settings > Status

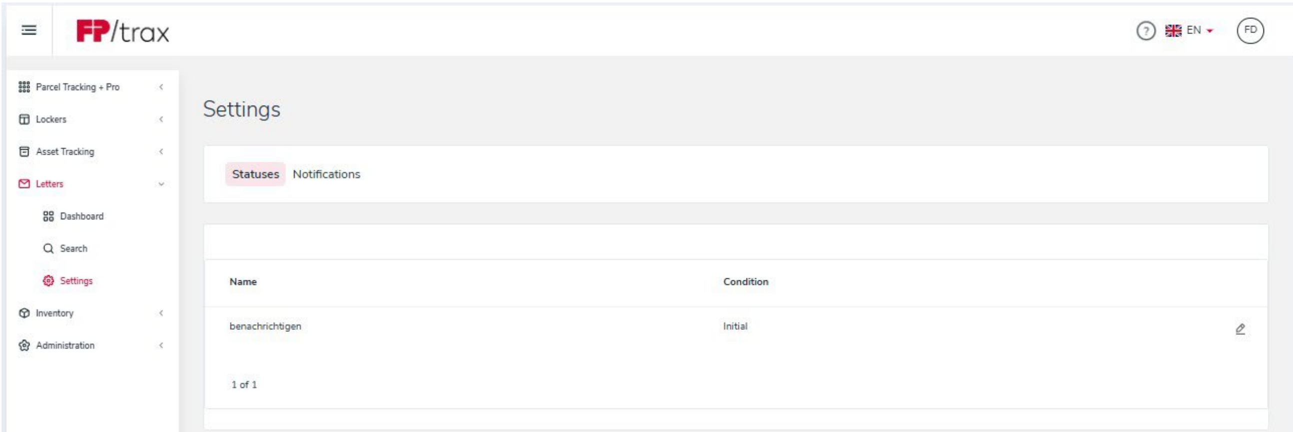


Fig. 210 Letters > Settings > Status

To use the letter function, only an initial/original status is required. You can name this according to your wishes. To do this, click on the pencil icon. For example, you can call the initial status "capture", "receive" or "notify".

10.5.2 10.5.2 Settings > Notifications

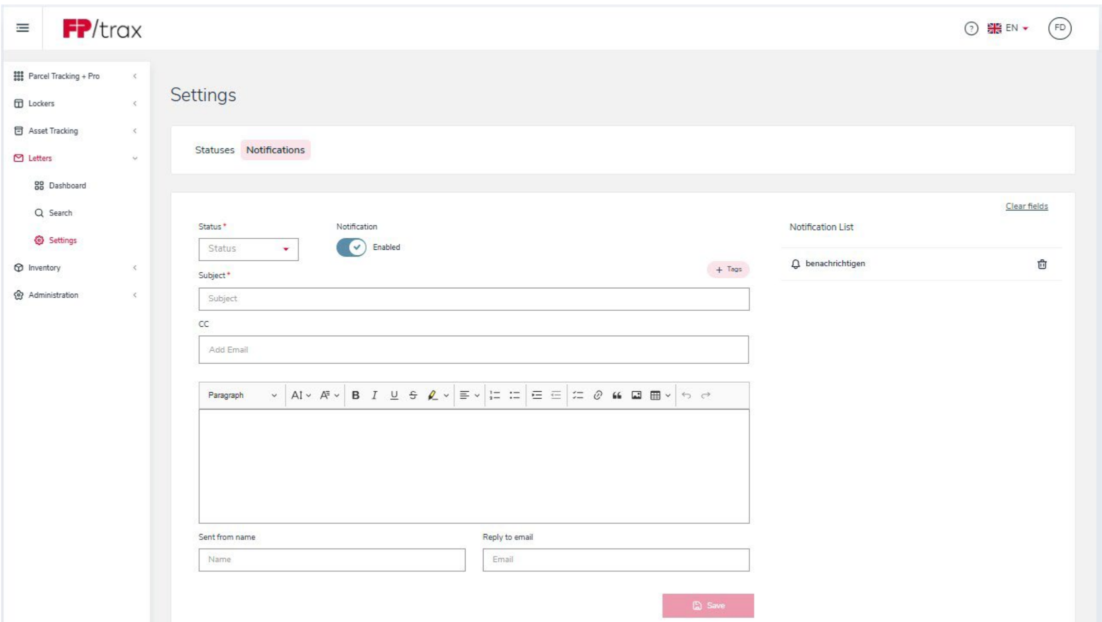


Fig. 211 Letters > Settings > Notifications

You can customize the notification that is sent to a letter recipient. To do this, select the status and write a unique subject and content text. You can then format your text.

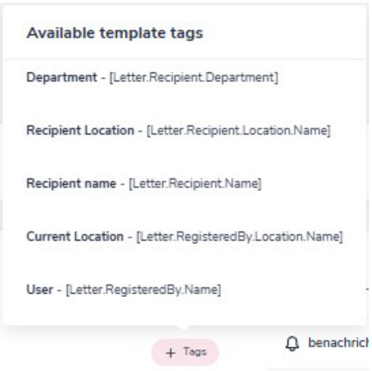


Fig. 212 Selecting keywords for an email

Add tags to your notification

Tags are individual content that is stored when the parcel is recorded for the respective shipment and whose content can then be displayed in the notification.

The "Tags" button allows you to open a list of all available tags. By clicking on the tag once, this placeholder will be integrated into your email body or in the subject line.

Fig. 213 Sent by and reply to

10.5.2.1 Store sender information

When you enter text in the "Sent from" field, the recipient will see it as the sender name of the notification.

If you enter an email address in the Reply to Email field, the notification recipient's reply will be sent to the email address you specified. If no information has been provided, all inquiries/answers will be sent directly to FP Trax Support.

10.5.2.2 Enable/disable notification

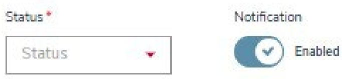


Fig. 214 Activation button

You can use the "Notification Enabled" toggle to enable or disable the sending of notifications.

Disabled notifications are not sent and appear with a crossed-out bell in the list of notifications.

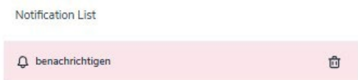


Fig. 215 List of Email Notifications

Save/edit/delete notification

As soon as you have created the new notification via the "Save" button, it will appear in the notification list on the right.

Notifications can be removed via the trash can icon.

You can adjust existing notifications by selecting them from the list on the right, making the changes in the form and then confirming them with the "Save" button.

11 11 Inventory

11.111.1 General information about the FP Trax Inventory Module

Digitize your warehouse management with FP Trax to maintain complete visibility of your inventory at all times. Real-time visual indicators alert you when items need replenishing, enabling faster responses to demand changes while minimizing both overstock and shortages.

11.211.2 Inventory list

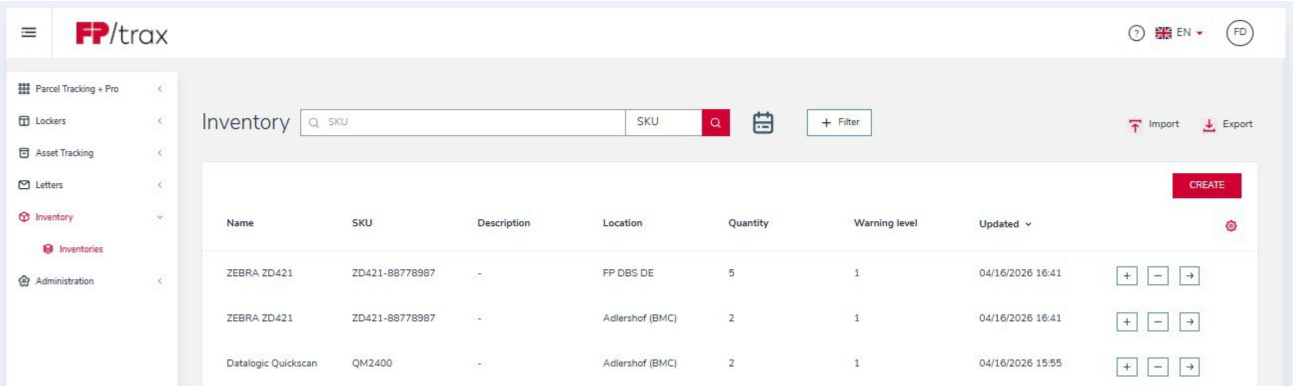


Fig. 216 Stock > Stocks

The menu item "Inventories" takes you to the list of all recorded inventories.

11.2.1 11.2.1.1 Inventories > Create a new item

To create a new inventory item, click **Create** in the upper-right corner.

Enter the following details in the form:

- **SKU number** – or generate one automatically by clicking the **plus (+) icon**
- **Name/Designation**

Fig. 217 Stock > Create

- **Available quantity** in the warehouse
- **Reorder level** (the quantity at which a new order should be triggered)
- **Location**
- *(Optional)* A **description**, such as additional information about the item or ordering details

Click **Create** to save the new inventory item.

To cancel the process, close the form by clicking the **X** in the upper-right corner.

11.2.1.2 Stocks > Search Item

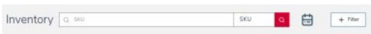


Fig. 218 Stock > Search

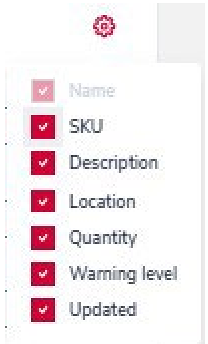
Use the search bar to find and filter assets by entering a term and clicking the magnifying glass or pressing **Enter**. The list will display only matching results or remain empty if none are found.

11.2.1.3 Filter inventory list

Use the available filters to narrow down the inventory list based on different parameters and display only the relevant items.

Fig. 219 Filter selection

11.2.2 11.2.1.4 Stocks > Column Adjustment



The columns displayed in the stock overview can be adjusted using the **gear icon** in the header row. Use the checkboxes to enable or disable specific parameters.

Fig. 220 Selection criteria for an overview of the stock

11.2.3 11.2.2 Modify inventory

11.2.3.1 11.2.2.1 Change Item Quantity

You can **increase or decrease the stock level** in the **stock overview** or in the **item details** by clicking the **plus (+)** or **minus (–)** icons.

Enter the desired quantity in the field and confirm the change by clicking the corresponding button.

Fig. 221 Adjust quantity

To cancel the change, close the input window by clicking the **X** in the upper-right corner.

11.2.2.2 Move Location

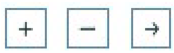


Fig. 222 Status > move to another location

To change the location of one or more items, click the **arrow icon** in the **inventory overview** or in the **item details**.

Enter the new **location** in the field, specify the **quantity**, and optionally add a **comment**.

Click **Move** to confirm the change. To cancel, close the window by clicking the **X** in the upper-right corner.

11.2.4 11.2.3 Stock item details

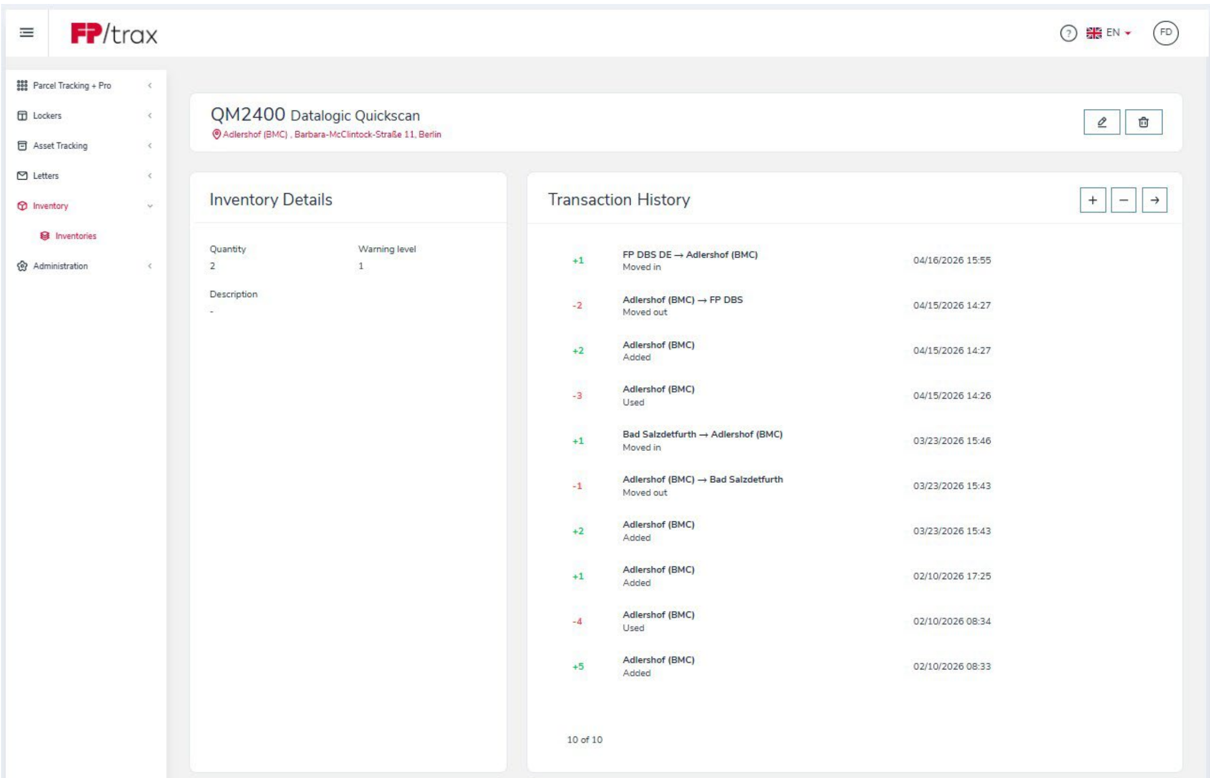
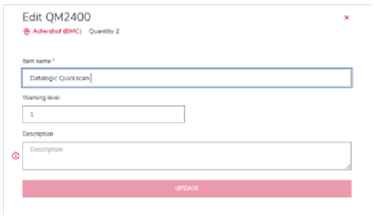


Fig. 223 Detailed view of the existing stock

Click on an item in the **inventory overview** to open its **detailed view**.

In the detailed view, you can see all relevant information about the item, including its **name**, **location**, **quantity**, **warning level**, and **description**. On the right side, the **chronological transaction history** is displayed.

11.2.4.1 11.2.3.1 Stock Item Details > Edit Item



To edit an inventory item, click the **pencil icon** in the upper-right corner of the detail view.

After making your changes, click **Update** to save them. To cancel the process, close the window by clicking the **X** in the upper-right corner.

Fig. 224 Edit Item

11.2.4.2 11.2.3.2 Stock Item Details > Delete Item

To delete an item, click the **trash can icon** in the item details.

Confirm the deletion by clicking **OK** or cancel the process by clicking **Cancel**.

Fig. 225 Delete Item

11.2.4.3 11.2.3.3 Inventory Item Details > Transaction Details

To view transaction details, click on a transaction in the **item details** in the right-hand column.

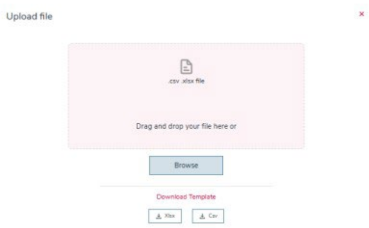
The detailed view shows information such as the **quantity**, the **comment**

Fig. 226 Item Details > entered during the transaction, any **location changes**, and the *Transaction details* corresponding **timestamp**.

11.2.5 11.2.4 Import and export of inventory data

To manage multiple data records at once, you can use the **import and export functions**.

11.2.5.1 11.2.4.1 Manual data import



To create item data for the first time, click the **Import** button to download a template. In the dialog that opens, you can choose to download the template in **.xlsx** or **.csv** format.

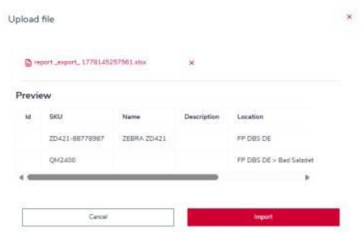
After entering or editing the data in the file, upload it by either **dragging and dropping** it into the upload area or by using the **file upload function**.

Note: To update existing data in the system, please use current **data export**. See also *11.2.4.2 Inventory Data Export*. *Fig. 227 Data import*

	A	B	C	D	E	F	G	H	I
1	Id	SKU	Name	Description	Location	Quantity	Warning level	Updated	Created
2									

Fig. 228 Import file

Please note the mandatory fields for the upload: **SKU**, **Name**, **Location** and **Quantity**. Please also note the descriptions of the individual columns in Register 2 of the document.



Before completing the import, you will see a **preview of the data** to be imported. Review the entries carefully to ensure that all records are correct, then click **Import** to proceed.

To cancel the import, click **Cancel** or close the window by selecting the **X** in the upper-right corner.

Fig. 229 Data Import Preview

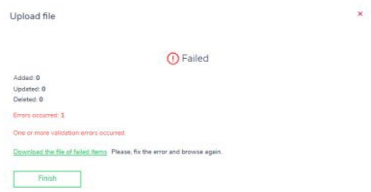


Fig. 230 Error Analysis Import

After the import, a **summary of the results** is displayed.

If the upload fails, an **error report** will be provided. Correct the indicated records and upload the file again.

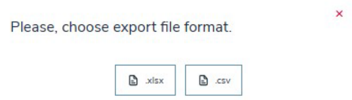
Click **Finish** to complete the process.

After a successful upload, a **confirmation message** will be displayed. You can close this message once you have reviewed it.

The uploaded **inventory data** is then available in the **Search** section of the item list, where it can be viewed and edited.

Fig. 231 Successful import

11.2.5.2 11.2.4.2 Inventory Data Export



Use the **export function** to review and update multiple stock items at once.

Click **Export**, choose your preferred format (**.xlsx** or **.csv**), and the file will be downloaded automatically to your device.

Fig. 232 Stock Export

Modify existing records: Edit the data in the exported file and save your changes.
Note: Status changes are not supported via import.
Add new records: To add new items, simply enter them in additional rows at the end of the file.

Note: Records without a system ID will be treated as new entries and may be added as duplicates.

Once all changes are complete, upload the file again using the **import function**. Cf. *11.2.4.1 Manual data import*.

12 12 Administration

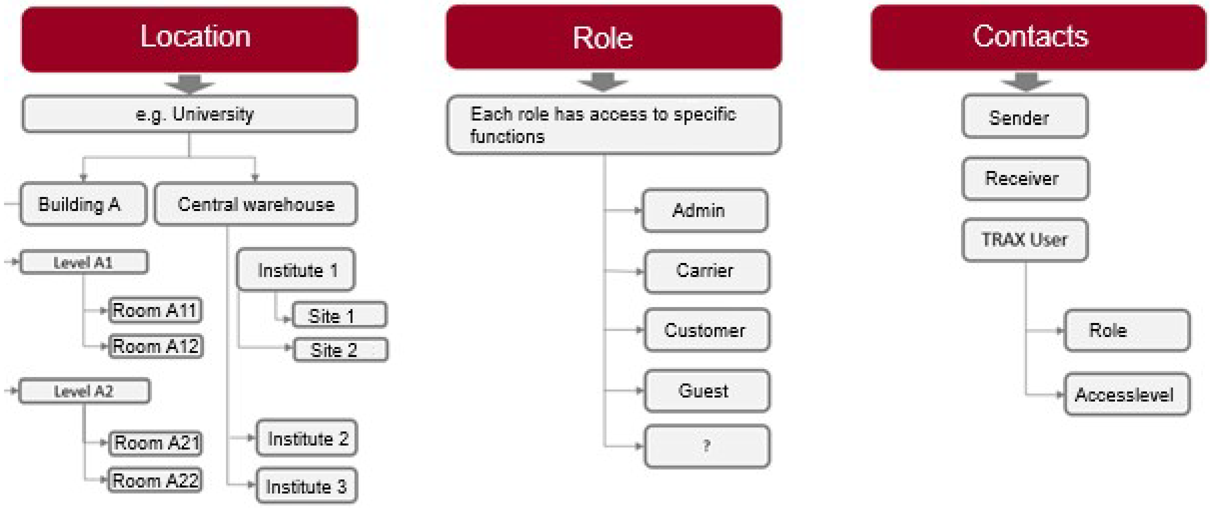


Fig. 233 Management of locations, roles and contacts

In the **Administration** section, you can manage contacts, roles, and locations, as well as configure labels, automate data imports, and set archiving criteria.

12.112.1 Contacts

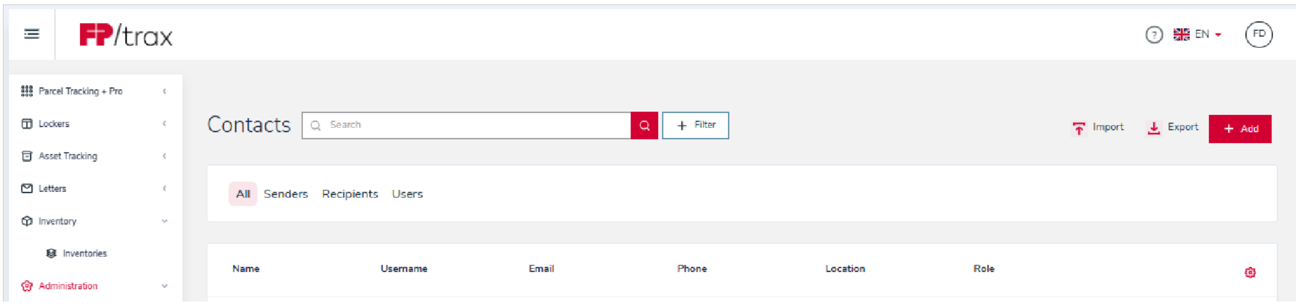


Fig. 234 Management of contacts

The **Contacts** submenu allows you to view and manage all stored contacts. You can use the search bar to quickly locate a specific contact or filter the list using various criteria.

In addition, the contact list can be exported to an Excel or csv document but can also be imported (cf. *12.1.2 Import and export of* contacts) or individual contacts manually (cf. *12.1.1 Add contacts manually*) can be added.

The **Contacts** list displays all contacts by default and can be filtered by the categories **Sender**, **Recipient**, or **User**.

12.1.1 • Sender

Contains information about the sender of a shipment. For this type of contact, entering a name is sufficient.

12.1.2 • Recipient

Refers to individuals within your organization who receive deliveries. A recipient is created in the system with at least a **name** and a **location**.

12.1.3 • User

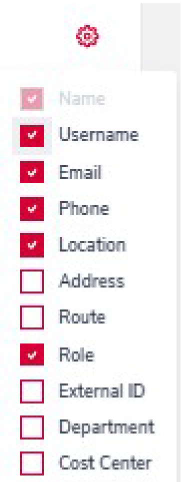
A user is assigned a specific role, such as: ○

Administrator ○ **User** (handles

shipment processing) ○ **Guest** (parcel

recipient with portal access)

Users have access to the system and can view relevant information, such as their own shipment overview.



Using the gear icon, the columns of the contact list can be individually selected and shown or hidden.

Fig. 235 Column Selection

12.1.4 12.1.1 Add contacts manually

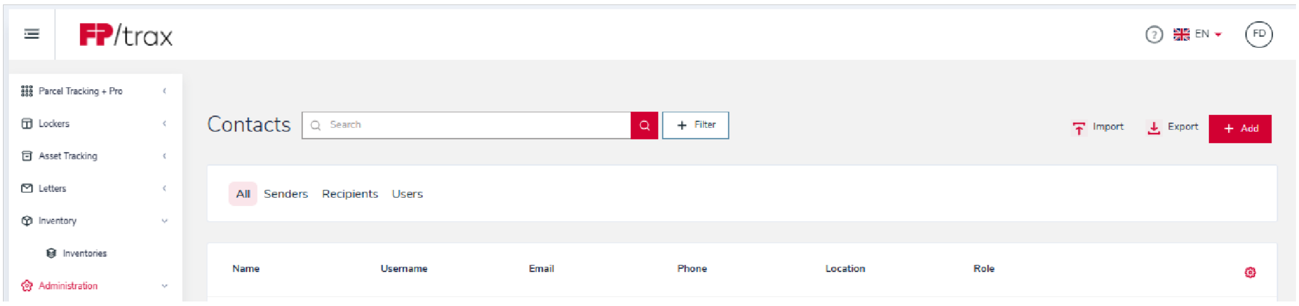
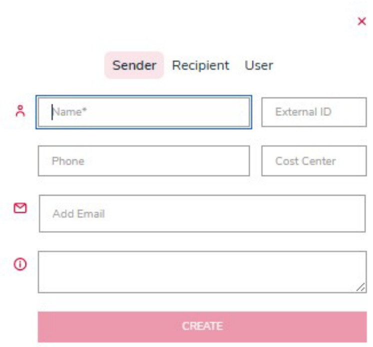


Fig. 236 Management of contacts

To add a new contact manually, click **Add**. This opens a dialog with the input fields for the contact details.

First, select whether you want to create a **Sender**, **Recipient**, or **User** by choosing the corresponding tab. The input fields will automatically adjust based on your selection.

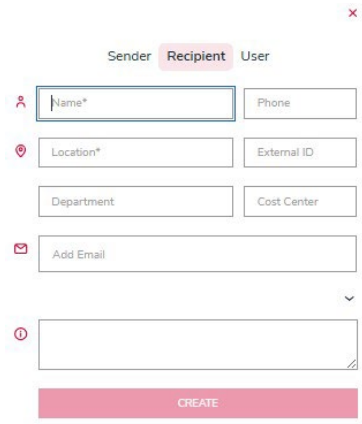
12.1.4.1 12.1.1.1 Sender



Enter the sender details and click **Create** to save. Required fields are marked with an asterisk (*). Optional fields allow you to add additional contact information.

Fig. 237 Create new sender

12.1.4.2 12.1.1.2 Recipients



To create a new recipient, enter the required information and click **Create**. Fields marked with an asterisk (*) are mandatory.

- **Name*** – Name of the recipient
- **Phone** – Recipient's phone number
- **Location*** – Location where parcels will be delivered
    - Start typing the first few letters to see matching entries in the drop-down list
    - Locations must be created in advance

(see section 12.3 Locations)

- **External ID** – For example, a personnel number or TRAX ID for private parcel delivery

Fig. 238 Create new recipient

- **Department** – Recipient's department
- **Cost Center** – Recipient's cost center
- **Email(s)** – Email address used for system notifications
- **Information** – Additional relevant details about the recipient

Note: If you want recipients to have access to the portal and view their own parcel overview, create them as a **User** with the role **Guest**.

12.1.4.3 12.1.1.3 Users

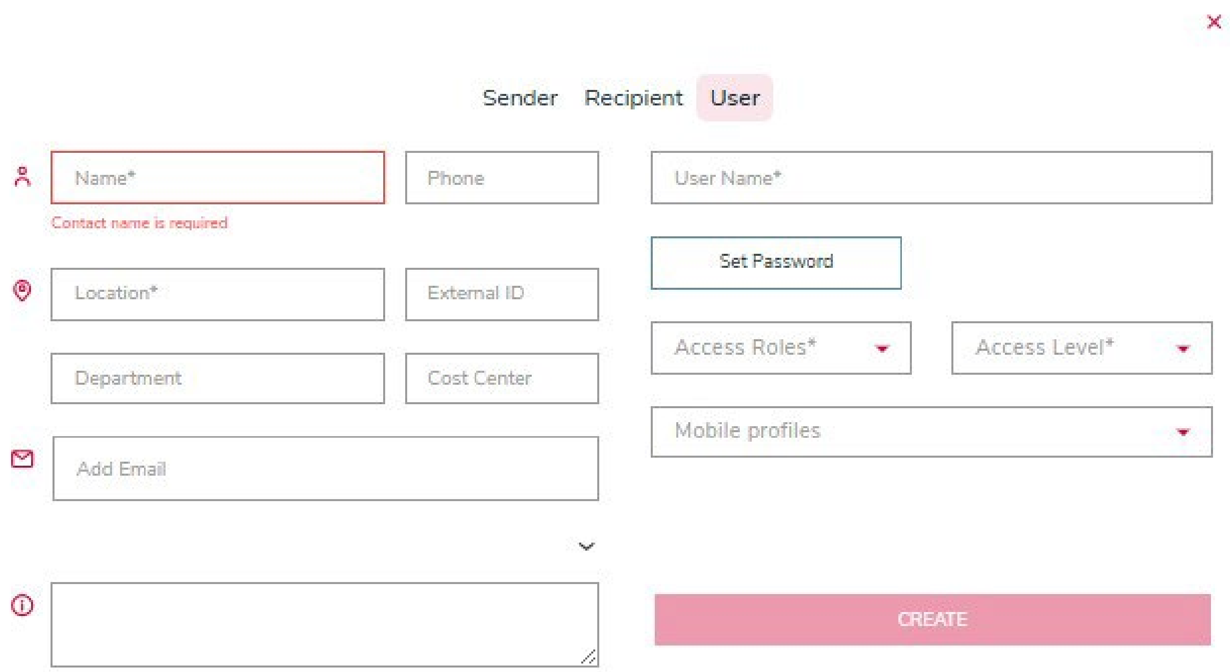


Fig. 239 System Users

Enter the required user details and click **Create** to save. Fields marked with (*) are mandatory. Users can also be used as senders or recipients and will appear as such in the system.

Name* = Name of the user

Phone = User's Phone Number

Location* = location of the user (cf. *12.1.1.2 Recipients*)

External ID = e.g. personnel number or TRAX ID for receiving private parcels

Department = User's Department

Cost Center = Cost Center of the User

Email = User's email address

Information = other relevant information about the user

Username* = username of the user. For example, the e-mail address or a pseudonym

Password = User's password. The user can change this in his profile after the first login.

Access to the roles = selection of the user role. For more information, see *12.2 Roles*

Access rights = access level. Further information can be found below

Mobile Profile Pros = Detailed information about the "mobile profile" can be found under *7.6.4 Mobile* Profile Pro

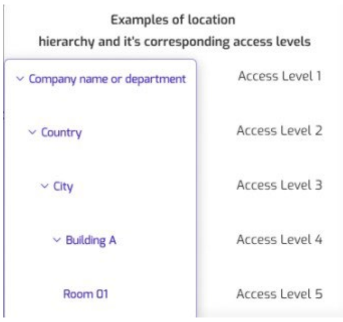


Fig. 240 Example: Location structure and corresponding access rights

Access rights are based on your location hierarchy.

The first level corresponds to your company, the other levels are built according to your location hierarchy: e.g. Level 1: Company Name, Level 2: Location, Level 3: Buildings, Level 4: Rooms.

12.1.5 12.1.2 Import and export of contacts

To efficiently manage several data records at the same time, use the **import and export functions**. These allow you to maintain and update lists of senders, recipients, and users in FP Trax.

12.1.5.1 12.1.2.1 Data import

To create contacts for the first time, click the **Import** button in the **Contacts** section to download a template. In the dialog that opens, you can choose between **.xlsx** or **.csv** format.

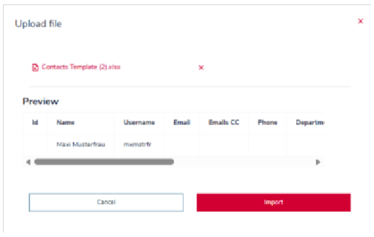
After entering or updating the data, upload the file by either **dragging and dropping** it into the upload area or by using the **file upload function** in your browser.

Note: If you want to update existing data in the system, please use a *Fig. 241 Data import* current data export. See also *12.1.2.2 Data export.*

	A	B	C	D	E	F	G	H	I	J	K	L	M
1	Id	Name	Username	Email	Emails CC	Phone	Department	Cost Center	Role	Access Level	External ID	Code	Location
2													

Fig. 242 Import file

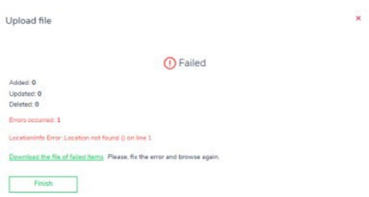
For the upload, please note the mandatory fields of senders, recipients and users. Cf. To this end, *12.1.1 Add contacts manually.* Please also note the descriptions of the individual columns in Register 2 of the document.



Before the final data import, you will be shown a preview of the data to be imported. Make sure that all records are correct, and then click Import.

To cancel the import, click the "Cancel" button.

Fig. 243 Data Import Preview



After the import is complete, a **summary of the results** will be displayed.

If the upload fails, an **error report** will show which records need to be corrected. After making the necessary changes, you can upload the file again.

Click **Finish** to complete the process. *Fig. 244 Error Analysis Import*

After a successful upload, a **confirmation message** is displayed. You can close this message once you have reviewed it.

Fig. 245 Successful import

12.1.5.2 12.1.2.2 Data export

Fig. 246 Import/Export

Use the **export function** to review and update multiple contact records at once. Click **Export**, select the desired format (**.xlsx** or **.csv**), and the file will be downloaded automatically to your device.

Modify records: Edit the data in the exported file and save your changes.

Delete records: To delete an existing record, enter **DELETE** (in uppercase) in the **Name** column. Once the file is uploaded again, the marked record will be removed from the system.

Add new records: To add new contacts, simply enter them in additional rows at the end of the file.

Note: Records without a system ID are treated as new entries and may be added as duplicates.

After completing all changes, upload the file again using the **import function** to apply the updates. (see section Cf. *12.1.2 Import and export of* contacts*)*

12.1.5.3 12.1.2.3 Bulk deletion

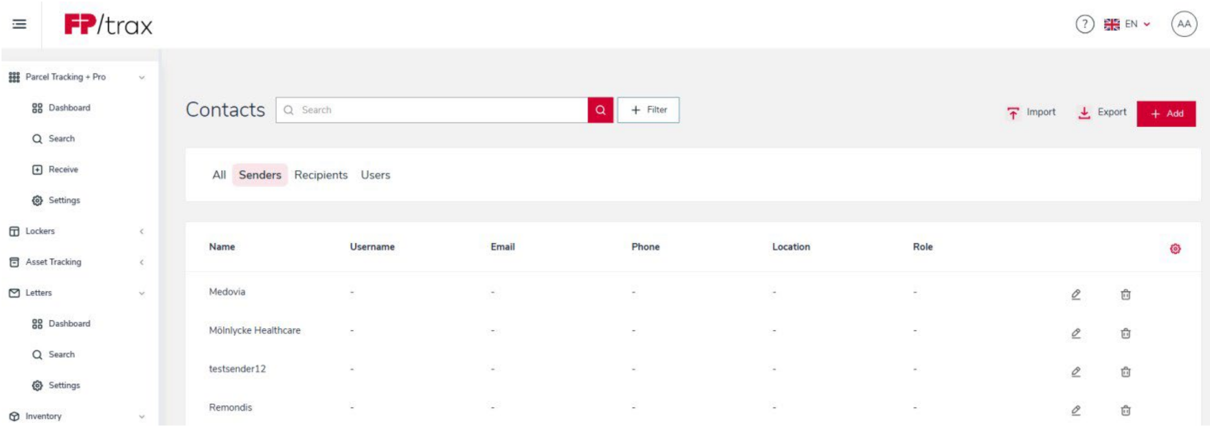
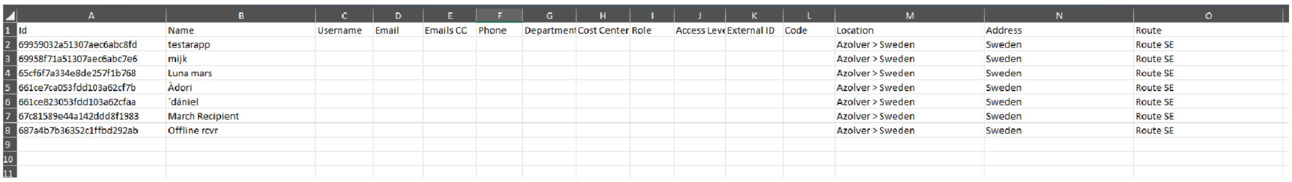


Fig. 247 Export Data

To delete multiple contacts at once, you can use the **export/import function**.

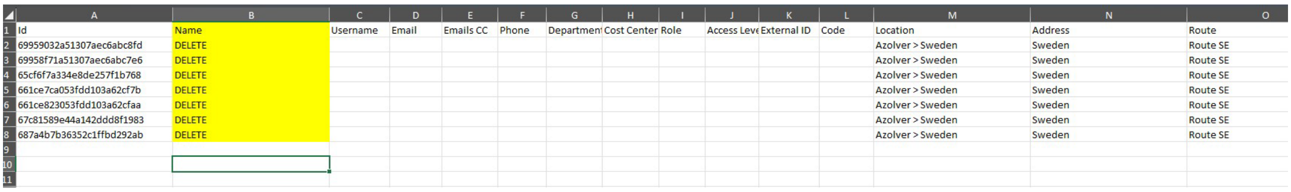
First, go to the **Contacts** page and filter the contacts you want to delete. You can use the **Sender**, **Recipient**, or **User** tabs, or apply additional filters to narrow down the selection. Click then **Export** button



Id	Name	Username	Email	Emails CC	Phone	Departmen	Cost Center	Role	Access Leve	External ID	Code	Location	Address	Route
69959032a51307aec6abc8fd	testarapp											Azolver > Sweden	Sweden	Route SE
69958f71a51307aec6abc7e6	mijk											Azolver > Sweden	Sweden	Route SE
65cf6f7a334e8de257f1b768	Luna mars											Azolver > Sweden	Sweden	Route SE
661ce7ca053fdd103a62cf7b	Àdori											Azolver > Sweden	Sweden	Route SE
661ce823053fdd103a62cfaa	´dániel											Azolver > Sweden	Sweden	Route SE
67c81589e44a142ddd8f1983	March Recipient											Azolver > Sweden	Sweden	Route SE
687a4b7b36352c1ffbd292ab	Offline rcvr											Azolver > Sweden	Sweden	Route SE

Fig. 248 Download Excelfile

Download the excel file, open it in edit mode.



Id	Name	Username	Email	Emails CC	Phone	Departmen	Cost Center	Role	Access Leve	External ID	Code	Location	Address	Route
69959032a51307aec6abc8fd	DELETE											Azolver > Sweden	Sweden	Route SE
69958f71a51307aec6abc7e6	DELETE											Azolver > Sweden	Sweden	Route SE
65cf6f7a334e8de257f1b768	DELETE											Azolver > Sweden	Sweden	Route SE
661ce7ca053fdd103a62cf7b	DELETE											Azolver > Sweden	Sweden	Route SE
661ce823053fdd103a62cfaa	DELETE											Azolver > Sweden	Sweden	Route SE
67c81589e44a142ddd8f1983	DELETE											Azolver > Sweden	Sweden	Route SE
687a4b7b36352c1ffbd292ab	DELETE											Azolver > Sweden	Sweden	Route SE

Fig. 249 change data

Replace Name column with DELETE command (capital letters), don’t change any other columns.

Save the file.

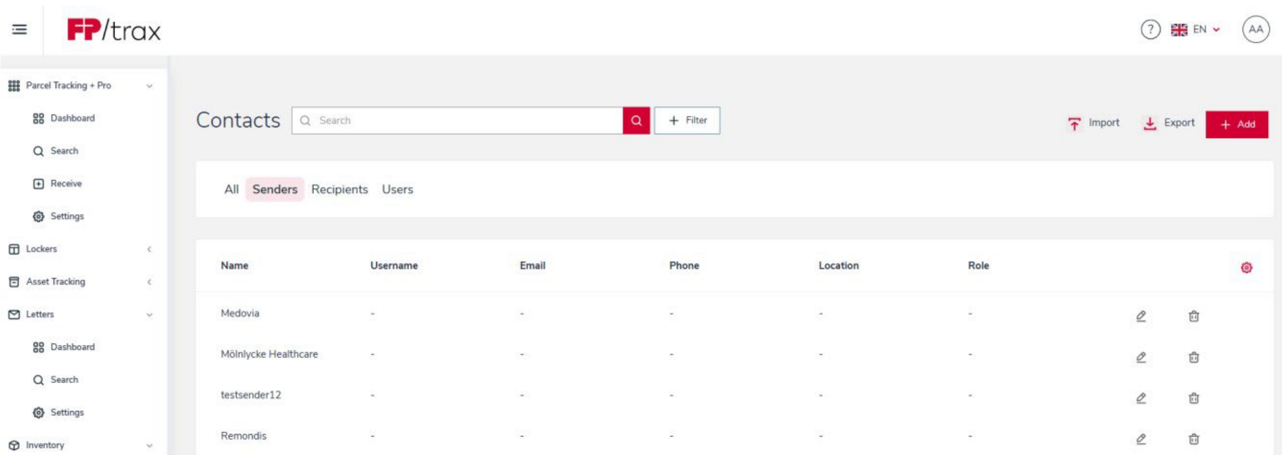
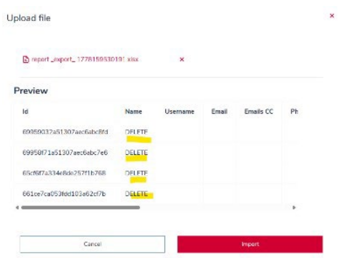


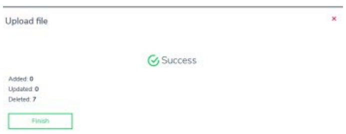
Fig. 250 Import

Go to the Contacts page and click the Import button. Drag and drop the file and import it again.



Click **Import** button.

Fig. 251 Import data



The summary of the file import is shown.

If there were errors, you will get an failed report to download and correct and import again.

Fig. 252 Import successful

12.212.2 Roles

When you first set up the system, two roles are already included:

12.2.1 • Administrator

Has full access to everything in the system.
This role cannot be changed or deleted.
Administrators can create new roles and assign them to users.

12.2.2 • Guest

A recipient who can log in and see their own parcels.
This role also cannot be changed or deleted.
Recipients without this role can still receive parcels, but they cannot log in or view their history.

- It is useful to create another **User** role for people who handle parcels:

User = person handling the Parcel. We recommend setting up at least the Parcel Tracking > Dashboard, Create Parcel, Parcel Search, Parcel Set Status, Parcel Archive Search, and Edit Parcel permissions for this role.

Only **one role** can be assigned to each user.

If a user needs permissions from multiple roles, you must **create a new role** that includes all required permissions and assign this role to the user.

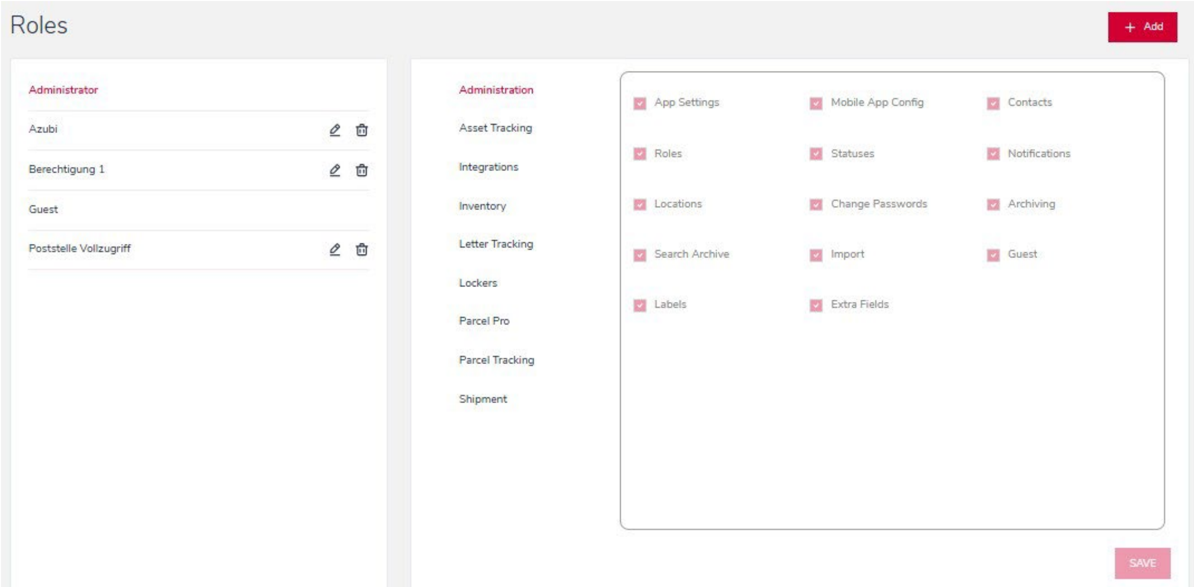


Fig. 253 Role assignment to module and function

12.2.3 12.2.1 Create, edit, and delete roles

To create a new role, click on the "Add" button and assign a unique role name. Then click on the "create" button. The role is created and listed in the list of roles.

Fig. 254 New role > Role designation

To edit or delete a role, click the Edit or Delete icon in the row of the role listing.

Fig. 255 Edit and delete roles >

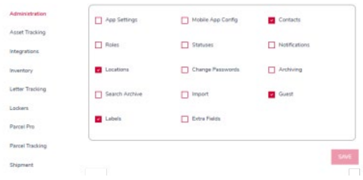


Fig. 256 Authorization assignment at module level

To edit a role, click the **pencil icon** next to the role you want to change.

Select the area (for example, **Administration** or **Asset Tracking**) where you want to adjust permissions. Then choose which permissions should be active by **checking or unchecking the boxes**.

12.2.4 12.2.2 Roles and permissions

The following **permissions** can be assigned across the entire **FP Trax system**.

12.2.4.1 12.2.2.1 Administration

- App settings: allowed to access > settings in the FP Trax app
- Mobile App Configuration: FP Trax App > Settings > App Config is selectable and manageable
- Contacts: the menu item Administration > Contacts is displayed and can be managed. In addition, the contact authorization for the parcel tracking function is mandatory in order to be able to manage parcels
- Roles: the menu item Administration > Roles is displayed and can be managed
- Status: the menu item Parcel Tracking (Pro) > Settings > Status is displayed and can be managed
- Notifications: the menu item Parcel Tracking (Pro)/Assets/Letters > Settings > Notifications is displayed and can be managed
- Locations: the menu item Administration > Locations is displayed and can be managed. In addition, the location authorization for the parcel tracking function is mandatory in order to be able to manage parcels
- Change passwords: The role is able to assign/change passwords for users
- Archiving: the menu item Administration > Archiving is displayed and can be managed
- Search Archive: you can search in the archive
- Import: Authorized to use the import functions
- Guest: this role is a Parcel recipient who can log in to the web app (with Azure SSO) and view the list of his Parcels there
- Labels: the menu item Administration > Labels is displayed and can be managed
- Additional fields: the menu item Parcel Tracking (Pro) > Settings > additional fields is displayed and can be managed

12.2.4.2 12.2.2.2 Asset Tracking

- Dashboard: the menu item Asset Tracking > Dashboard is displayed and can be used
- Search for Assets: the menu item Asset tracking > Search is displayed and can be used
- Create Assets: Authorised to create new Assets
- Update Asset status: Authorized to change the status of created Assets (e.g. lend)
- Edit Asset: Authorised to edit the data of created Assets
- Delete Assets: entitled to delete created Assets
- Categories and types: Authorized to manage item categories and types

12.2.4.3 12.2.2.3 Letter tracking

- Dashboard: the menu item Letters > Dashboard is displayed and can be used
- Notify: entitled to use the FP Trax App > Modules > Post (inform recipients of letters ready for collection)
- Search Letters: the menu item Letters > Search is displayed and can be used

12.2.2.4 Parcel Pro

- Mobile Profiles: authorized to manage and use Mobile Profiles

12.2.4.4 12.2.2.5 Parcel tracking

- Dashboard: the menu item Parcel Tracking (Pro) > Dashboard is displayed and can be used
- Parcel search: the menu item Parcel Tracking (Pro) > Search is displayed and can be used
- Parcel settings: the menu item Parcel Tracking (Pro) > Settings is displayed and can be managed
- Create Parcel: Authorized to Capture Parcels
- Update Parcel Status: Authorized to change the status of created Parcels (e.g. swap)
- Edit Parcel: Authorized to edit the data of created Parcels
- Delete Parcel: Authorized to delete created Parcels
- Schedule reports: Authorized to generate automated Parcel reports on a daily basis
- Parcel types: the menu item Parcel Tracking (Pro) > Settings > Parcel types is displayed and can be managed
- Logistician: the menu item Parcel Tracking (Pro) > Settings > Logistician is displayed and can be managed

12.2.4.5 12.2.2.6 Lockers

- Dashboard: the menu item Lockers > Dashboard is displayed and can be used
- Locker settings: the menu item Lockers > Settings is displayed and can be managed
- Open lockers: authorized to open lockers

12.2.4.6 12.2.2.7 Shipment bundling

- Create a shipment: Authorized to create shipments/shipments
- Update Shipment Status: Authorized to update the status of Parcel shipments

12.312.3 Locations

You can manage all delivery locations for shipments and items. Locations can be created individually or added in bulk using a file import.

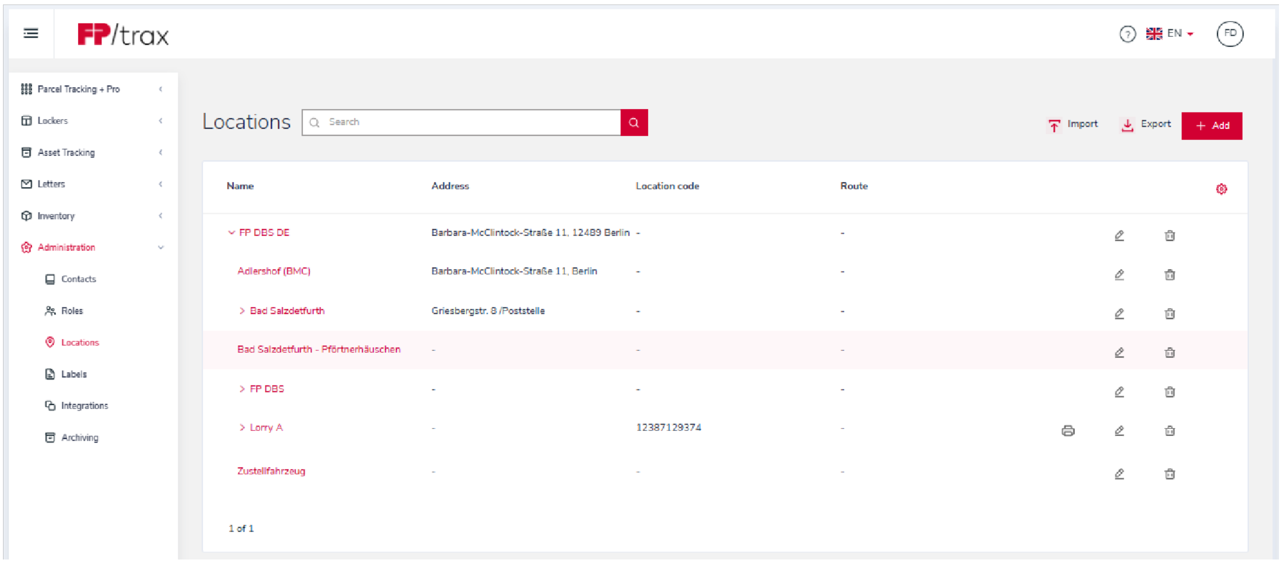
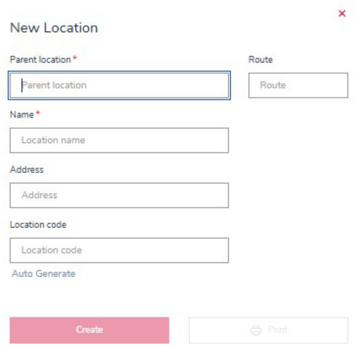


Fig. 257 Overview Locations

To add a location manually, click on the "Add" button.



To create a new location, first select the **parent location** under which it should be created. To do this, enter the first few letters of the location name and choose it from the list that appears.

Next, enter a **name** for the new location and provide additional details in the **Address** field.

If you want to create a **scannable label** for the location, assign a unique **Location Code**.

You can optionally assign a **fixed route** to the location.

Fig. 258 Add location manually

To import a list of locations, click the **Import** button. For the initial import, you can download a **blank template**, fill it with your data, and upload it by **drag and drop**. Alternatively, you can use the **Browse** function to select the file from your device.

Note: If you want to update an existing location structure, use a **current data export**. Changes made in a file without the unique **system ID** will not update existing records—instead, new locations will be created. Cf. *12.1.2 Import and export of contacts*.

12.412.4 Labels

FP Trax uses three types of labels:

- **Parcel labels** – used for shipment tracking
- **Location labels** – used to identify specific locations
- **Item labels** – used for asset tracking

You can choose between a **2D barcode** or a **QR code**.
If you would like to switch between these options, please contact your **sales representative**.

12.4.1 12.4.1 Parcel label

Differentiation between the recording of a shipment or several shipments created as part of a shipment bundling (see section *7.4.3*)

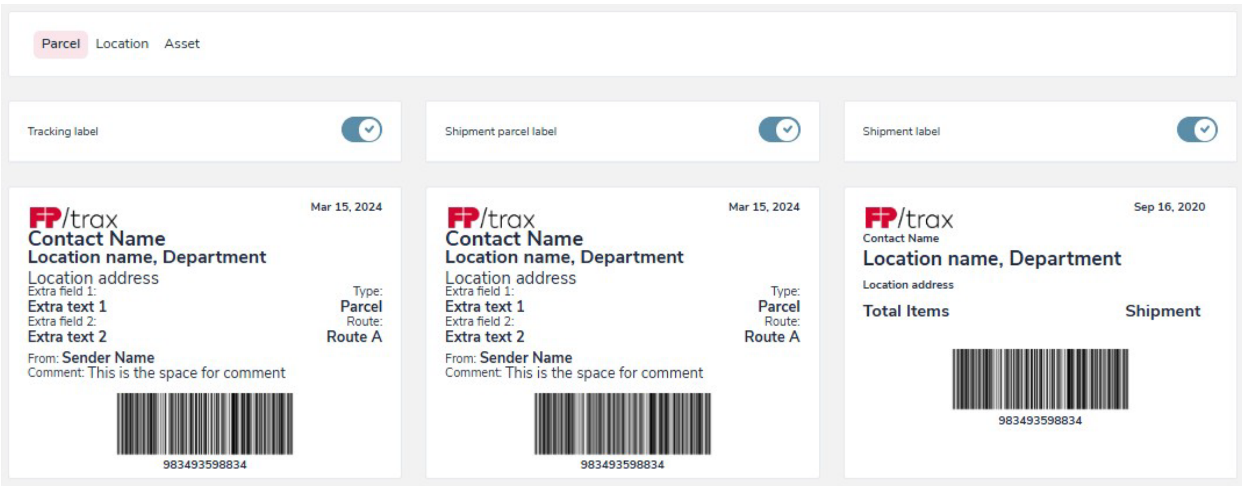


Fig. 259 Overview of parcel labels

12.4.1.1 12.4.1.1 Single shipment tracking label

Use the toggle function to configure whether or not to print a label for the unique identification of the shipment when capturing a single shipment. By setting up the individual fields (cf. 7.6.3 *Extra fields)* the content of the label is expanded to include these.

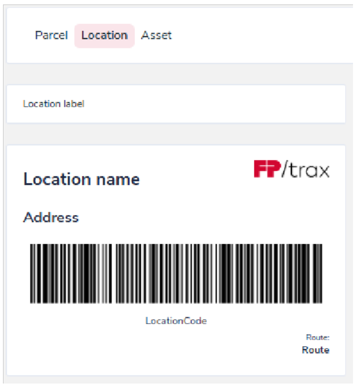
12.4.1.2 12.4.1.2 Tracking label for each parcel of a shipment (parcel label for shipping)

Use the toggle function to configure whether or not a label should be printed for the unique identification of each captured shipment during parcel capture as part of a shipment bundling.

12.4.1.3 12.4.1.3 Shipment Bundling Label (Shipping Label)

Use the toggle function to configure whether or not to print a label to uniquely identify the entire shipment when entering a shipment. With the help of this label, the parcels of the entire shipment can be processed at the same time.

12.4.2 12.4.2 Location label



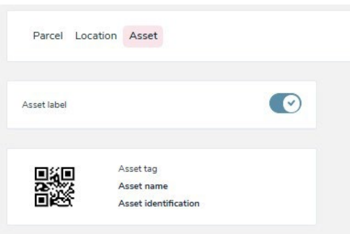
A **location label** contains the location's **name**, **address**, **location ID**, and **route**.

If deliveries or storage are carried out at a specific location, the person responsible can scan the **location ID** to confirm the delivery.

To print a location label, go to **Administration › Locations**. Once a **location code** has been assigned, a **print icon** appears next to the location. Click the **print icon** to generate and print the label.

Fig. 260 Location label

12.4.3 12.4.3 Asset label



Use the **toggle option** to decide whether a label should be created and printed during item creation. This label allows the item to be uniquely identified.

The **asset label** includes a **QR code**, the **asset number**, the **designation (name)**, and, if provided, the **identification details** entered during registration.

Fig. 261 Asset label

12.512.5 Integrations

In the **Integrations** section, you can use **automated data import** to maintain your contact and/or parcel data at regular intervals.

You can also automatically synchronize your contacts in FP Trax with your **Entra ID** data on a regular basis.

12.5.1 12.5.1 Data Import

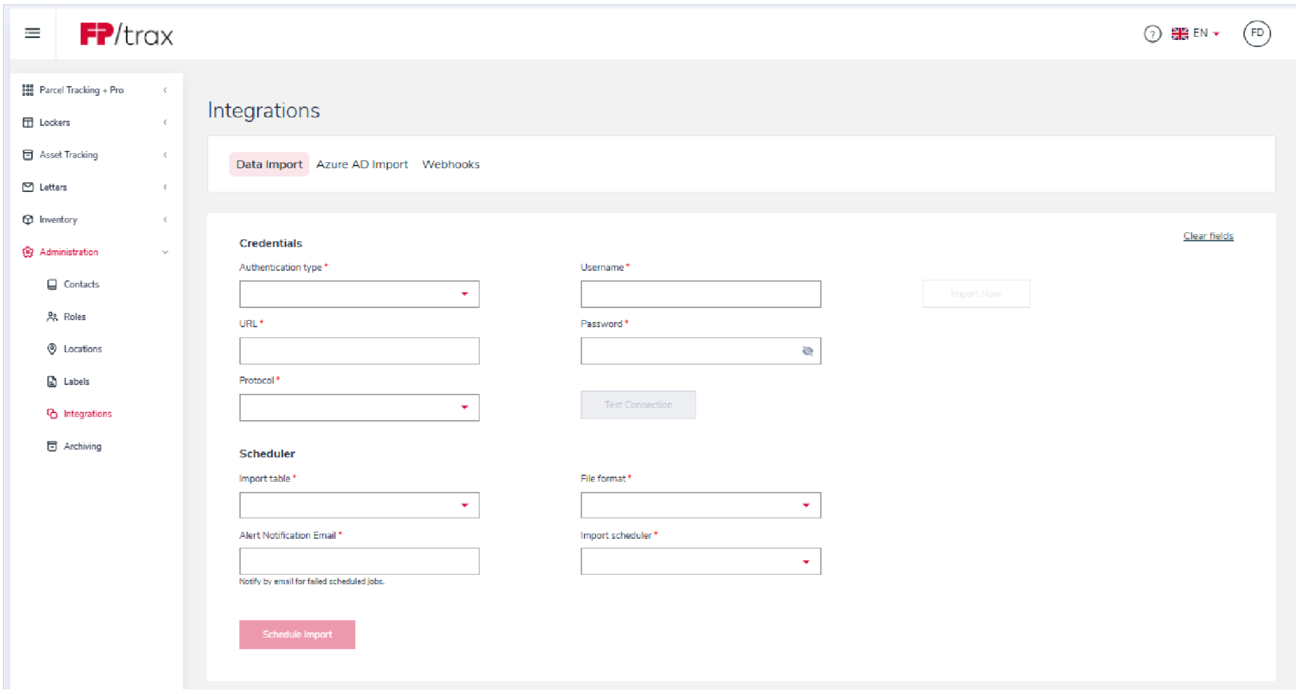


Fig. 262 Integrations > Data Import

With automated data import, you can regularly import and update **contact** or **parcel data** in the FP Trax system.

Enter the required connection details:

- **Authentication Type** – Select the appropriate option from the drop-down menu
- **Username** – Enter your username
- **Password** – Enter your password
- **URL** – Enter the location from which the file will be retrieved
- **Log Type** – Select the desired log type from the drop-down list

After entering the details, click **Test connection** to verify access.

Configure the import settings:

- **Import Table** – Select what type of data you want to import
- **File Format** – Choose the file format (**.xlsx** or **.csv**)
- **Notification Email** – Enter an email address to receive alerts if the import fails
- **Import Schedule** – Define how often the data should be imported

Once all settings are configured, click **Import schedule** to save the automatic import. The configured import will appear on the right side of the screen, where it can be viewed and edited.

To delete an import, click the **trash can icon**.

If you want to start the import immediately, click **Import now** in the upper-right corner.

If you have any further questions, please contact your **IT department or FP Trax support** support@traxsuite.com

12.5.2 12.5.2 Azure AD/Entra ID Import

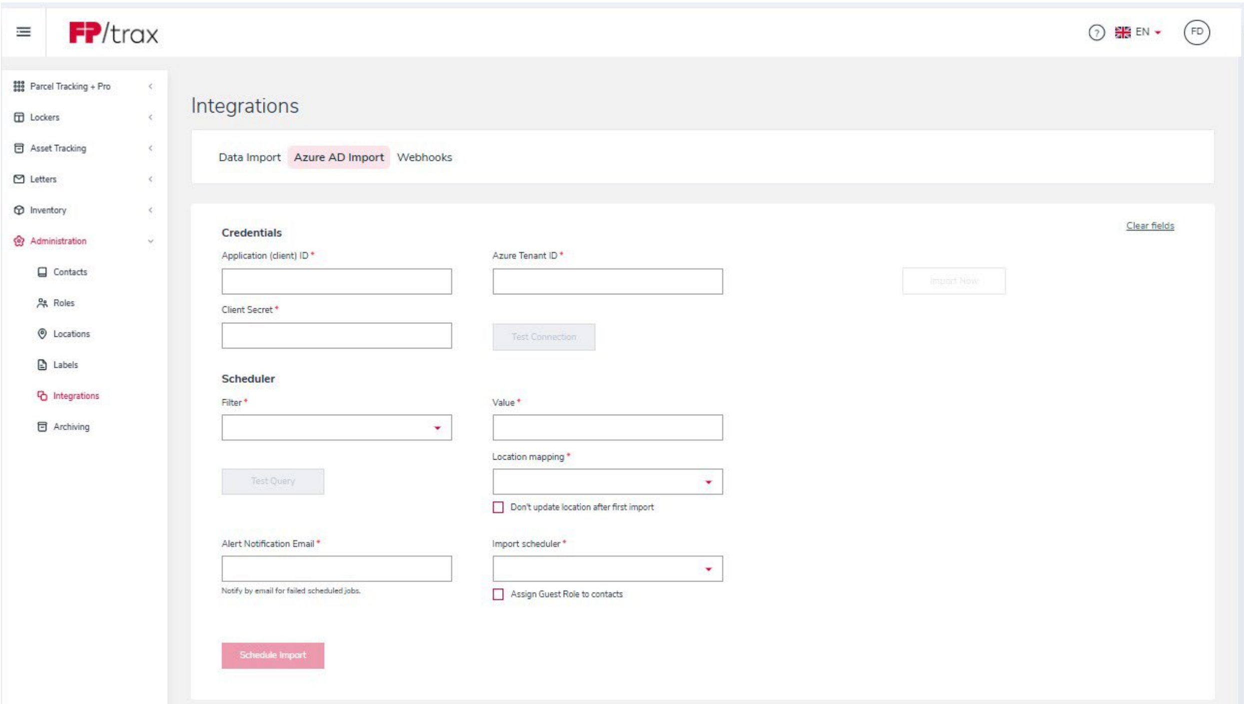


Fig. 263 Integrations> Entra ID Import

To set up the **Entra ID import**, enter the following information:

- **Application ID** – The ID of your Azure application (requires *read all users* permission)
- **Azure ID** – Your Microsoft Azure user ID
- **Client ID / Password** – The credentials for your Azure application

After entering these details, click **Test connection** to verify access.

Import configuration:

- **Filters** – Set filters to limit which users are imported (optional)
- **Test query** – Check how many users will be imported with your current filter settings
- **Location assignment** – Locations are automatically created based on your Entra ID data

12.5.2.1 - Do not update location after first import

When enabled, location changes in Entra ID will not overwrite any manual changes made in FP Trax

- **Notification email** – Enter an email address to receive alerts if the import fails
- **Import schedule** – Choose how often the synchronization should run
- **Assign Guest role** – Automatically assigns the **Guest** role to imported recipient contacts (Cf. *12.2.2 Roles and permissions)*

After entering all required details, click **Import schedule** to save the recurring import.

Once the setup is complete, it will appear on the **right side of the screen**. You can click an entry in the list to **view and edit** its settings.

To remove an import, click the **trash can icon** next to it.

Click **Import now** in the upper-right corner to run the import directly.

If you have any further questions, please contact your **IT department or FP Trax support** support@traxsuite.com

12.5.3 12.5.3 Webhooks

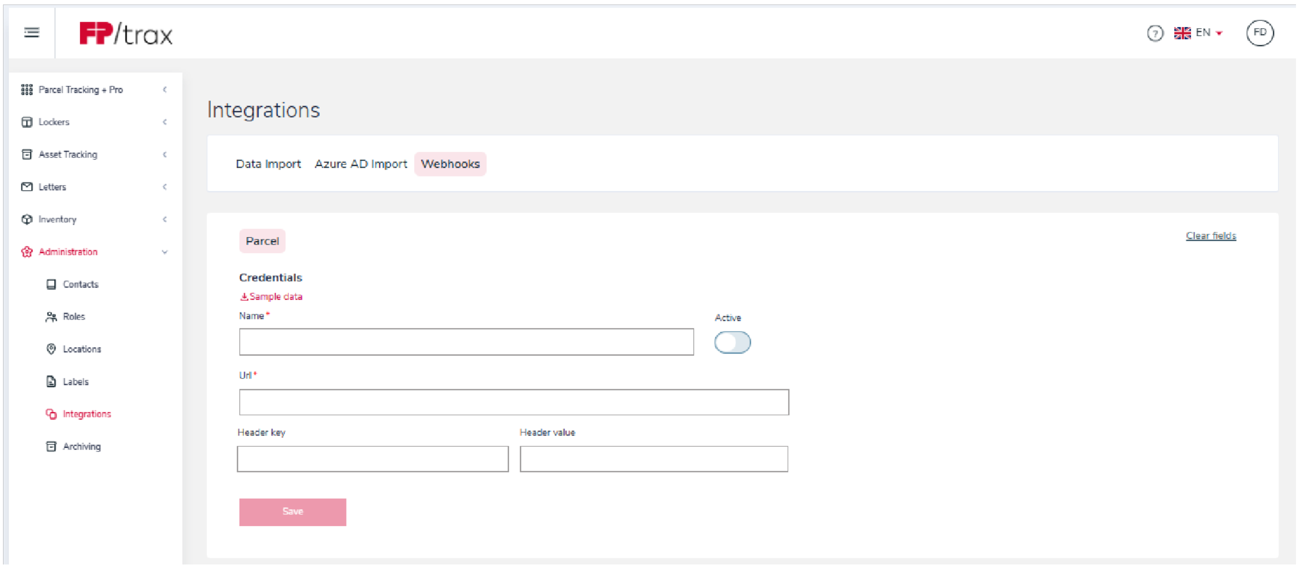


Fig. 264 Integrations > Webhooks > Parcel

A **webhook** is an automated mechanism that sends data from one application to another whenever a specific event occurs.

In FP Trax, this means that **parcel data is automatically sent to a defined URL in real time** whenever changes occur, for example, when the **parcel status is updated**.

If you have any further questions, please contact your **IT department or FP Trax support** support@traxsuite.com.

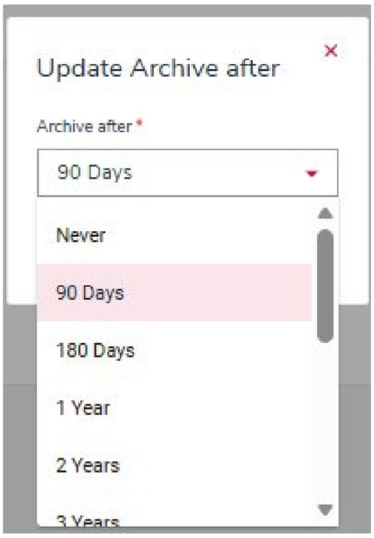
12.612.6 Archiving

The **archiving function** is available for both **parcels** and **asset tracking**.

It includes two actions:

- Moving a parcel or asset transaction to the **archive**
- **Permanently deleting** a parcel or asset transaction from the archive

By default, this function is **disabled** (set to **Never**).



Click the **pencil icon** to edit the settings, then choose the desired archiving and deletion intervals from the drop-down menu.

Fig. 265 Setting an Archiving Period

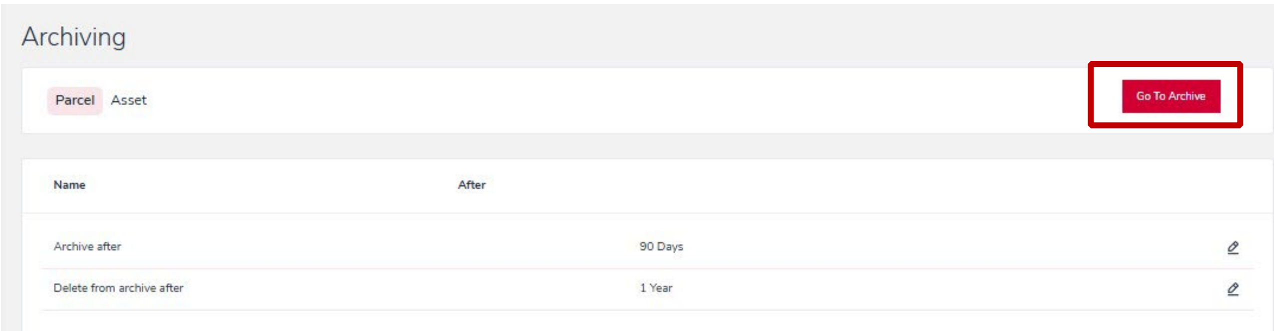


Fig. 266 Archiving

To view the archived data, click on the "Go to archive" button in the upper right corner.

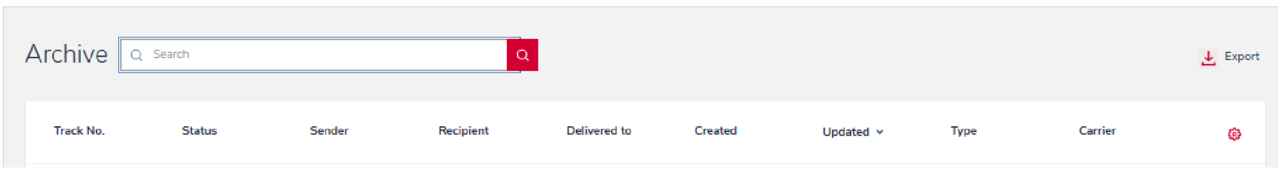


Fig. 267 Filter Archive

Use the parcel archive to search by tracking number or filter by date, sender, recipient, or status. The asset archive offers similar search options for locating specific transactions.

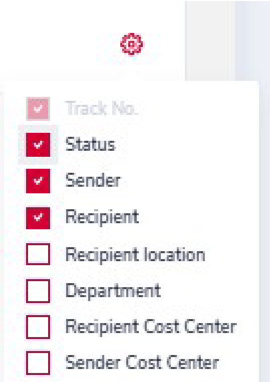


Fig. 268 Selection criteria for the overview

Use the **gear icon** to customize the columns in the archive overview.

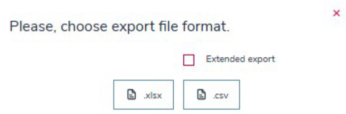


Fig. 269 Export archive file

To export data from the archive, click the **Export** button.

For an extended export, you can include the **comments** related to each record. To do this, activate the corresponding **checkbox** before exporting the file.

In the dialog box, select the desired file format (**.xlsx** or **.csv**) to start the export. The file will then be automatically downloaded to your device.