

# User Guide

FP Trax

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## 1 Welcome

**Dear Customer,**

Thank you for choosing **FP Trax** – we truly appreciate your trust in our product.

With FP Trax, you benefit from a solution that enhances your workflows by increasing efficiency, providing greater transparency, and enabling reliable tracking of parcels and assets such as technical equipment. This helps reduce losses, save valuable time, and ultimately lower operational costs.

This document provides you with a comprehensive overview of FP Trax, including its key features, areas of application, and instructions for use.

We wish you great success with FP Trax. If you have any questions, please feel free to contact us via email at [support@traxsuite.com](mailto:support@traxsuite.com)

**Kind regards,  
Your FP Trax Team**

## 2 Support

**Your FP Trax Team:**

E-Mail: [support@traxsuite.com](mailto:support@traxsuite.com)

Web: <https://helpcenter-trax.fp-dbs.com/en/support/home>

### 3 General information about FP Trax

FP Trax is a cloud-based tracking solution that requires no local installation. It helps you manage parcels, letters, and delivery documents, and assets. The system is modular and can be customized to your needs. An overview of all modules is provided below in the section *3.1 FP Trax Features and Modules*.

FP Trax can be used via a web browser or as a mobile app (Android and iOS), including offline functionality.

This guide describes all features of the solution, although the functions available to you may vary based on your setup.

#### 3.1 FP Trax Features and Modules

Here is an overview of the features included in the 'Parcel Tracking', 'Parcel Tracking Pro', 'Asset Tracking', 'Letters' and 'Inventory' modules

Features	Modules				
	Asset	Parcel	Parcel Pro	Letters	Inventory
<b>Administration</b> <ul style="list-style-type: none"> <li>Manual creation/import/export of contacts (senders, recipients, users) and location hierarchies</li> <li>Create and assign roles and access levels</li> <li>Create custom labels (Parcels, items, and locations)</li> <li>Archiving of data</li> </ul>	X	X	X	X	X
<b>Shipment management (business and private shipments)</b> <ul style="list-style-type: none"> <li>Reception, processing, delivery</li> <li>Proof via: Photo/digital signatures</li> <li>Audit-proof delivery note documentation</li> <li>Damage logging</li> <li>Search, shipment details, shipment history, reports, dashboard</li> <li>Individual management of shipment types, logisticians, additional fields, mobile profiles <sup>Pro</sup>, status, notifications and reminders</li> </ul>	-	X	X	-	-

<p>Asset management</p> <ul style="list-style-type: none"> <li>• Manual creation/import/export of Assets</li> <li>• Assigning/Editing Assets</li> <li>• Search, Item Details and Item History, Dashboard</li> <li>• Categorization/Typing, Status, Notifications and Reminders</li> </ul>	X	-	-	-	-
<p>Letters</p> <ul style="list-style-type: none"> <li>• Notifications</li> </ul>	-	-	-	X	-
<p>Recipient account (guest)</p> <ul style="list-style-type: none"> <li>• Overview of your own shipments incl. detailed view</li> <li>• Management of your own profile and delivery data</li> </ul>	-	X	X	-	-
<p>Parcel bundling</p> <ul style="list-style-type: none"> <li>• Bundling several parcels into one delivery</li> <li>• Processing multiple Parcels at the same time</li> <li>• an email notification for multiple Parcels</li> <li>• Provision of multiple parcels in one locker</li> </ul>	-	-	X	-	-
<p>Mobile Profile</p> <ul style="list-style-type: none"> <li>• Create and assign dynamic Parcel filters for app users</li> <li>• Processing of all Parcels with mobile profiles</li> </ul>	-	-	X	-	-
<p>Automated reports</p> <ul style="list-style-type: none"> <li>• Setting up and sending automatic reports</li> </ul>	-	-	X	-	-
<p>Locker solutions</p> <ul style="list-style-type: none"> <li>• Delivery and collection of parcels to/from parcel Locker</li> <li>• Manage notifications and reminders</li> <li>• Control of parcel compartment availability per parcel locker size</li> <li>• Dashboard</li> </ul>	-	X	X	-	-

Automated import <ul style="list-style-type: none"> <li>• Automatic data import of expected Parcels (simplified Parcel capture)</li> <li>• Automated synchronization of contacts with Entra ID including single sign-on. (No manual user management required)</li> </ul>	-	-	X	-	-
Inventory overview <ul style="list-style-type: none"> <li>• Clear warehouse management according to the Kanban principle</li> <li>• Manual creation/import/export of holdings</li> <li>• Intuitive assignment/editing of stocks</li> <li>• Search, inventory details and history</li> <li>• Colour marking when the minimum stock level is reached</li> </ul>	-	-	-	-	X

*Table 1 Product Shipment Overview*

## 3.2 System Requirements and Hardware Components

### 3.2.1 Web application

To use the **FP Trax web platform**, a stable internet connection is required. We recommend using the **latest version** of a modern web browser.

For optimal operation, your computer should have at least **two USB ports** to connect a printer and a (wireless) handheld scanner.

### 3.2.2 FP Trax Mobile App

The **FP Trax mobile app** is available for both **Android** and **iOS** devices and can be downloaded from the respective app stores.

The app can be used **online or offline**, but an internet connection is required periodically to **synchronize data**.

Minimum system requirements:

- **Android:** Version 7.1.2 (Nougat) or higher
- **iOS:** Version 11.0 or higher

We recommend always using the **latest available operating system** and the **latest FP Trax mobile app version**.

### 3.2.3 Printers

For reliable label printing, we recommend the **Zebra ZD421 label printer**, which can be connected via **Wi-Fi or Ethernet**.

Alternatively, other standard printers can also be used. For setup instructions, see section *4.2 Printer Setup*.

### 3.2.4 Labels

If you use the recommended printer, we suggest using **self-adhesive thermal labels (101.6 × 76.2 mm)**. Using **colored labels** (e.g. yellow) can help distinguish FP Trax labels from other labels on shipments.

### 3.2.5 Locker Systems

Optional **locker systems** are available for **24/7 parcel handling**.

For more information, please contact the **FP Trax team**.

## 4 Setting up the FP Trax environment

After your onboarding, the **FP Trax team** has already entered your company data into the system and created **administrator access** for you.

With this access, you can configure the FP Trax environment according to your needs and make the most of the system. If preferred, you can also complete the setup together with the FP Trax team as part of your onboarding session.

To get started, please follow the steps below in the order listed:

### 4.1 Setting up the Parcel/Asset/Letters management

- 1) Initial registration in section *5.1 Login*
- 2) Setting up roles in section *12.2 Roles*
- 3) (optional) Setting up the printer in section *4.2 Printer Setup*
- 4) (optional) Setting up labels in section *12.4 Labels*
- 5) Setting up the locations in section *12.3 Locations*
- 6) Setting up archiving in section *12.6 Archiving*
- 7) Setting up parcel tracking settings in section *7.6 Settings*
- 8) (optional) Setting up the scheduled import *12.5 Integrations*
- 9) Adding Contacts to Section *12.1 Contacts*
- 10) Assignment of different roles to users in section *Add contacts manually Users*

### 4.2 Printer Setup

The use of a printer is **not required** for every module or configuration. If you are unsure whether a printer is needed for your setup, please contact us.

For label printing, we recommend using the **Zebra ZD421 label printer** in combination with the FP Trax application.

For more information about compatible labels, see the section *3.2.4 Labels*.

#### 4.2.1 USB Print

Note: to install the printer drivers on the computer, requires administration rights

- 1) Download and install a Zebra ZD421 printer driver from [Zebra's website](#).

2) Choose USB-Port as a connection method

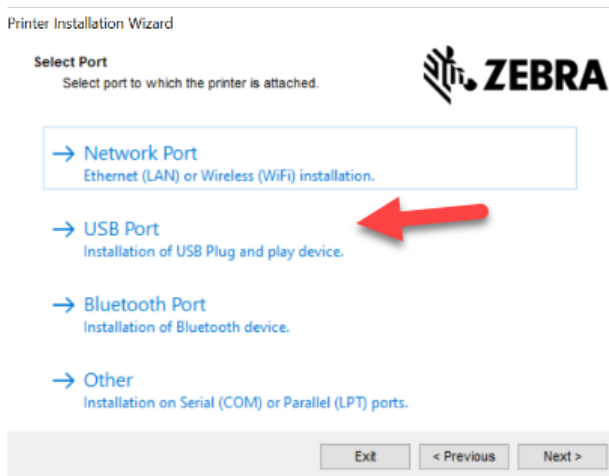


Fig. 1 USB-port

3) Continue and click Next till the end.

4) Configure **Printer settings:**

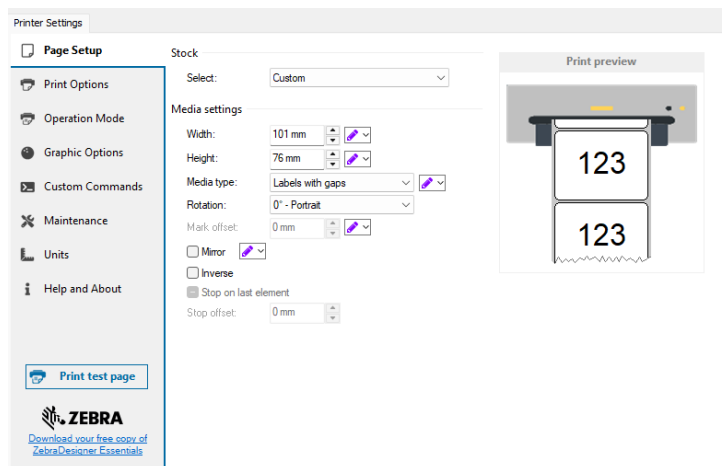


Fig. 2 Zebra ZD421 Page setup

**Set Width:** 101mm (4 inch)  
**Set Height:** 76mm (3 inch)  
**Choose media type:** Labels with gaps (change if you have continuous labels)

Change **Graphic Options:**

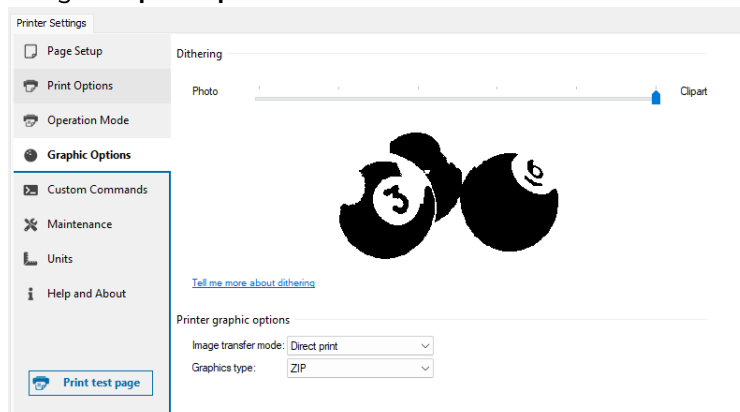


Fig. 3 Zebra ZD421 Graphic Options

Move the slider to the **Clipart**

### 4.2.2 Wi-Fi Print

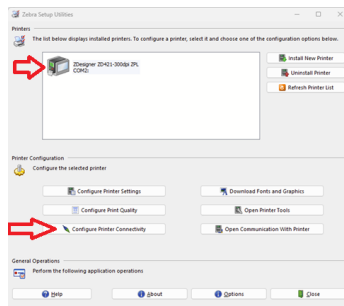
Enclosed is a guide on how to set up the above printer using **Wi-Fi Print** functionality from the mobile app

- 1) Download and install the "Zebra Setup Utilities" program on your computer. The .exe file can be found under the following link on the Zebra manufacturer page:

[Zebra Printer Setup|Zebra](#)

- 2) Connect the printer to your computer using a USB cable (included) and start the setup program.

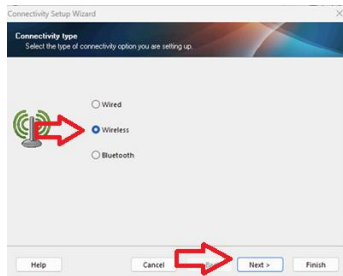
3)



Select the printer and then click on "Configure Printer Connectivity"

Fig. 4 Printers Facility 1

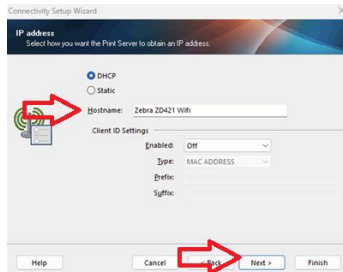
4)



Select "Wireless" and click "Next >"

Fig. 5 Printer Setup 2

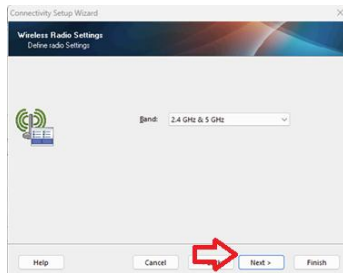
5)



Set a hostname = printer name (e.g. FP Trax printer) and then click on "Next >"

Fig. 6 Printers Setup 3

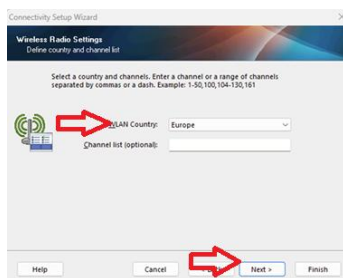
6)



Keep the default setting and then click on "Next >"

*Fig. 7 Printer Setup 4*

7)



Select "Europe" and click on "Next >"

*Fig. 8 Printer Setup 5*

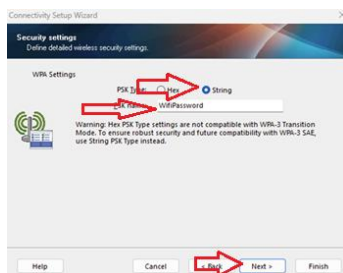
8)



Enter your Wi-Fi SSID (name of your Wi-Fi network), select the security mode and click on "Next >"

*Fig. 9 Printer Setup 6*

9)



Select "String", enter the Wi-Fi password and click on "Next >"

*Fig. 10 Printer Setup 7*

10)

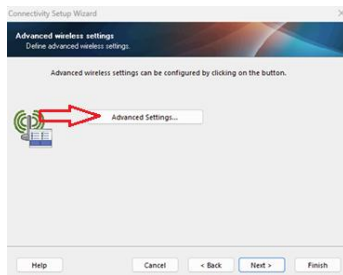


Fig. 11 Printer Setup 8

Click on "Advanced Settings"

11)

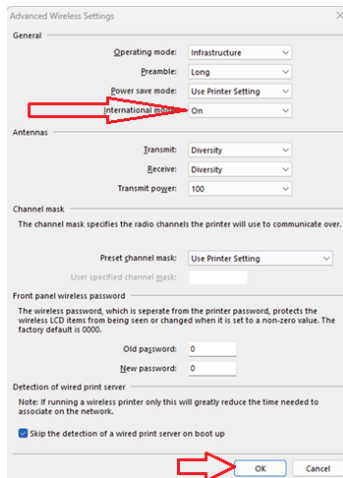


Fig. 12 Printer Setup 9

Select "on" from the "International Mode" drop-down menu and click "OK". Then click on "Next >"

12)

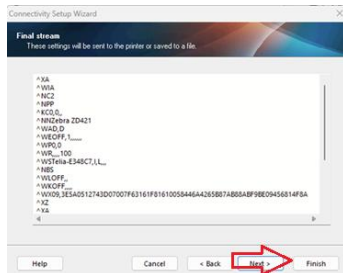


Fig. 13 Printer Setup 10

Click "Finish" to send the settings to the printer. This will restart and the network icon on the printer should then glow green. This will turn off when the printer enters sleep mode, but it should turn green again as soon as you press the power button once.

13)

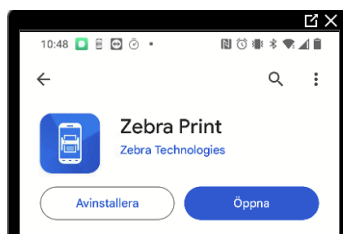


Fig. 14 Printer Setup 11

Install the "Zebra Print" app on your mobile device.

You can find the app either on Zebra's website:

<https://www.zebra.com/us/en/support-downloads/software/printer-software/zebra-print.html>

or download it directly from the Google Play Store or App Store.

14)

In the Printers section, click the plus sign to add a printer.



Fig. 15 Printer Setup 12

15)

Select "Wi-Fi and Ethernet Network"

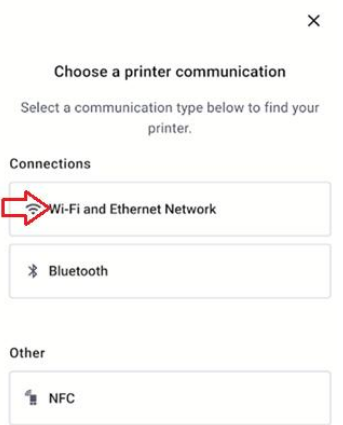


Fig. 16 Printer Setup 13

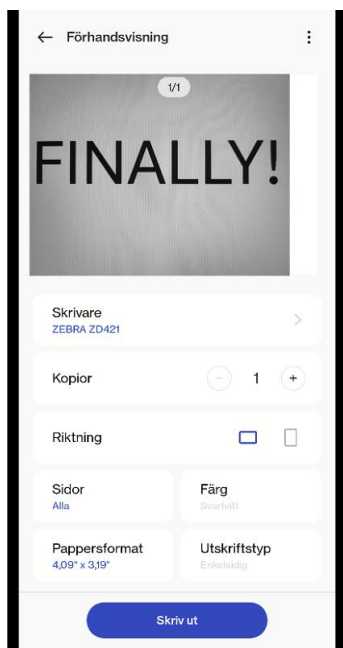
16)



Select your printer and click Save in Settings

Fig. 17 Printer Setup 14

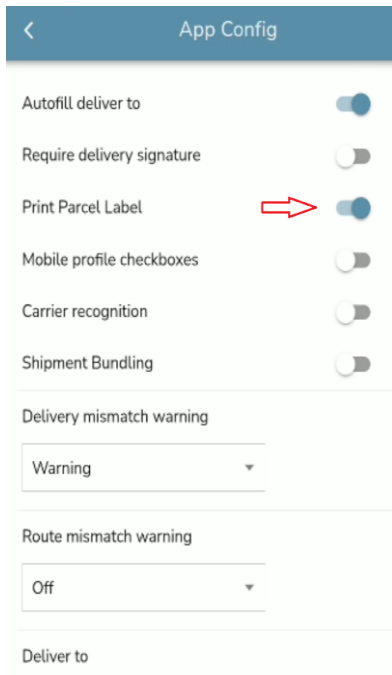
17)



As soon as you want to print something with the mobile device, it can now be selected.

Fig. 18 Printer Setup 15

18)



Log in to the FP Trax Mobile app.

On the home screen, click on the menu (the three horizontal bars) in the top left. Then click on Settings, then on App Config and activate the Print parcel label slider.

**Note:** If the "App Config" function is grayed out, please check your rights (cf. *12.2.2 Roles and permissions*)

**Note 2:** Make the configuration on each endpoint for each user using that device.

Fig. 19 Printer Setup 16

## 5 How to use FP Trax

### 5.1 Login

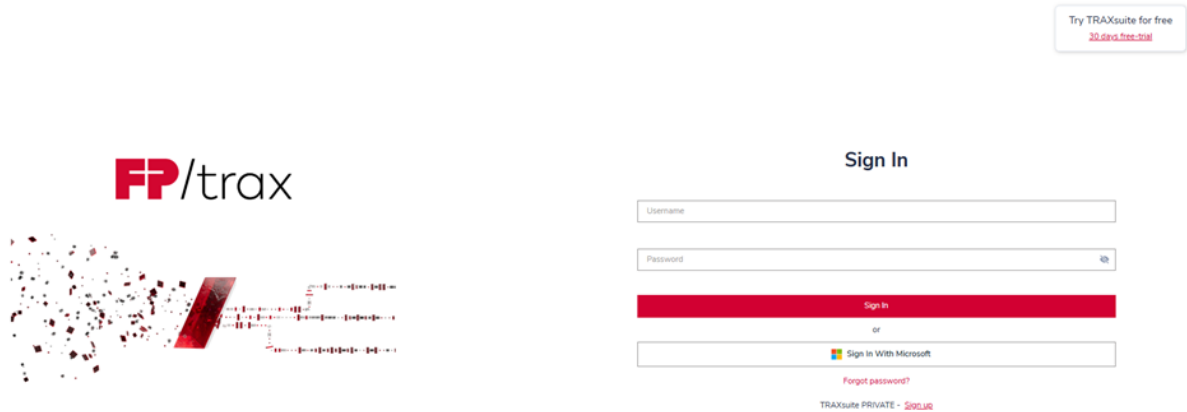


Fig. 20 Login screen

Once your order has been received and the system has been set up, you will receive your **personal administrator login** for your customer account. This allows you to access **FP Trax** via the link below and start using the system immediately:

<https://app.traxsuite.com/de/auth/login>

Use the "Forgot password" function to assign your own password for the first time.

### 5.2 FP Trax Dashboard

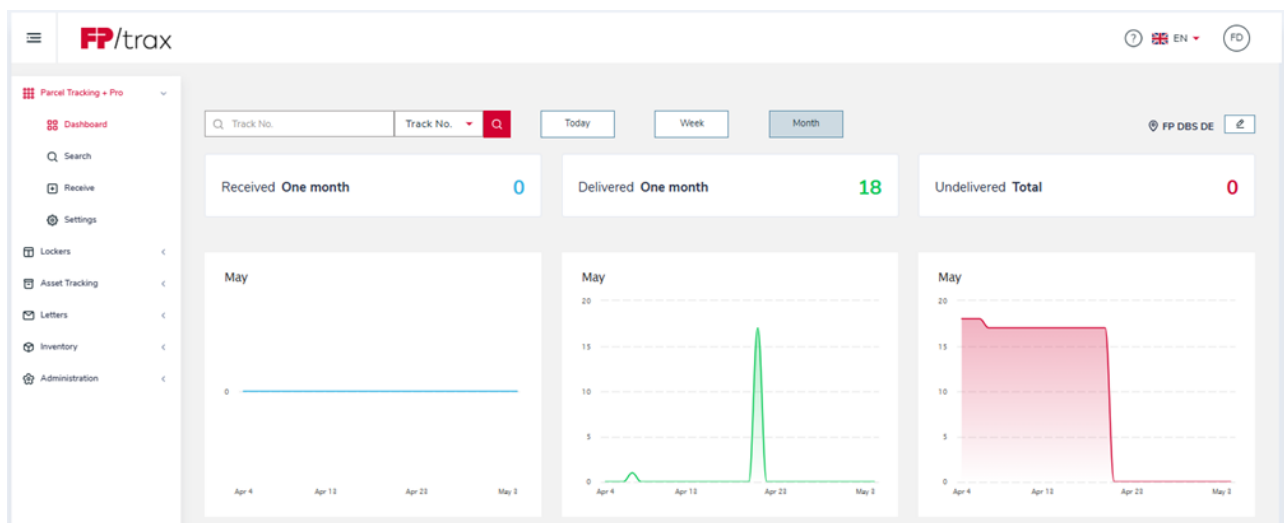
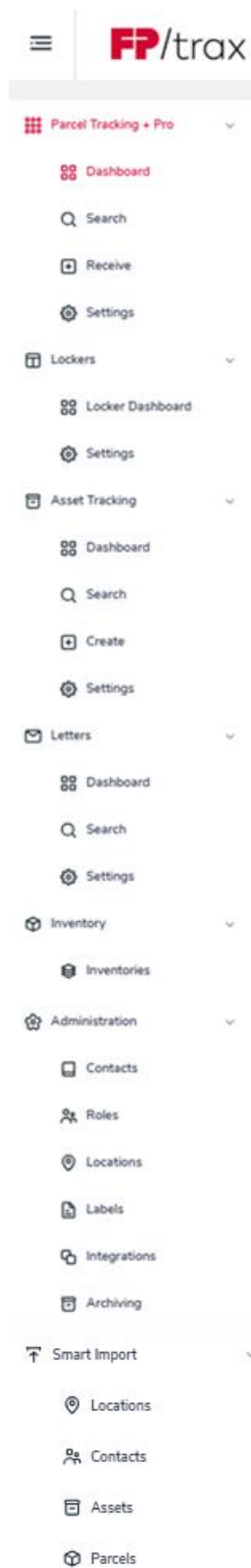


Fig. 21 Home screen

After logging in, you will be taken to the **home screen**. Depending on your permissions, different content will be displayed in the main area, along with a customized navigation menu on the left.

This manual describes all modules of the **FP Trax solution**. As a result, some views shown here may differ from those in your actual account.

### **5.2.1 The main navigation on the left pane**



On the left side, you will find the **main navigation menu**, which includes the modules available in your FP Trax setup.

- The top menu item provides access to **Parcel Tracking** or **Parcel Tracking Pro**.  
The submenu items **Dashboard**, **Search**, **Receive**, and **Settings** are the same in both versions.  
Features available only in the Pro version are marked as **Pro** in this documentation.
- The navigation also includes the **Lockers** section, with the sub-items **Locker Dashboard** and **Settings**.
- The **Asset Tracking** module includes the submenu items **Dashboard**, **Search**, **Create**, and **Settings**.
- The **Letters** section combines functions for **searching**, **creating**, and **managing** letter notifications.
- In the **Inventory**, you can create and manage stock items and move them between locations.
- The **Administration** section includes **Contacts**, **Roles**, **Locations**, **Labels**, **Scheduled Imports**, and **Archiving** settings.

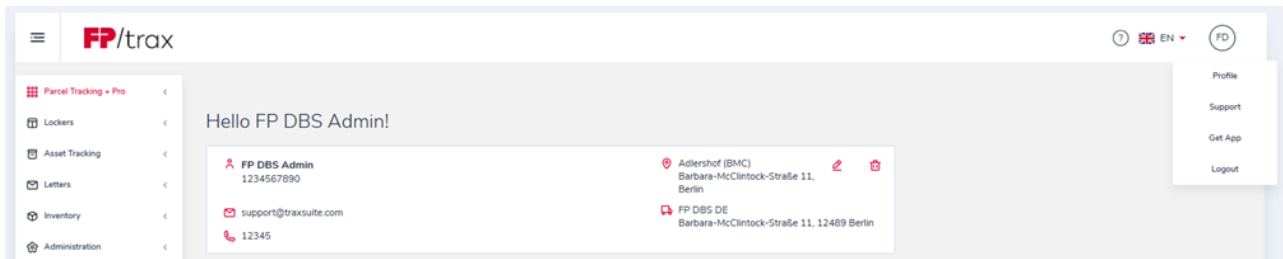
A detailed overview of all module functions can be found in section [3.1 FP Trax Features and Modules](#).

Fig. 22 Main Navigation Menu

## 5.2.2 Secondary navigation

Click on your initials in the top-right corner to open the **secondary navigation menu**.

### 5.2.2.1 Your profile



*Fig. 23 Profile view*

Click your initials in the top-right corner and select **Profile** to view and edit your personal information. Keeping your data up to date helps ensure accurate parcel and item assignments.

### 5.2.2.2 Support

In this section you will find the contact information for your FP Trax team.

### 5.2.2.3 Download the FP Trax app

In the secondary navigation, use the QR code in the **Get the app** section to install the FP Trax app, or download it directly from the app stores.



*Fig. 24 Download the mobile app*

#### Zebra devices

Open the device's web browser, scan the QR code directly in the address field using the built-in scanner, and press Enter to start the download.

**Note:** The DataWedge profile is installed automatically.

#### Mobile phones

Use your device's camera to scan the QR code, then open the displayed link in your web browser to download the app.

### 5.2.2.4 Log out

Log out of the FP Trax web application using **logout** button.

## 6 FP Trax Mobile App

### 6.1 Login



Your login data in the FP Trax mobile app is identical to that of the web application.

In the section *7.4.2 Create a Parcel (Mobile App)* and *7.5.2 Delivery (Mobile App)* Here you will find information on how to use the FP Trax app.

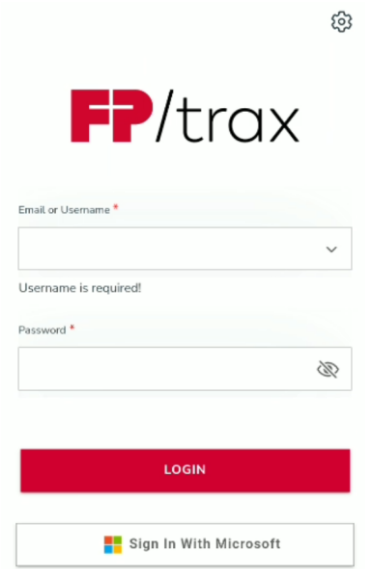
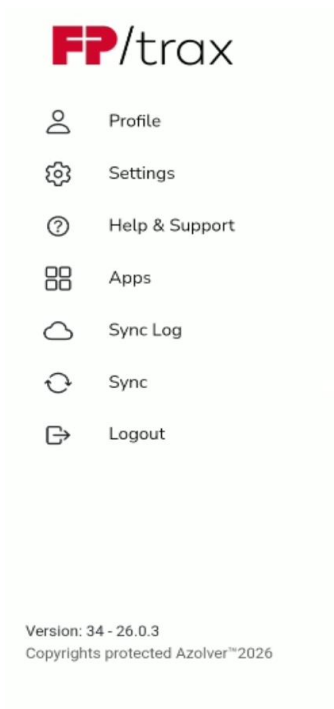


Fig. 25 Login Screen App

## 6.2 The mobile app menu



Click the **hamburger menu icon** in the upper-left corner to access the app menu. The installed app version is also displayed in this area.

*Fig. 26 FP Trax Mobile App > Menu*

### 6.2.1 Profile



Open **Profile** to view and edit your personal details. Click the **save icon** in the upper-right corner to apply your changes.

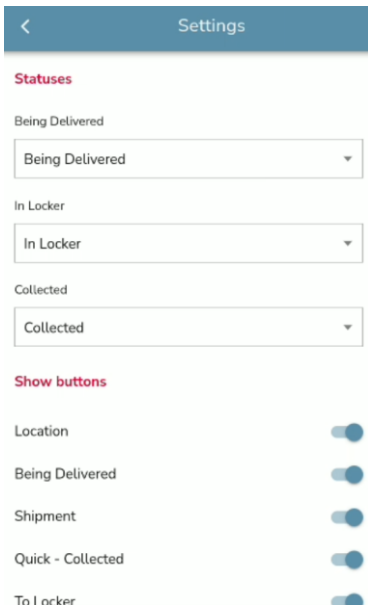
*Fig. 27 FP Trax Mobile App > Profile*

### 6.2.2 Settings

In the **Settings** section, you can customize the FP Trax app to suit your needs. The settings are organized into different areas for each module, such as **status buttons** and **app configuration**, which are explained in more detail in the following sections.

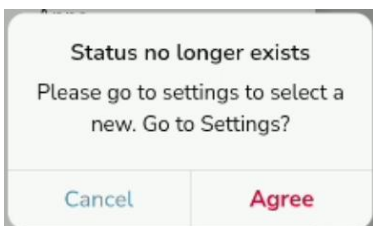
**Note:** Due to individual settings, the appearance and available functions of the app may vary between devices, even when using the same login.

### 6.2.2.1 Settings > Status Buttons



*Fig. 28 Settings > Status buttons*

In **Settings > Status Buttons**, you can select which shipment statuses are available in the app. These statuses are based on those configured in the web administration. You can also hide unnecessary buttons from the home screen to simplify the interface.



*Fig. 29 Note > Status no longer exists*

**Note:** If a status has been changed since your last app login, an error may occur when logging in or opening the affected module. This happens because the app does not automatically apply these changes.

In this case, please update the affected status in **Settings > Status Buttons**.

### 6.2.2.2 Settings > App Config

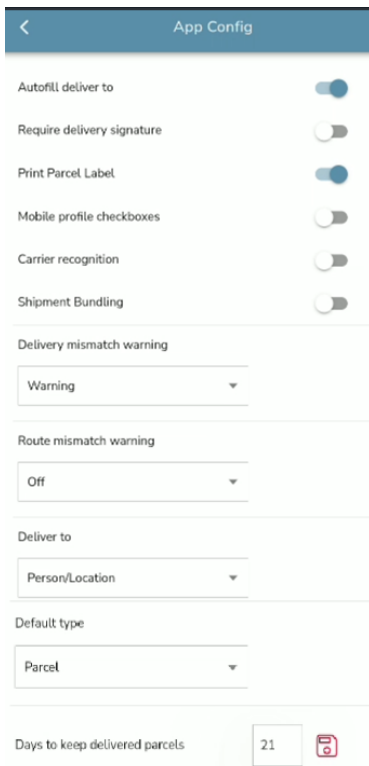


Fig. 30 Settings > App Config

In Settings > App Config, you can make the following settings:

**Note:** Any changes you make will apply only to the device on which the changes are performed.

**Autofill deliver to:**

When activated, the original recipient's name is automatically entered in the **Delivered to** field. You can change it if the parcel is handed over to someone else.

**Require delivery signature:**

This option allows you to specify whether a signature must be provided when a parcel is handed over.

**Print parcel label:**

Choose whether you want to print a label when creating parcels via mobile app.

**Mobile profile checkboxes:**

When enabled, checkboxes are displayed in the parcel list, allowing parcels to be selected manually.

**Carrier recognition:**

This function allows the app to automatically identify a suitable carrier based on the shipment number logic and prefill the carrier information.

**Shipment Bundling:**

The system automatically creates a single shipment when multiple parcels are scanned for the same recipient.

**Warnings:**

- Deactivate/activate warning messages if the original recipient and the person receiving the message do not match.
- Disable/Enable Route Error Alerts

**"Deliver To" Options:**

- Person or location (default)
- Location + Text – scan the location and have another text field to enter/scan more data
- Person Only
- Location Only

**Default Type:**

Select your preferred parcel type when creating packages.

**Days to keep delivered parcels:**

Specify the **number of days** that FP Trax should keep the data of the delivered parcels in the **local storage** of the mobile device.

**Note:** Please note that the app config is only available for editing if it has been activated in the web app under Administration > Roles. Cf. *12.2.2 Roles and permissions*

### 6.2.3 Apps

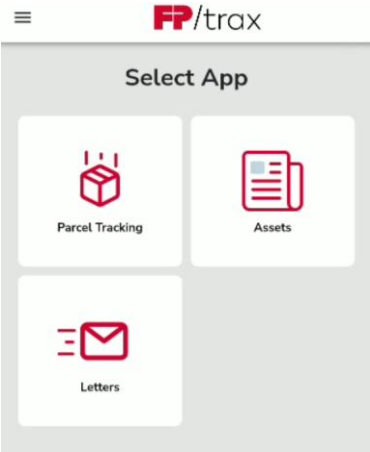


Fig. 31: Apps

Based on your purchased and activated FP Trax products, the **Apps** section allows you to choose between modules for parcel, asset, and letter management.

### 6.2.4 Sync Log

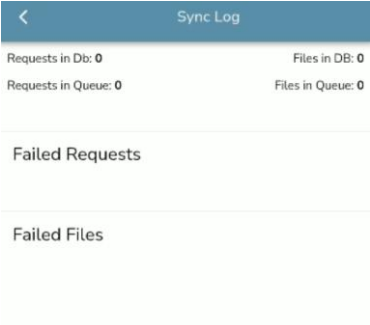


Fig. 32: Sync Log

This section provides access to the **logging function** of your FP Trax app. The logs help identify and understand any unexpected or incorrect behavior of the application.

If you contact support, please have this information available to assist with troubleshooting.

## 6.2.5 Sync / Offline Mode

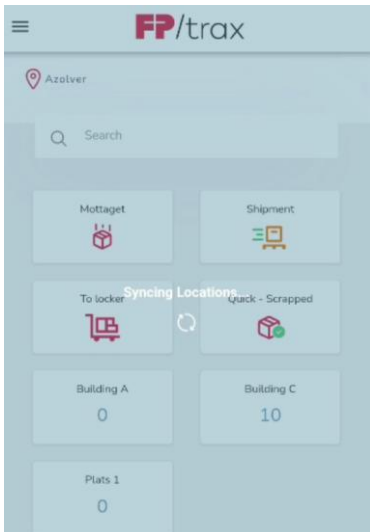


Fig. 33: Sync Log

If you are using the FP Trax app in **offline mode** or if the internet connection is unstable, you must manually start data synchronization once a connection is available.

To do this, open the **main menu** on the left side of the FP Trax app and select **Synchronize**. During the synchronization process, a message with a **progress indicator** is displayed.

## 6.2.6 Log out

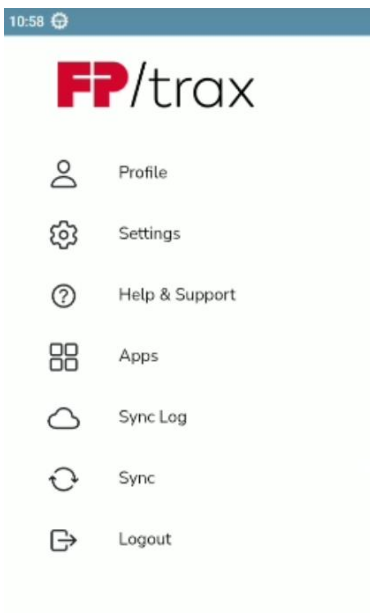


Fig. 34: Sync Log

Log out of the **FP Trax mobile app** when it is not in use to prevent unauthorized access by third parties.

## 7 Parcel Tracking / Parcel Tracking (+/Pro)

### 7.1 General Information Parcel Tracking (+/Pro)

#### 7.1.1 Business Parcels

After setting up the system and uploading the user data, you can now manage your business parcels with ease: enter parcel data and recipients in the system, automatically send your individual notifications and deliver the shipments as it best suits your business processes. See also *7.1.3 Parcel delivery options*

#### 7.1.2 Private Parcels

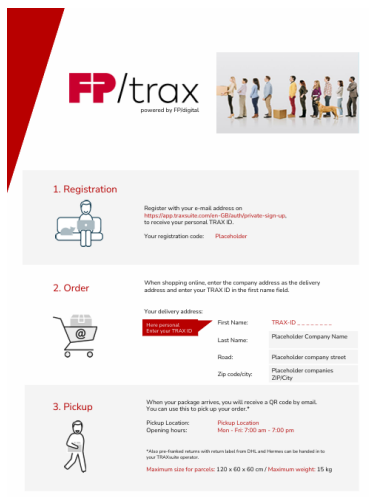


Fig. 35 Notice "How it works"

#### A smart perk for your employees

Let your employees receive **private parcels at work**. They can conveniently take parcels home at the end of the day—no missed deliveries, no extra trips to parcel shops.

With **FP Trax**, private and business parcels are clearly separated and handled efficiently. Delivery services shipment private parcels with business deliveries, ensuring first-attempt delivery, saving time and reducing CO<sub>2</sub> emissions. **Minimal effort for you. Real value for your team.**

#### How it works

While business recipients are managed directly in the **FP Trax system**, we can provide you with a **registration code for TRAX private use**. Employees can use this code to register voluntarily at:

**<https://app.traxsuite.com/de/auth/private-sign-up>**

Upon registration, each employee receives a **personal TRAX ID**. This ID is used in the delivery address instead of the employee's name. It allows you to clearly distinguish **private parcels from business** and handle them differently during parcel processing.

When recording a parcel, simply:

- enter the **TRAX ID** in the *Name* field,
- create an additional parcel type such as "**Private**" (see section 7.6.1 *Parcel Type*), and
- set up a **special pickup notification with a QR code** (see section 7.6.6 *Notifications*).

That's it—you're already offering your employees a **time-saving and convenient benefit**.

Talk to our FP Trax team.

## 7.1.3 Parcel delivery options

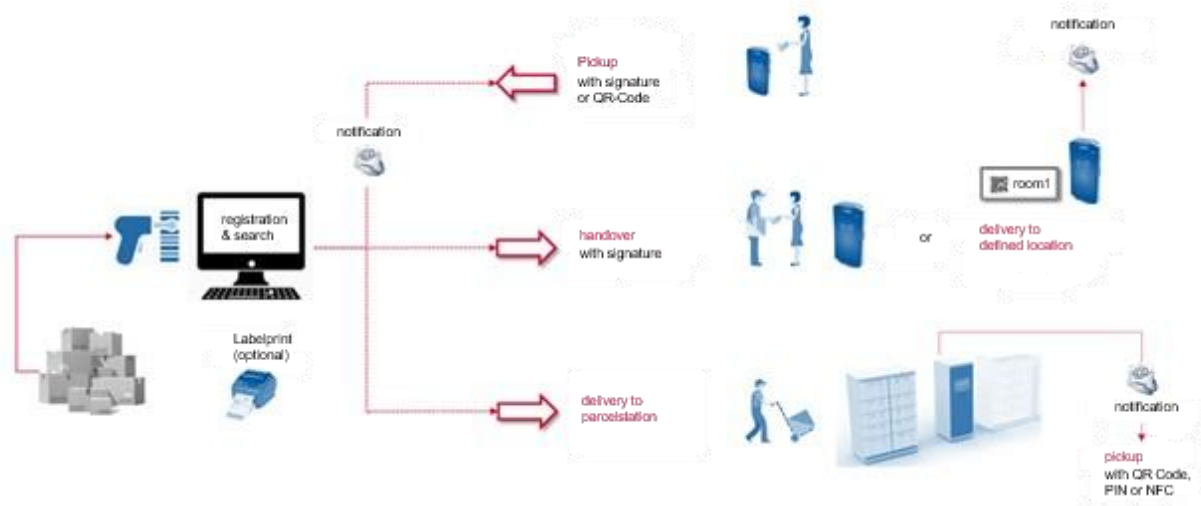


Fig. 36 Overview of delivery options

FP Trax supports multiple delivery options for business and private parcels, including pickup at defined locations, personal delivery, and parcel lockers. Recipients are automatically notified when their parcels are ready for collection.

## 7.1.4 Audit-proof delivery note documentation

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 The Dashboard

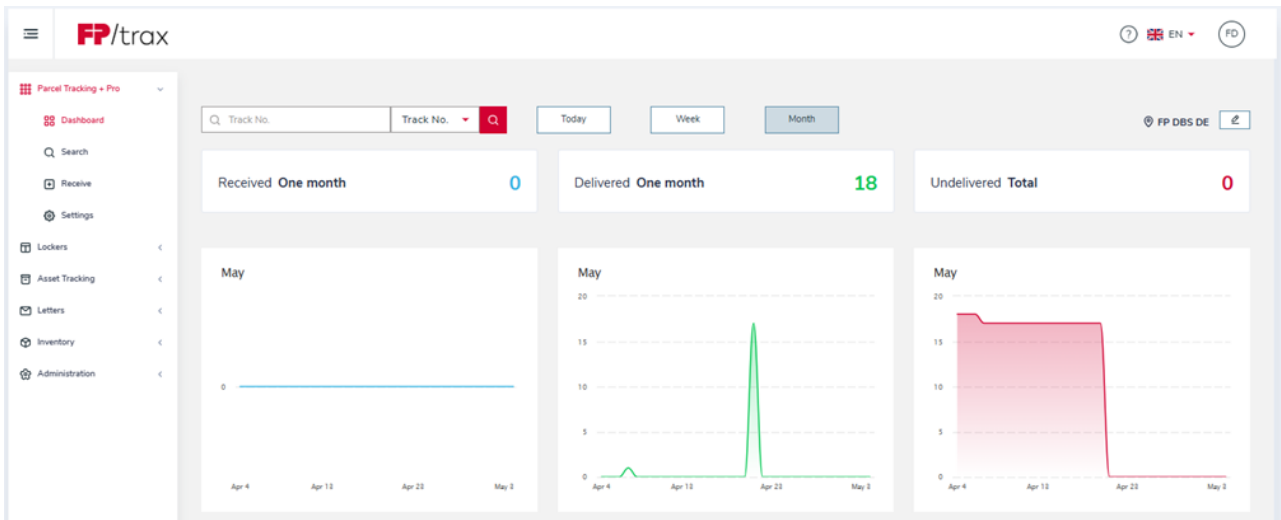


Fig. 37 Dashboard

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 Search

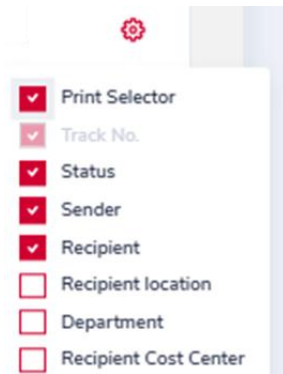
### 7.3.1 Search (web app)

<input type="checkbox"/>	Track No.	Status	Sender	Recipient	Delivered to	Created	Updated	Type	Carrier	Shipment No.
<input type="checkbox"/>	1734014469	Geliefert	Amazon	Max Mustermann	-	12/12/2024 15:41	04/21/2026 11:24	Einschreiben	DHL	-
<input type="checkbox"/>	TestSNr000	Geliefert	-	Max Mustermann	-	04/24/2025 11:14	04/21/2026 11:24	-	-	-

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 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*

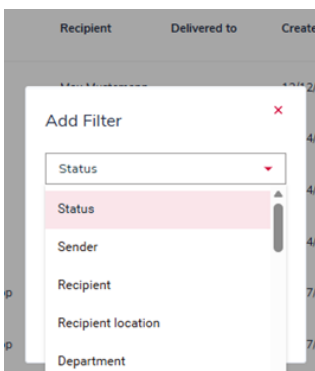
### 7.3.1.2 Search > Search by tracking number or free text



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*

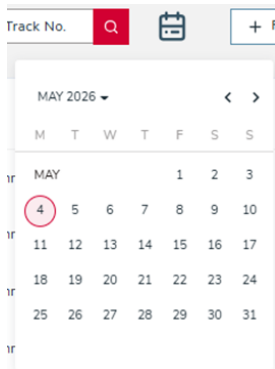
### 7.3.1.3 Search > Filter



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 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 Reprint parcel label

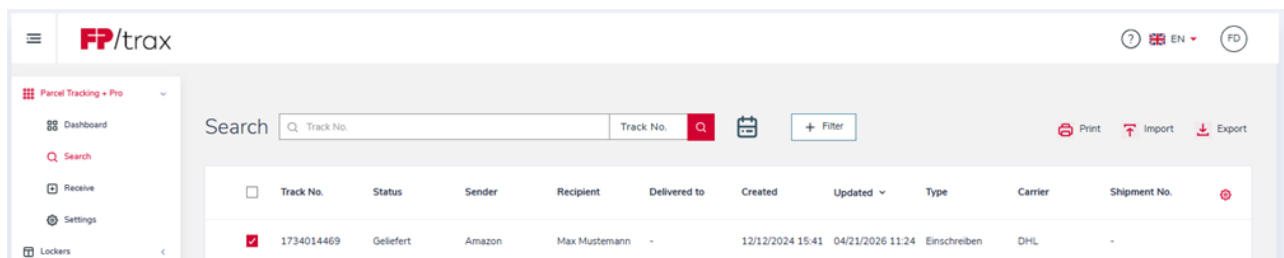


Fig. 43 Reprint parcel label

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 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 Manual data import



Fig. 44 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**.

	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.

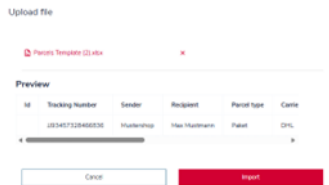


Fig. 46 Data Import Preview

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.

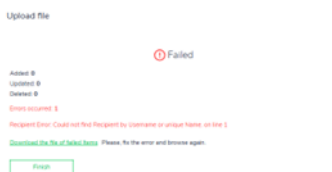


Fig. 47 Error Analysis Import

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.

Click **Finish** to complete the process.



Fig. 48 Successful import

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.

### 7.3.2.2 Parcel Data Export

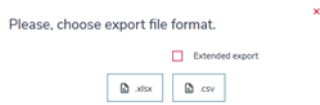


Fig. 49 Parcel Data Export

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.

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).

### 7.3.2.3 Bulk Deletion

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

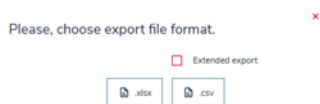


Fig. 50 Parcel Data Export

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

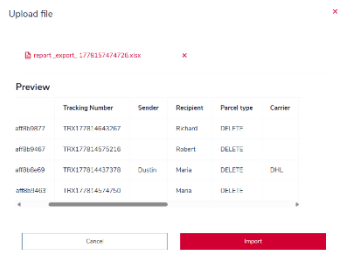
	A	B	C	D	E	F
1	Id	Tracking Number	Sender	Recipient	Parcel type	Carrier
2	69fc5c863a1fde4aff8b9877	TRX177814643267		Richard	DELETE	
3	69fc59de3a1fde4aff8b9467	TRX177814575216		Robert	DELETE	
4	69fc54c03a1fde4aff8b8e69	TRX177814437378	Dustin	Maria	DELETE	DHL
5	69fc59d73a1fde4aff8b9463	TRX177814574750		Maria	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 page → 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 Parcel Details (Web app)

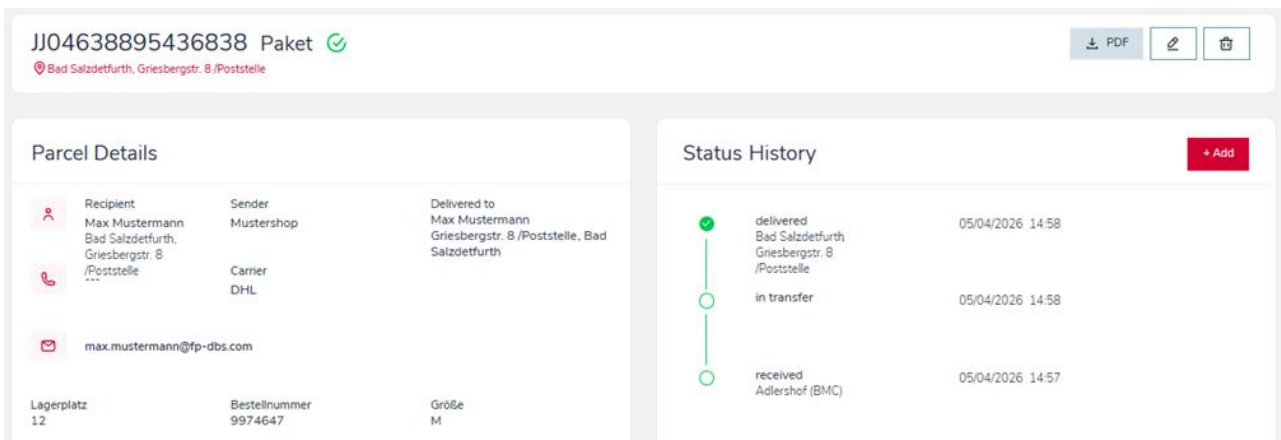


Fig. 54 Detailed view of the parcel

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 Parcel search and Parcel details (Mobile app)

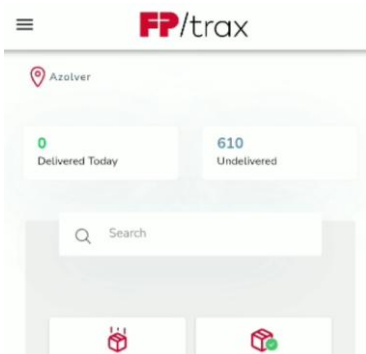


Fig. 55 Home screen of the app

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 and click on the eye icon.

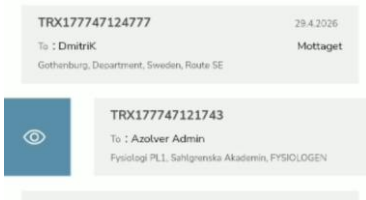


Fig. 56 Open Parcel details

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**.

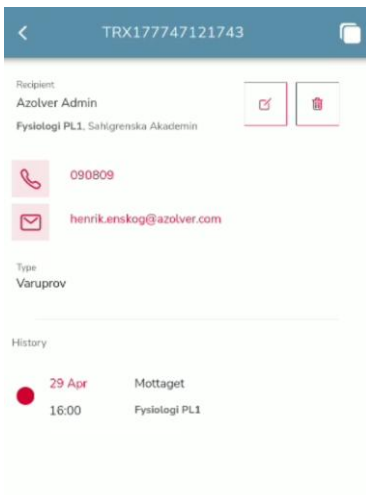


Fig. 57 View Parcel details

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.

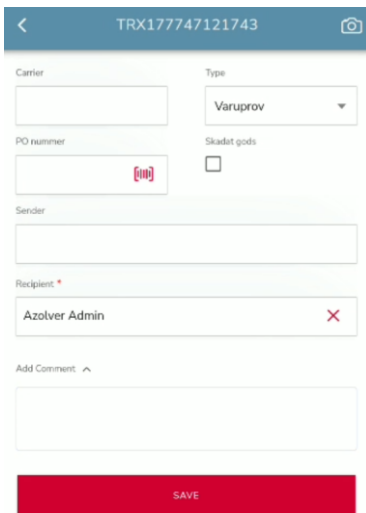
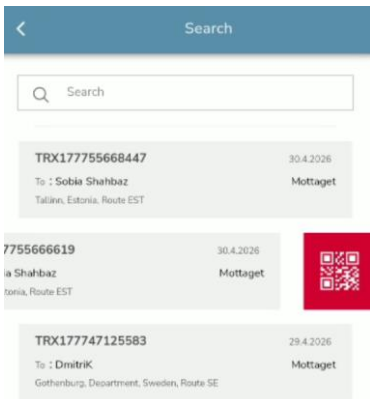
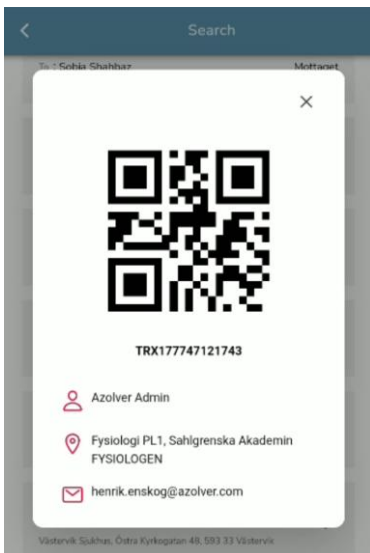


Fig. 58 Edit Parcel



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

Fig. 59 Show parcel 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.

Fig. 60 QR code

## 7.4 Receive Parcels

### 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.

#### 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.

Fig. 62 Select or add logisticians

### 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. 63 Select Parcel Type

### 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. 64 Select or add sender

### 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. 65 Select or add recipients

### 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.

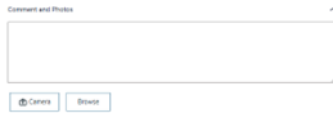


Fig. 66 Add comment and photo

## 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)



Fig. 67 Save

## 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 7.6.8.4 *Deliver Now Button* .

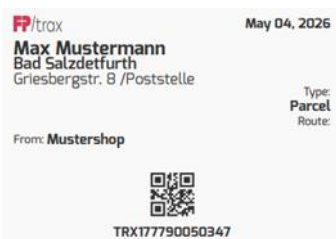


Fig. 68 Parcel label

## 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.

## 7.4.2 Create a Parcel (Mobile App)

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

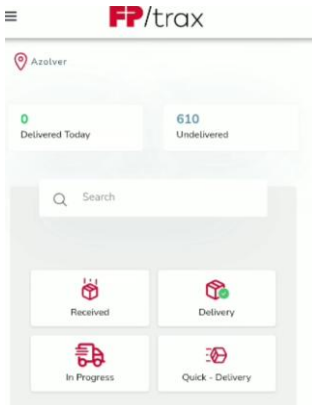


Fig. 69 Homescreen

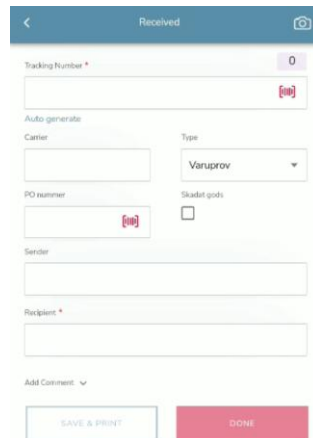


Fig. 70 Parcel data input field

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.

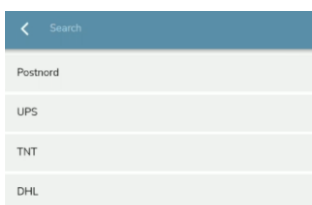


Fig. 71 Enter logistician



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.

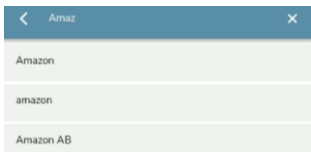


Fig. 73 Enter recipient or sender

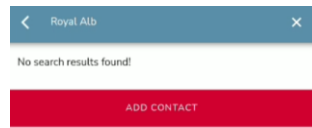


Fig. 74 Add sender or recipient

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.

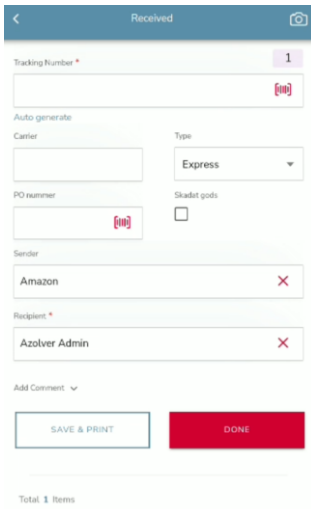


Fig. 75 Input

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:

- **Save & Print**  
Saves the shipment(s) and displays a cleared input form, allowing you to continue entering additional shipments.
- **Done**  
Saves the shipment(s) and returns you to the **main menu**.

### 7.4.3 Shipment Bundling (Parcel Tracking Pro)

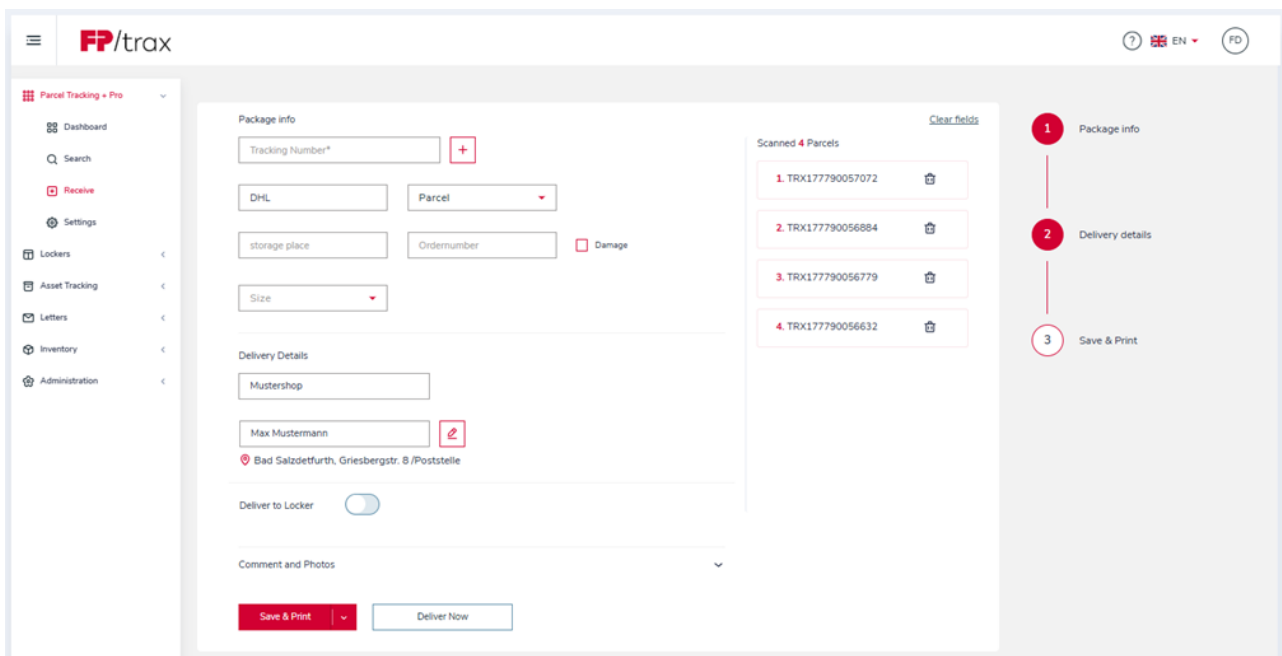
Shipment bundling simplifies handling when multiple shipments are delivered to the **same recipient** or **same location**.

Instead of processing each shipment individually, shipmentd 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 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*

#### 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**

## 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**.

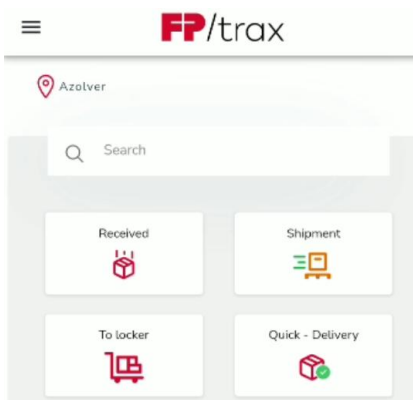


Fig. 78 FP Trax App > Startbildschirm (Mobile Profile)

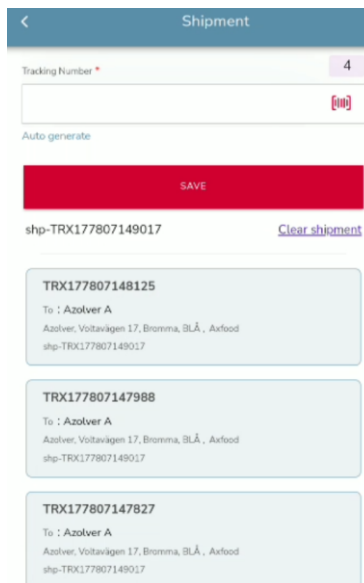


Fig. 79 Create a new shipment and assign shipments

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 shipment parcels for **different recipients** and with **different parcel details** into a single consolidated shipment.

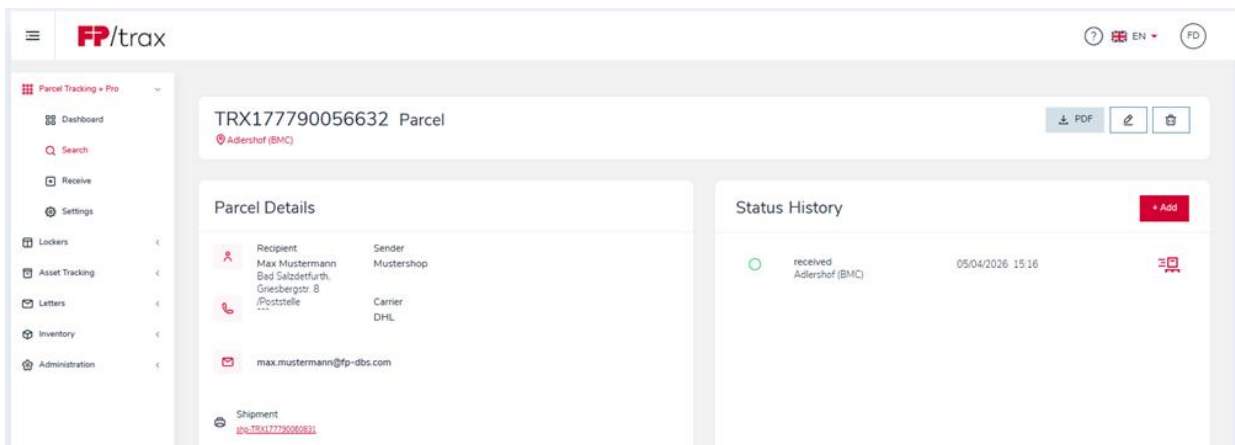


Fig. 80 Capture parcel

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.

### 7.4.3.2 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 Change of Status of a Shipment Consolidation

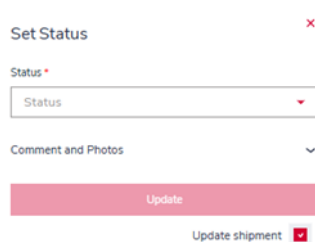


Fig. 81 Change in the status of shipment bundling

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

Parcel Tracking <sup>Pro</sup> > 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 Parcel delivery

### 7.5.1 Parcel delivery > Status change (web app)

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. 82 Change of status

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. 83 Status Change Recipient Selection

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

Fig. 84 Confirmation of status change

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.

Fig. 85 Download proof of delivery

## 7.5.2 Delivery (Mobile App)

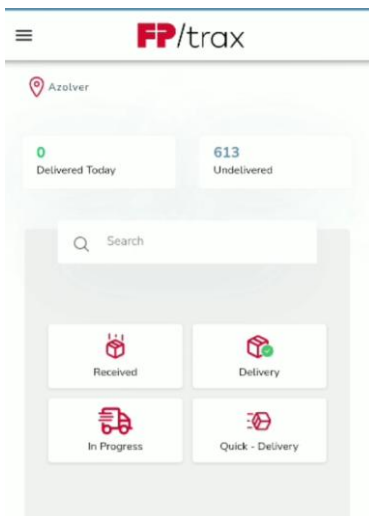


Fig. 86 Home Mobile app

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.

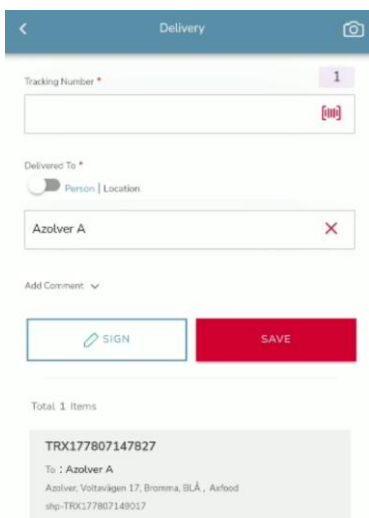


Fig. 87 Delivery screen

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**

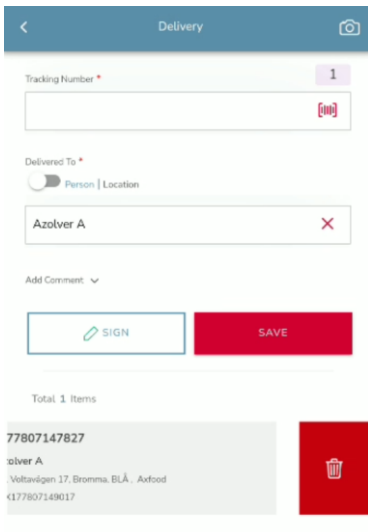


Fig. 88 Delivery screen

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.

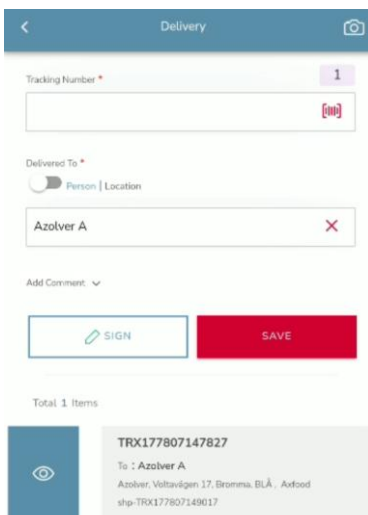


Fig. 89 Delivery screen

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.

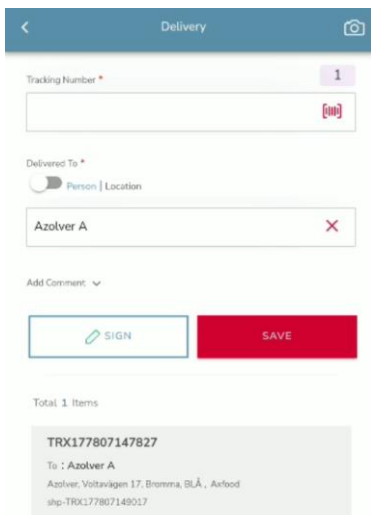


Fig. 91 Confirm Delivery

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 Settings

### 7.6.1 Parcel Type

New Type ×

Type Name

CREATE

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

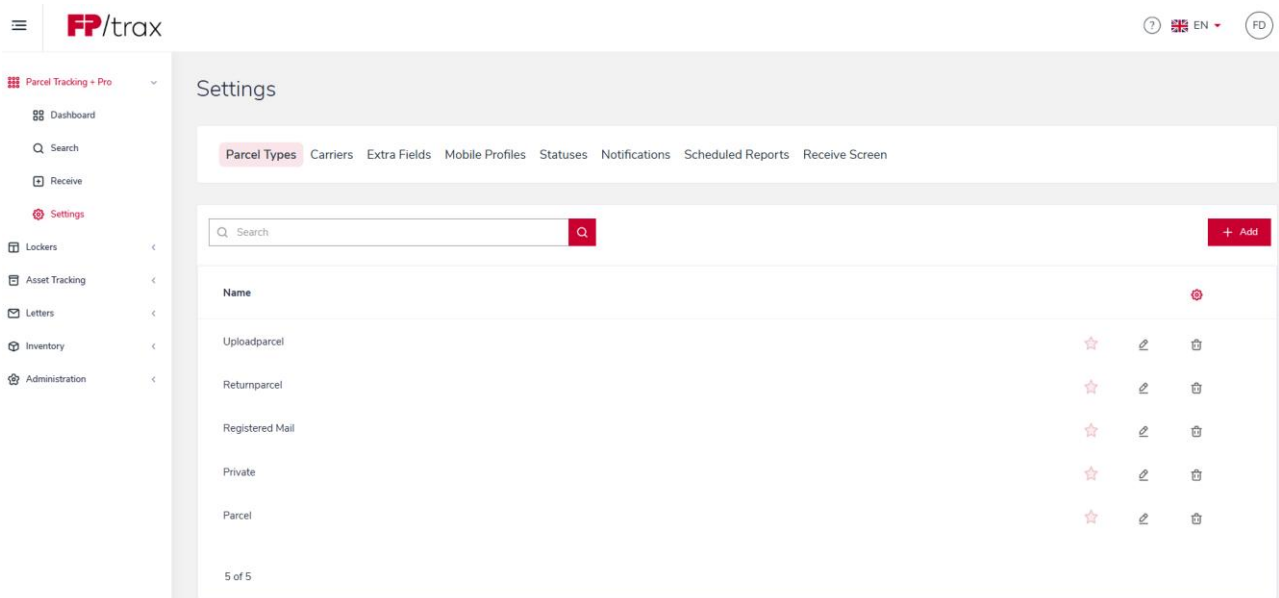


Fig. 93 Collection Parcel Type

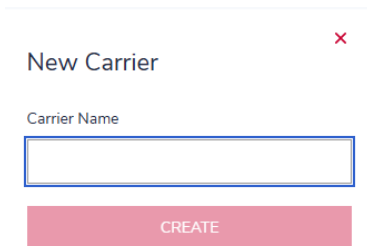
In the list of **parcel types**, you can mark a type as a favorite by clicking the **star icon** on the right side of the row.

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 Carriers



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](#)

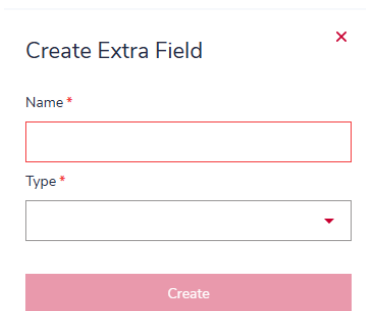
*Fig. 94 Logistician*



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*

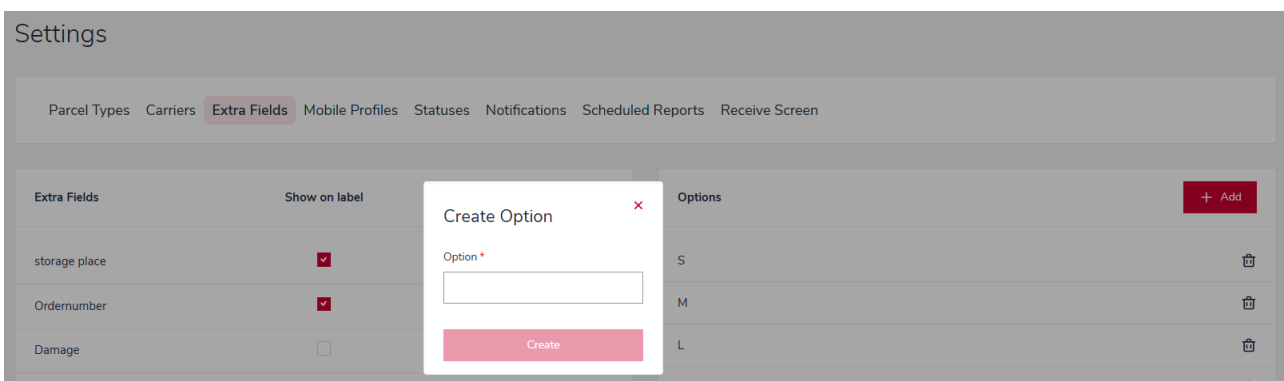
### 7.6.3 Extra fields



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. 96 Extra fields*



*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 Mobile Profile Pro

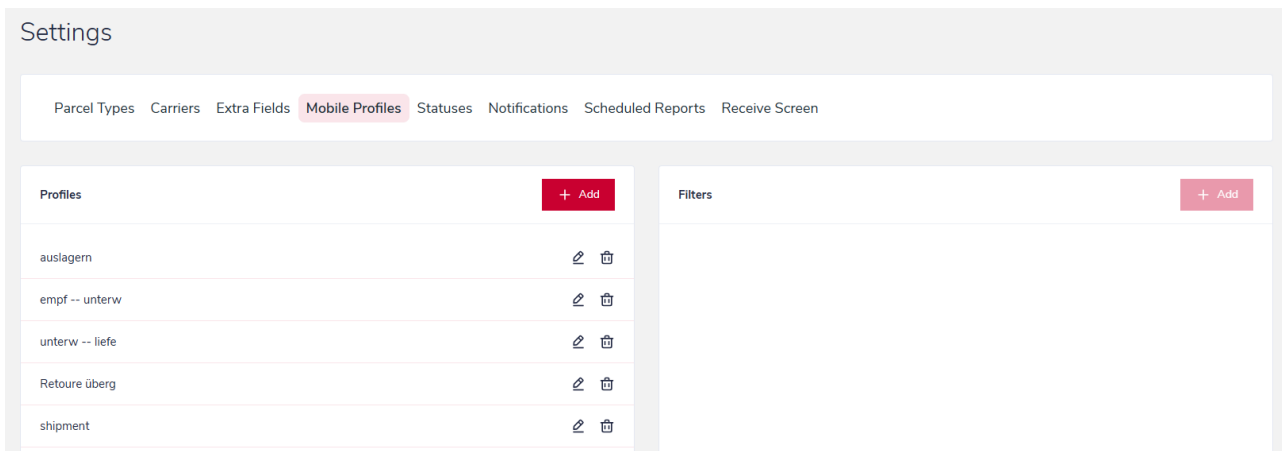


Fig. 98 Mobile Profile

In the Parcel Tracking <sup>Pro</sup> 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 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 after the shipment has been processed in the mobile profile.
- Profile Inputs/Pre-Selected Location
  - o 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.
  - o Shipment bundling: this mobile profile can be used to create shipments.
  - o Location and Shipment: Shipments can be created with the creation of pre-selected locations
- Filter Button
  - o Filters: in the mobile profile, the shipments can be filtered by recipient using the filter icon in the upper right corner
  - o 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".

Fig. 100 Mobile profile: Create filters

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.

#### 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.

#### 7.6.4.4 Use mobile profiles in the mobile app

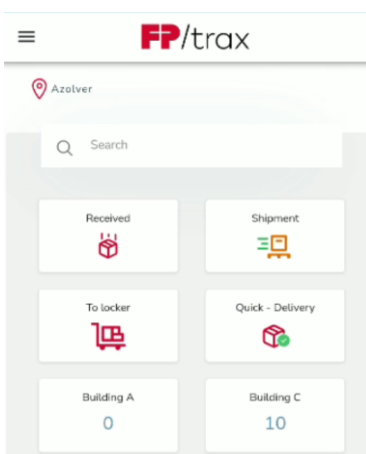


Fig. 101 Mobile profile in the mobile app

Once a **mobile profile** has been 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**.

## 7.6.5 Status

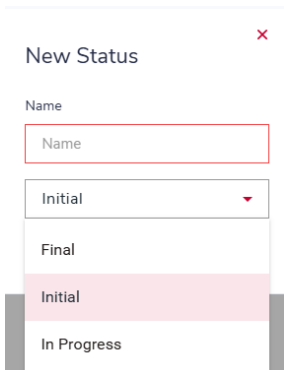


Fig. 102 Status

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

- **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.

**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 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 Notification management

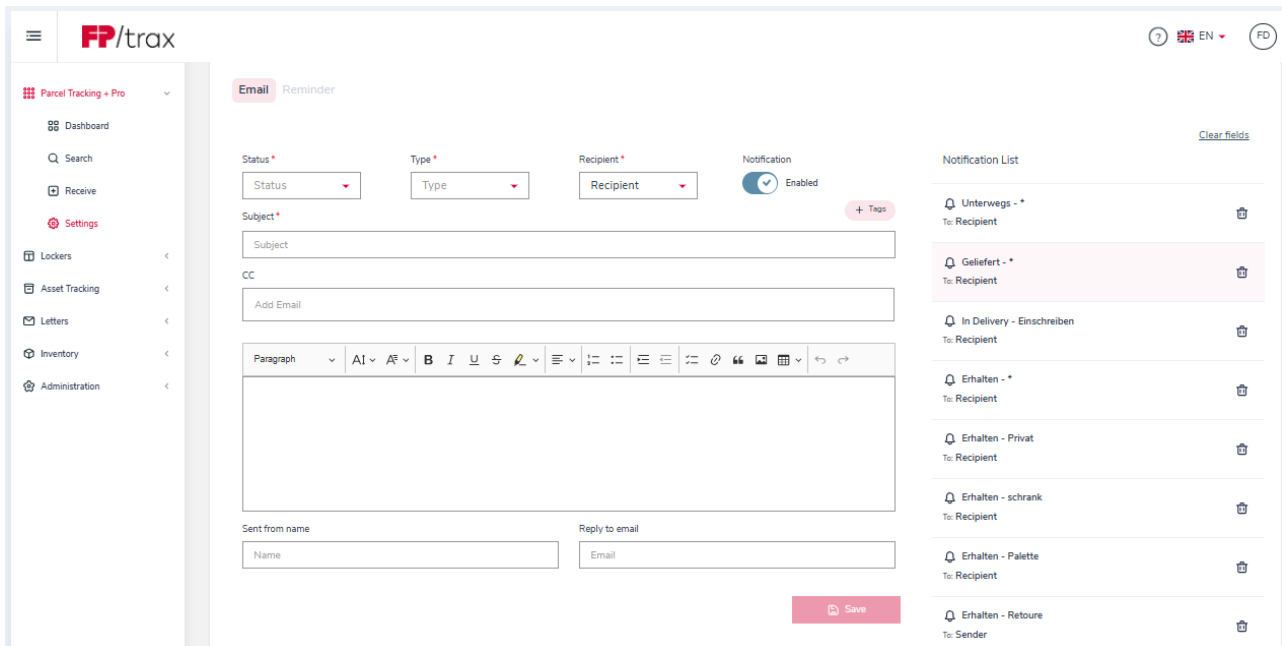


Fig. 103 Create custom notifications

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.

#### Available template tags

- Carrier - [Carrier]
- Dropoff Code - [Locker.DropoffCode]
- Dropoff QR Code - [Locker.DropoffCode.QR]
- Locker Code - [Locker.ReceiveCode]
- Locker QR Code - [Locker.ReceiveCode.QR]
- storage place - [Parcel.Extra.Field1]
- Ordernumber - [Parcel.Extra.Field2]
- Damage - [Parcel.Extra.Field3]
- Size - [Parcel.Extra.Field4]
- Sender name - [Parcel.From.Name]

#### 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

Fig. 105 Sent by and reply to

## 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. 106 Activation button

## (De)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 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.

## 7.6.6.2 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.

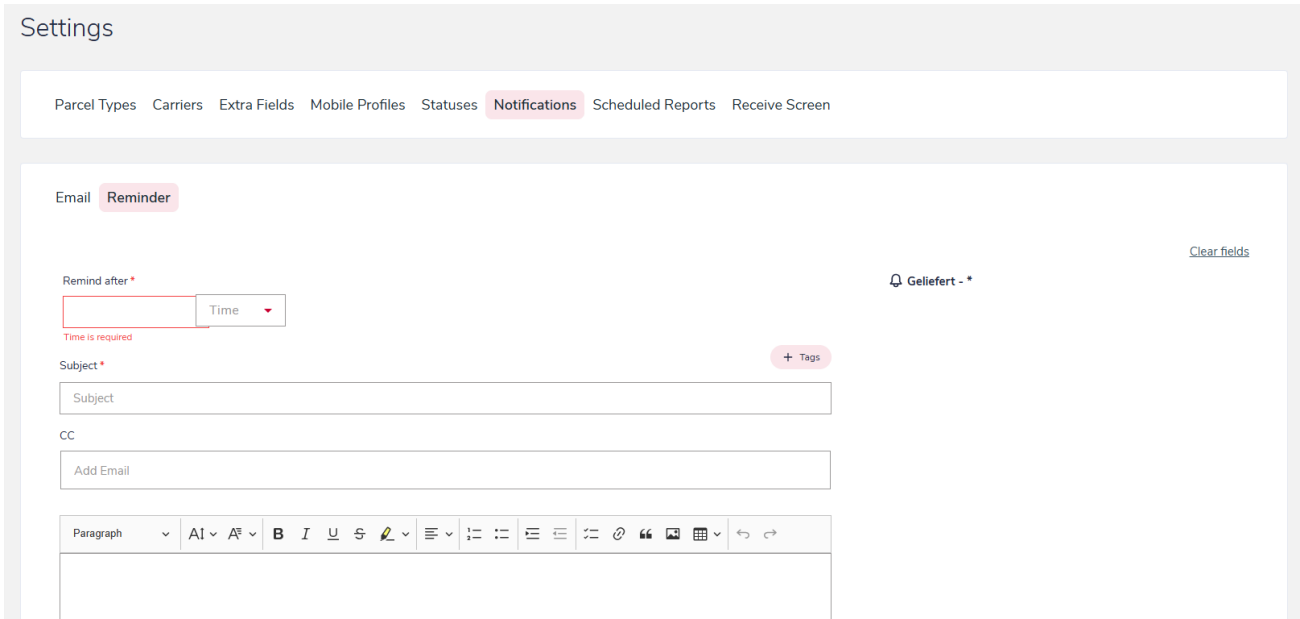


Fig. 109 Create a reminder

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. To this end, 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 Scheduled Reports

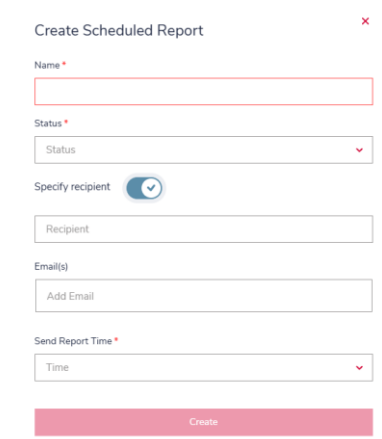


Fig. 110 Creating scheduled reports

**Create a scheduled report.** Reports generated and to receive them by e-mail, click on the "Add" button. Scheduled reports allow you to automatically generate reports based on selected parcel statuses and filter in the fields: name of the report, the recipients to be included in the report, the recipient's email address, and when the report should be sent. To create the report, go to the overview page and click on the "Add" button or more email addresses manually. The reports are then listed on the overview page and can be edited there by clicking on the pencil icon or deleted by clicking on the trash can icon.

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

You can add as many reports as you like.

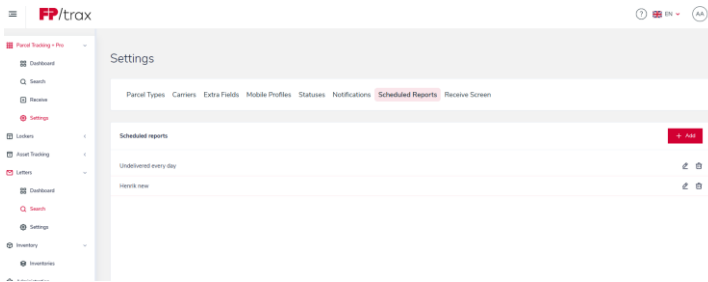


Fig. 111 Edit/delete scheduled reports

## Edit or Delete scheduled reports:

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

## 7.6.8 Receive screen

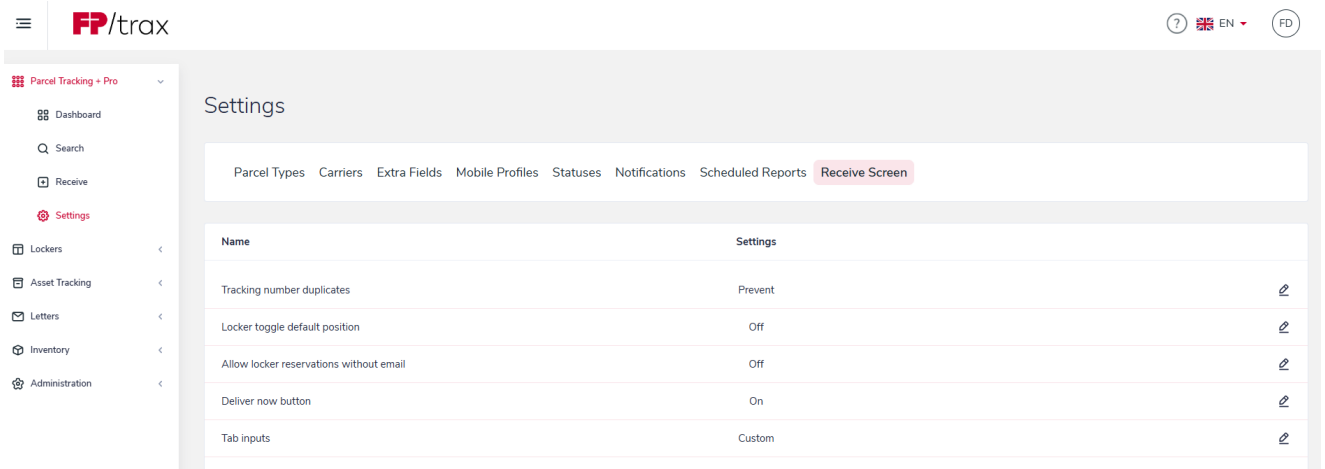


Fig. 112 Receive screen options

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 Tracking number Allow or disallow duplicates



Fig. 113 Tracking number duplicates

You change this setting by clicking the pencil icon in the corresponding row. In the window that opens, the Search by field, the recipient's name, the sender name of the notification.

- **Prevent (default)**

If you enter a potential address in the Reply to Email field, the same tracking 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.

- **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.

### 7.6.8.2 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 "Settings" field in the recipient's address card, the dialog that opens, select one of the following options:

If you enter an email address in the Reply to Email field, the notification recipient's reply will be sent to the checked or disabled by default in the Parcel Receive screen.

- **Off**

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.

### 7.6.8.3 Allow locker reservations without email



Fig. 115 Locker reservation without e-mail address

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.

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.

### 7.6.8.4 Deliver Now Button



Fig. 116 Deliver now button

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

In the dialog that opens, the "Sent by" field, the following options as the sender name of the notification.

- Off

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

- On

information has been provided, all inquiries/answers will be sent directly to FP Trax Support.

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.

### 7.6.8.5 Tab order in the receive screen

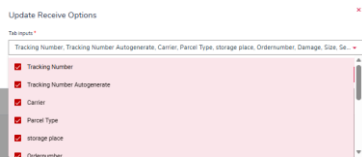


Fig. 117 Set Tab Order

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

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. 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.

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 Lockers

### 8.1 General information about the lockers



*Fig. 118 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](mailto:support@traxsuite.com)

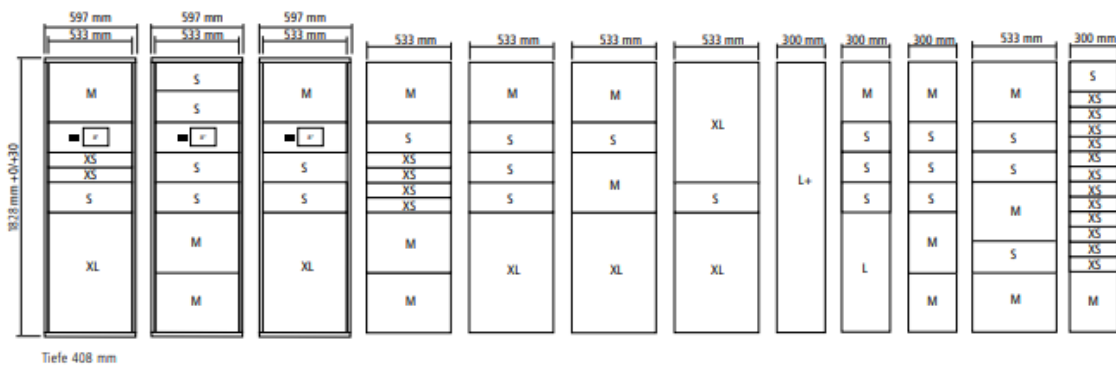


Fig. 119, fig. 120 , fig. 121 Examples of indoor and modular parcel box systems

## 8.2 The Dashboard

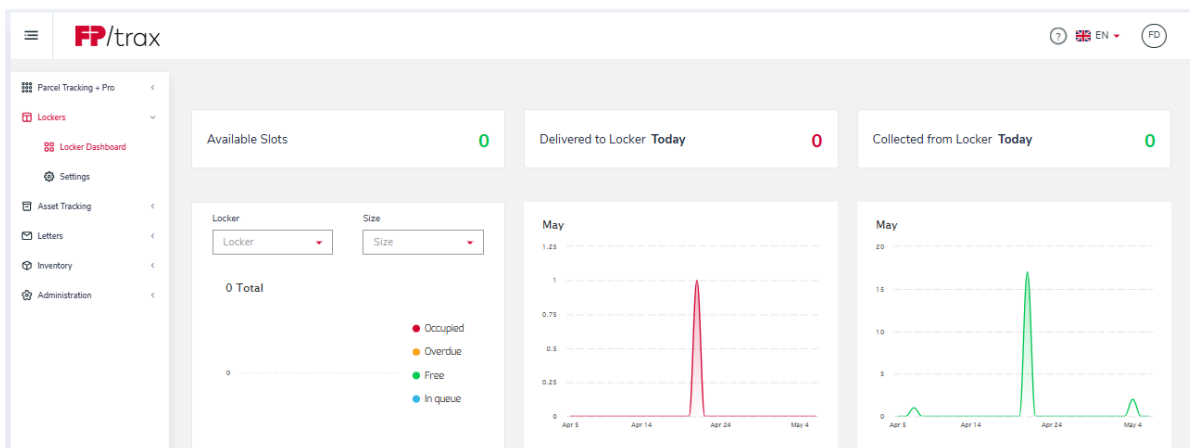


Fig. 122 Lockers > Dashboard

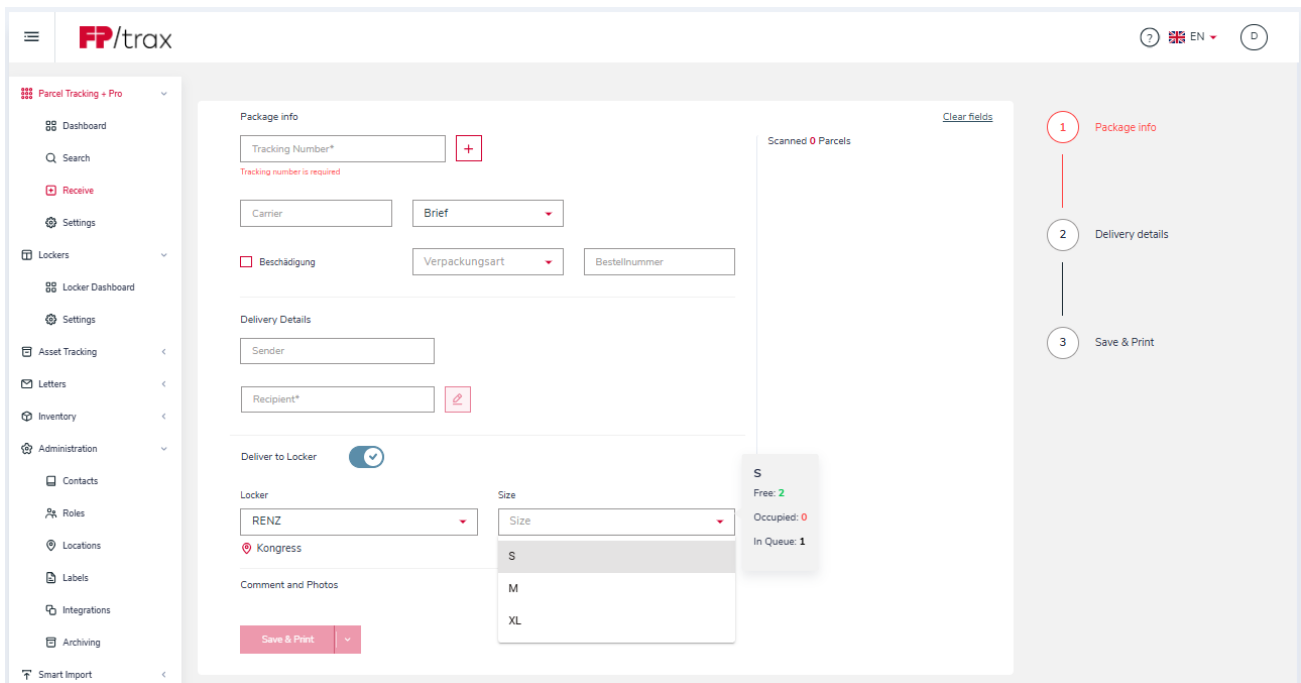
If a locker system is available at your location and you have the required authorization (see section **12.2.2 Roles and Permissions**), the **Lockers** section displays the dashboard. The dashboard provides an overview of the system's **capacity** and shows how many consignments are **delivered to**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

### 8.3.1 Register parcels to the locker



*Fig. 123 Record consignment for the locker system*

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

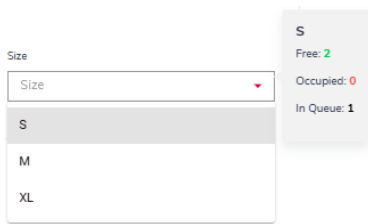
If multiple locker systems are available, select the desired system from the **drop-down menu**. Then choose the appropriate **compartment size** for the shipment.

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. 124 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. 125 Specialist workload

## 8.3.2 Loading consignments into a tray (RENTZ)

### 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. 126 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. 127 Logistician registration locker system

### 8.3.2.2 Insert the consignment into the locker system



Select the "Delivery via transaction number" button.

Fig. 128 Delivery of locker system



Fig. 129 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. 130 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. 131 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 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 Registration at the locker system



Fig. 132 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. 133 Service Home Screen

Select the menu item "Open compartment".

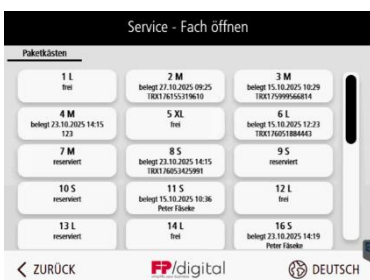


Fig. 134 Overview of compartments and longitudinal consignments

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 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 Shipment Processing (Cleveron & Flexity)

### 8.4.1 Register parcels to the locker

*Fig. 135 Create a parcel for the locker system*

The difference with entering a shipment without delivery to a locker is that you now activate the "Delivery to a locker" slider. If there are several locker systems available, you can select the desired system from the drop-down 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.

*Fig. 136 Occupied compartment size*

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

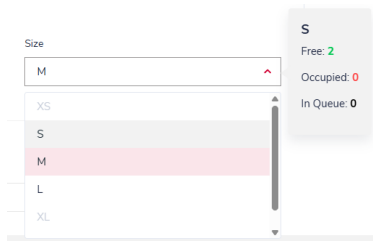
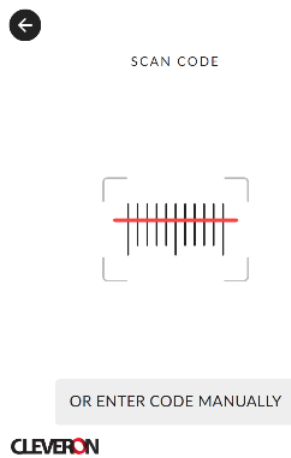


Fig. 137 Slot availability

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.

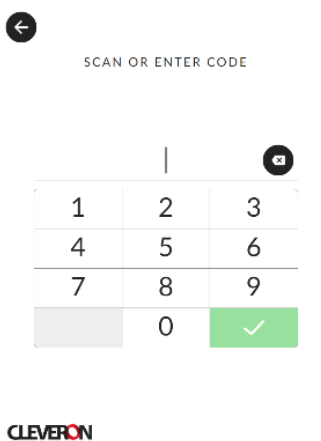
### 8.4.2 Loading parcels into a locker (Cleveron)



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.



## 8.5 Shipment Processing Flexity

### 8.5.1 Register parcels to the locker

The screenshot shows the FP/trax web interface for registering parcels to a locker. The interface is divided into a sidebar menu, a main form, and a right-hand navigation pane.

**Sidebar Menu:**

- Parcel Tracking - Pro
  - Dashboard
  - Search
  - Receive
  - Settings
- Lockers
  - Locker Dashboard
  - Settings
- Asset Tracking
- Letters
- Inventory
- Administration
  - Contacts
  - Roles
  - Locations
  - Labels
  - Integrations
  - Archiving
  - Smart Import

**Main Form:**

**Package info**

Tracking Number\*  +  
Tracking number is required

Carrier  Brev

PO nummer   Skadat gods

**Delivery Details**

Sender

Recipient\*

**Deliver to Locker**

Locker  Size   
 Reception Building A , Route A

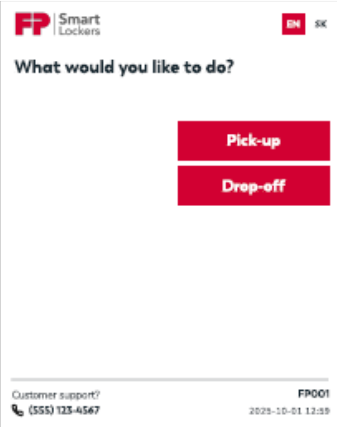
**Comment and Photos**

**Right-hand Navigation Pane:**

- 1 Package info
- 2 Delivery details
- 3 Save & Print

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

8.5.2 Loading parcels into a locker (Flexity)

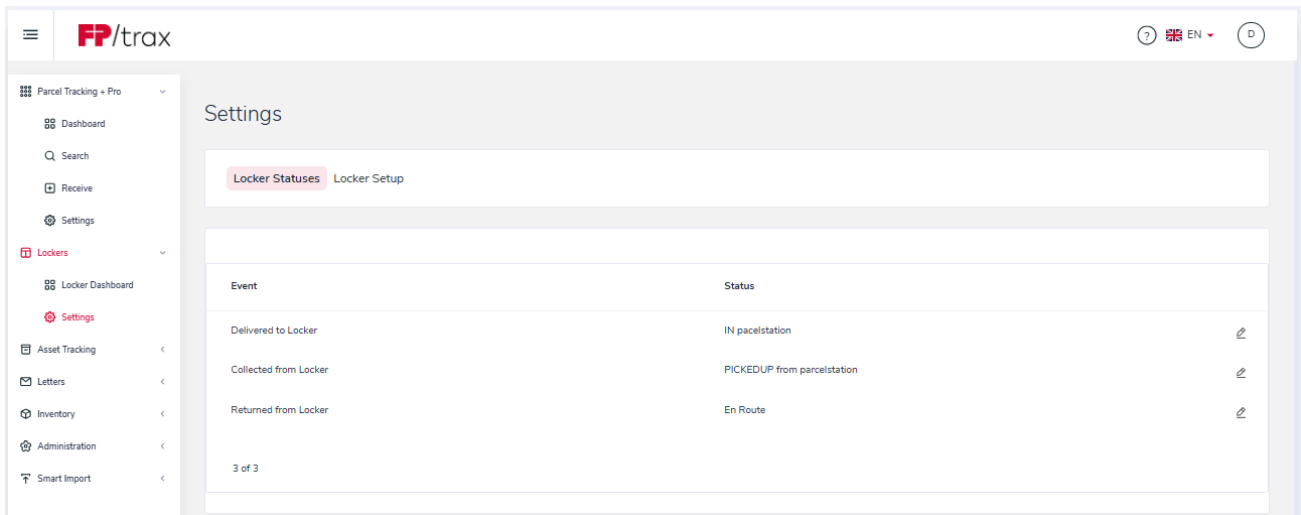


Click **Drop-off** Button



## 8.6 Lockers > Settings

### 8.6.1 Locker Status



*Fig. 138 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.
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**).

Map Status ×

Event  
Delivered to Locker

Status

In Locker ▼

Update

### Delivered to locker

Select an "In Progress" Parcel status that you have created from the drop-down menu. Cf. 7.6.5

Status

*Fig. 139 Status selection "delivered to locker"*

Map Status ×

Event  
Collected from Locker

Status

Locker Delivery ▼

Update

### 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. 140 Status selection "picked up from locker"*

Map Status ×

Event  
Returned from Locker

Status

Returned ▼

Update

### Returned from the locker

Select an "In Progress" Parcel status that you have created from the drop-down menu. Cf. 7.6.5

Status

*Fig. 141 Status selection "back from locker"*

## 8.6.2 Locker setup

Create Locker ×

Display Name *	Overdue Days *
<input type="text"/>	<input type="text" value="3"/>
Location *	Locker type *
<input type="text" value="Location"/>	<input type="text" value=""/>
External ID *	Service type *
<input type="text"/>	<input type="text" value="B2C"/>

Sync contacts to locker every 24h

Create Locker

*Fig. 142 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**.

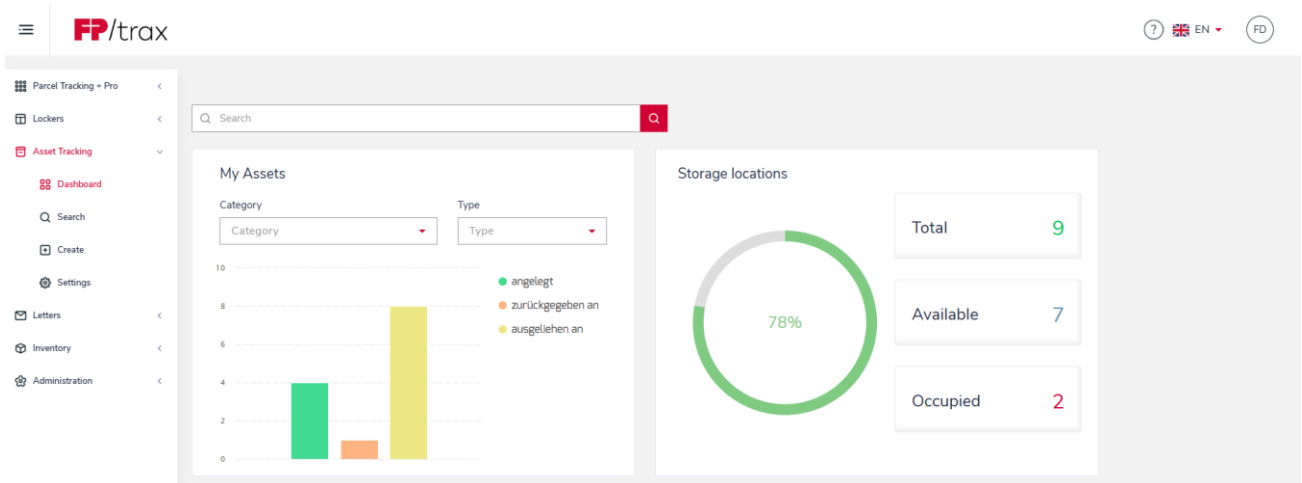
After entering all required information, click **Create Locker** to complete the setup.

## 9 Asset Tracking

### 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 The Dashboard



*Fig. 143 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 Search

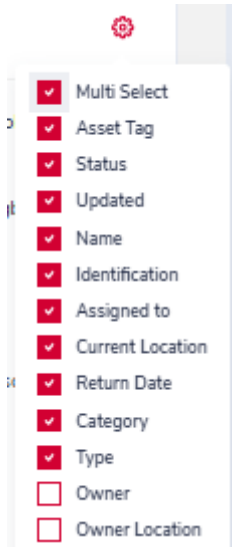
### 9.3.1 Asset search (web app)

<input type="checkbox"/>	Asset Tag	Status	Updated	Name	Identification	Assigned to	Current Location	Return Date	Category	Type
<input type="checkbox"/>	1234567676	ausgeliehen an	04/15/2026 13:39	Hilti Schlagbohrm...	-	Max Mustermann	Bad Salzdorf	04/17/2026	Werkzeuge & Ma...	Hilti Schlagbohrm...
<input type="checkbox"/>	12345454	angelegt	04/15/2026 08:20	Bosch Schlagbohr...	-	-	Adlershof (BMC)	-	Werkzeuge & Ma...	Bosch Schlagbohr...
<input type="checkbox"/>	7845789409	angelegt	04/25/2025 10:51	Neue Bohrmaschi...	-	-	FP DBS DE	-	-	-
<input type="checkbox"/>	1743167665	ausgeliehen an	04/08/2025 10:46	Hilti Bohrmaschine	-	Max Mustermann	FP DBS DE	04/10/2025	Werkzeuge & Ma...	Hilti Bohrmaschine
<input type="checkbox"/>	1744033060	angelegt	04/07/2025 15:41	Poolfahrzeug Vol...	B - FP - 1234	-	FP DBS DE	-	Poolfahrzeuge	Volvo XC60

Fig. 144 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**.

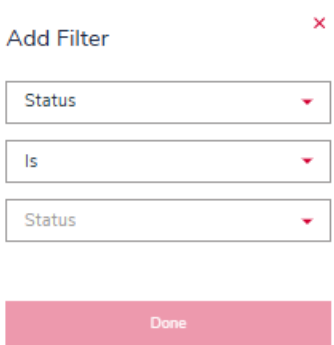
9.3.1.1 Asset overview > Adjustment of columns



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. 145 Selection criteria for Asset overview

9.3.1.2 Filter Asset list



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

Fig. 146 Filter selection

9.3.2 Asset Transaction Details (Web app)

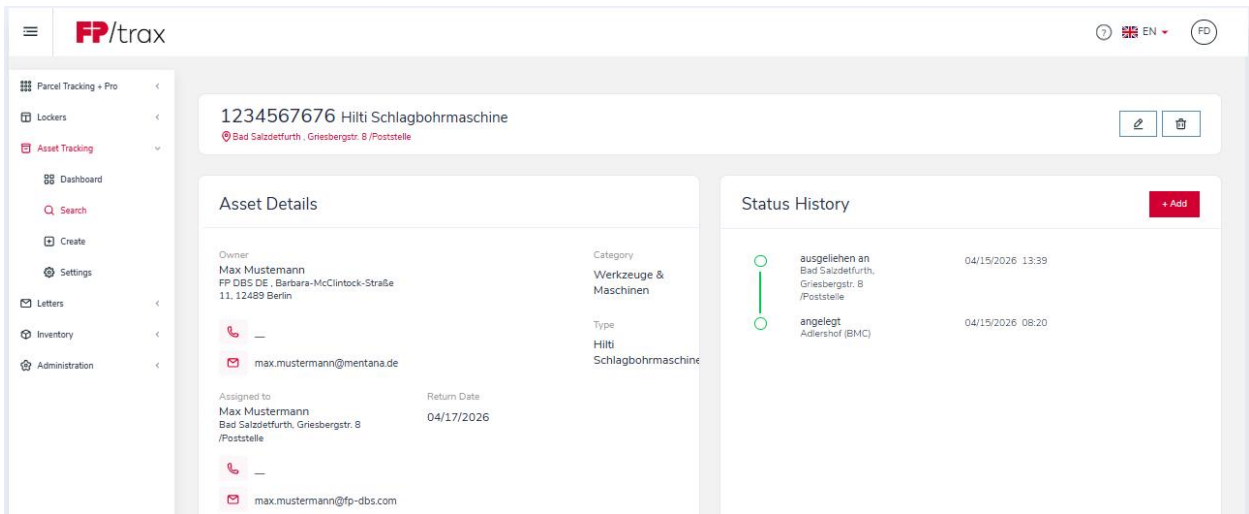


Fig. 147 Detailed view of the shipment

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 Changing Item Status

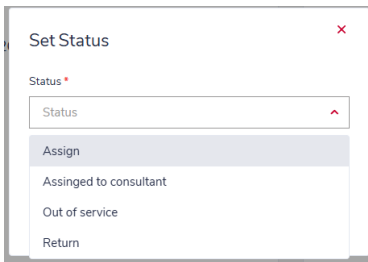


Fig. 148 Status selection

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.

### 9.3.2.2 Change Asset status > In use

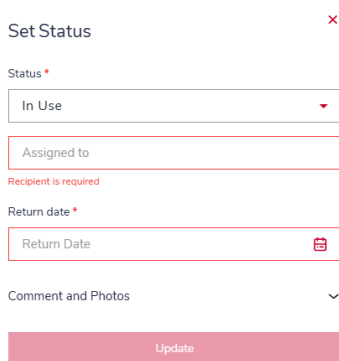


Fig. 149 Status > in use

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**.

### 9.3.2.3 Change Asset status > Final status

Set Status ×

Status \*

Final ▼

Assigned to

Recipient is required

Comment and Photos ▼

Update

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.

*Fig. 150 Status > final*

### 9.3.2.4 Changing Item Status > In store

Set Status ×

Status \*

in Wartung ▼

Assigned to

Return date \*

Return Date 📅

Comment and Photos ▼

Update

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.

*Fig. 151 Status > In store*

### 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 Manual data import

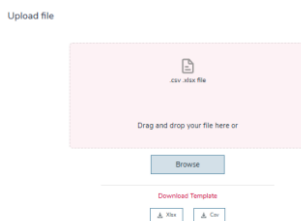


Fig. 152 Data import

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.

	A	B	C	D	E	F	G	H	I
1	Id	Asset Tag	Name	Identification	Owner	Category	Type	Description	External ID
2									
3									

Fig. 153 Import file

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

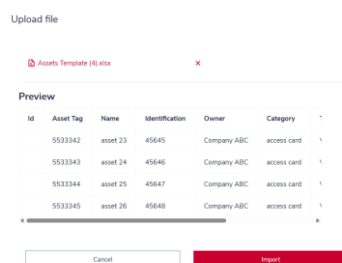


Fig. 154 Data Import Preview

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.

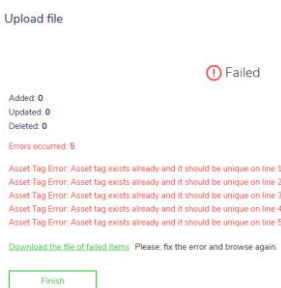


Fig. 155 Error Analysis Import

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".

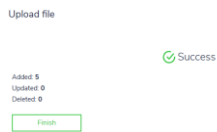


Fig. 156 Successful import

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 Asset data export

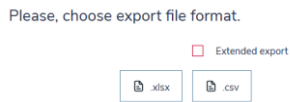


Fig. 157 Asset export

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.

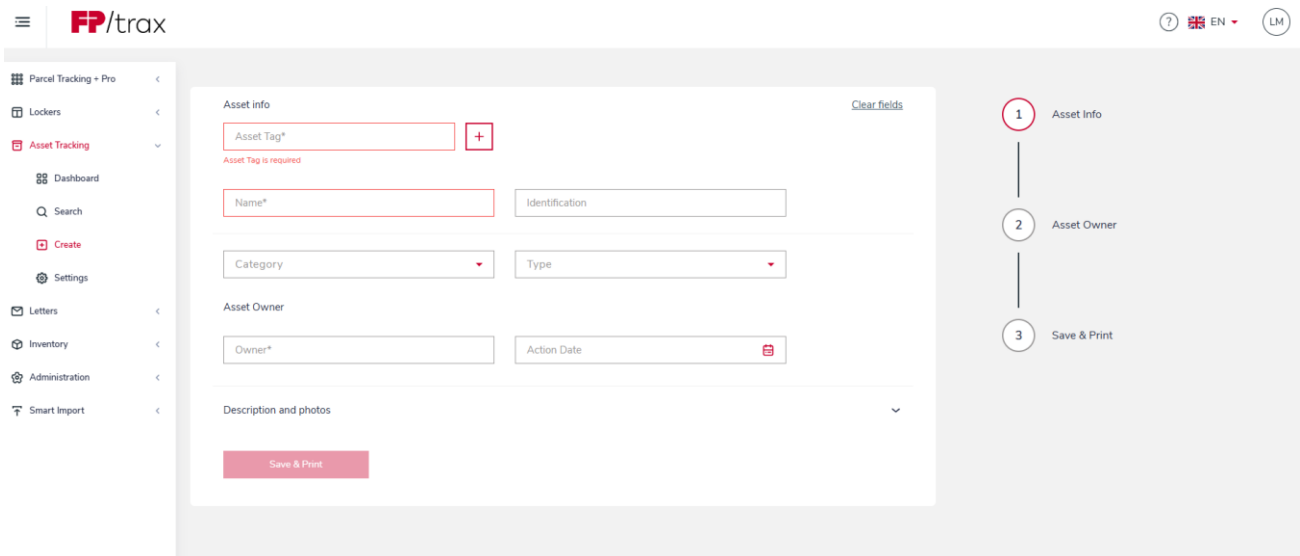
**Modify records:** Make changes to data and save them in the previously exported document. **Note:** a status change is not possible.

**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 Create an asset



*Fig. 158 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 Settings

### 9.5.1 Category & Type

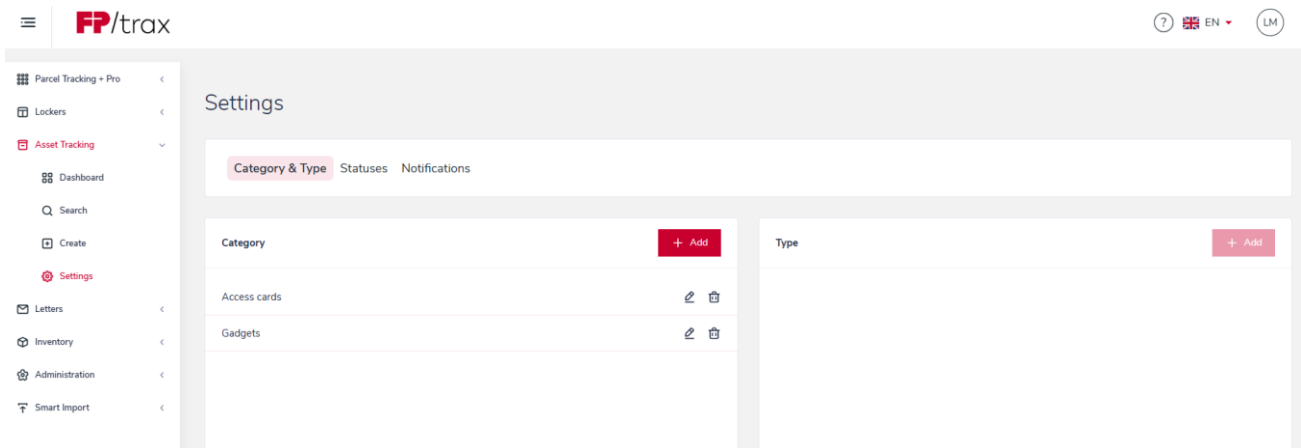


Fig. 159 Assets > Settings > Category & Type

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 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. 160 Add Category

### 9.5.1.2 Add Type

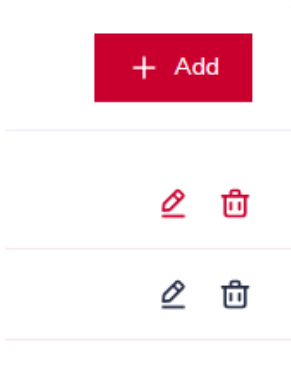
Select the **category** to which you want to add one or more types by clicking on the corresponding row. The selected category is highlighted, and the **Type** section on the right becomes active.

In the **Type** section, click **Add**, then enter a name for the new type in the **Type Name** field. Confirm your entry by clicking **Create**.

Fig. 161 Add Type

The newly created type will appear in the type list on the right. You can repeat this process to add as many types as needed.

### 9.5.1.3 Edit category or type

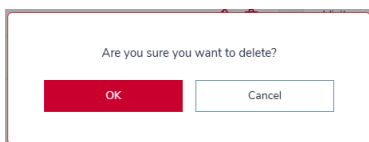


Click the **pencil icon** in the row you want to edit. After making your changes, click **Update** to save them. The updated information will appear in the list.

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

Fig. 162 Edit Category/Type

### 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. 163 Delete category/type

## 9.5.2 Status

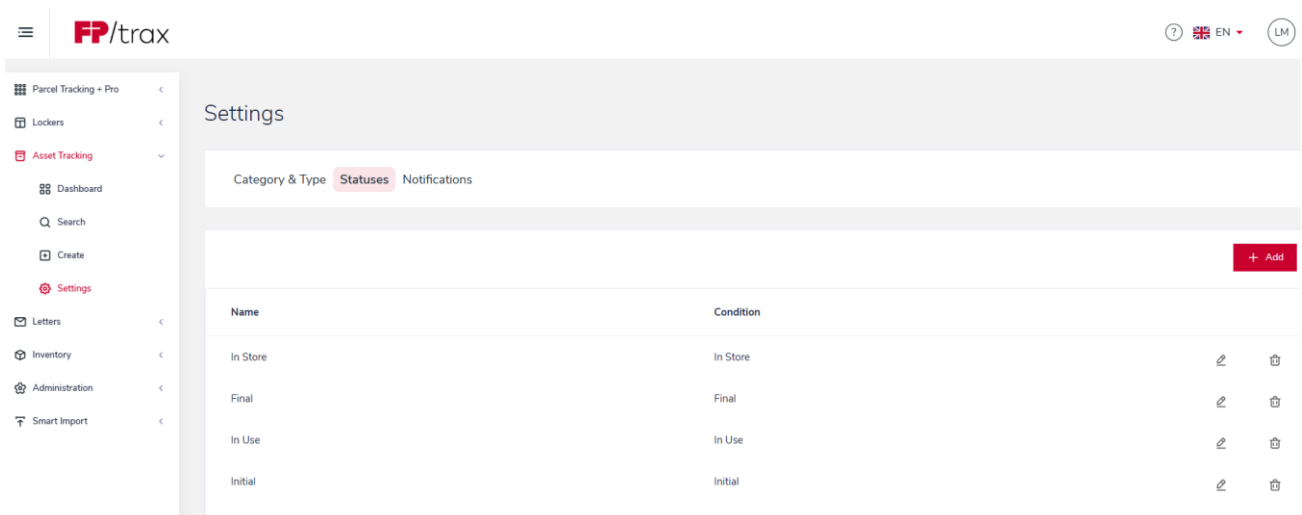


Fig. 164 Assets > Settings > Status

### 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:

- **Initial**

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

- **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*.

- **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*.

- **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.

#### 9.5.2.2 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.

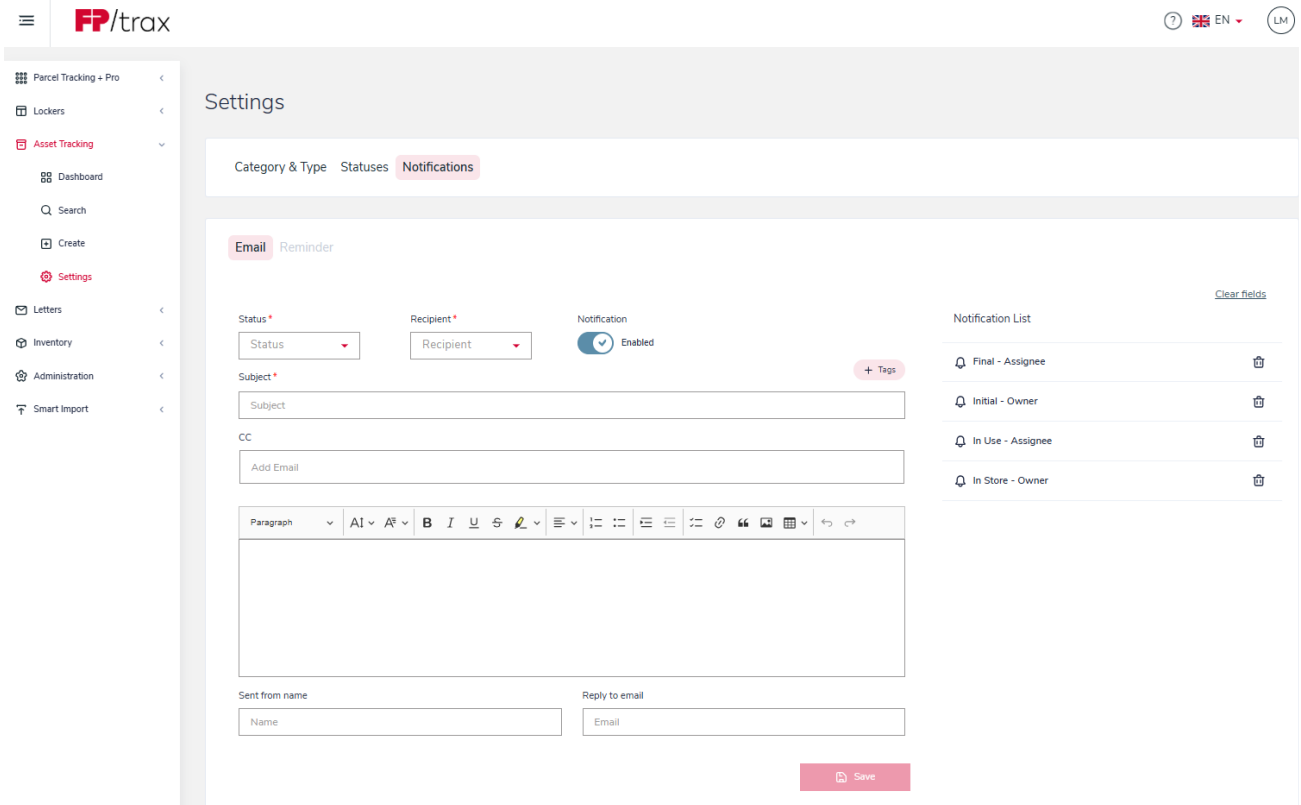
#### 9.5.2.3 Delete status

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 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 Notification management



*Fig. 165 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.

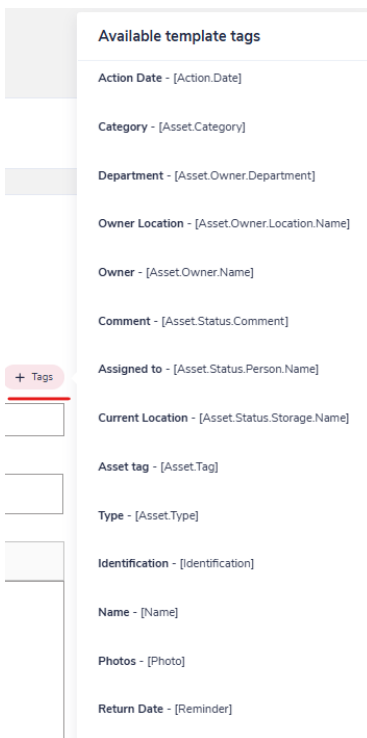


Fig. 166 Selecting tags for a notification

### 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.

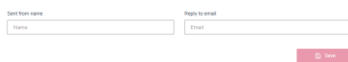


Fig. 167 Sent from name and reply to email

### 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.

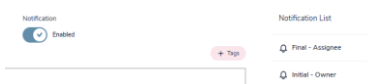


Fig. 168 Activation button

### (De)activating notification sending

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.

In Use - Assignee	🗑️
In Store - Owner	🗑️

### Save/edit/delete notification

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

Fig. 169 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 Management of reminders

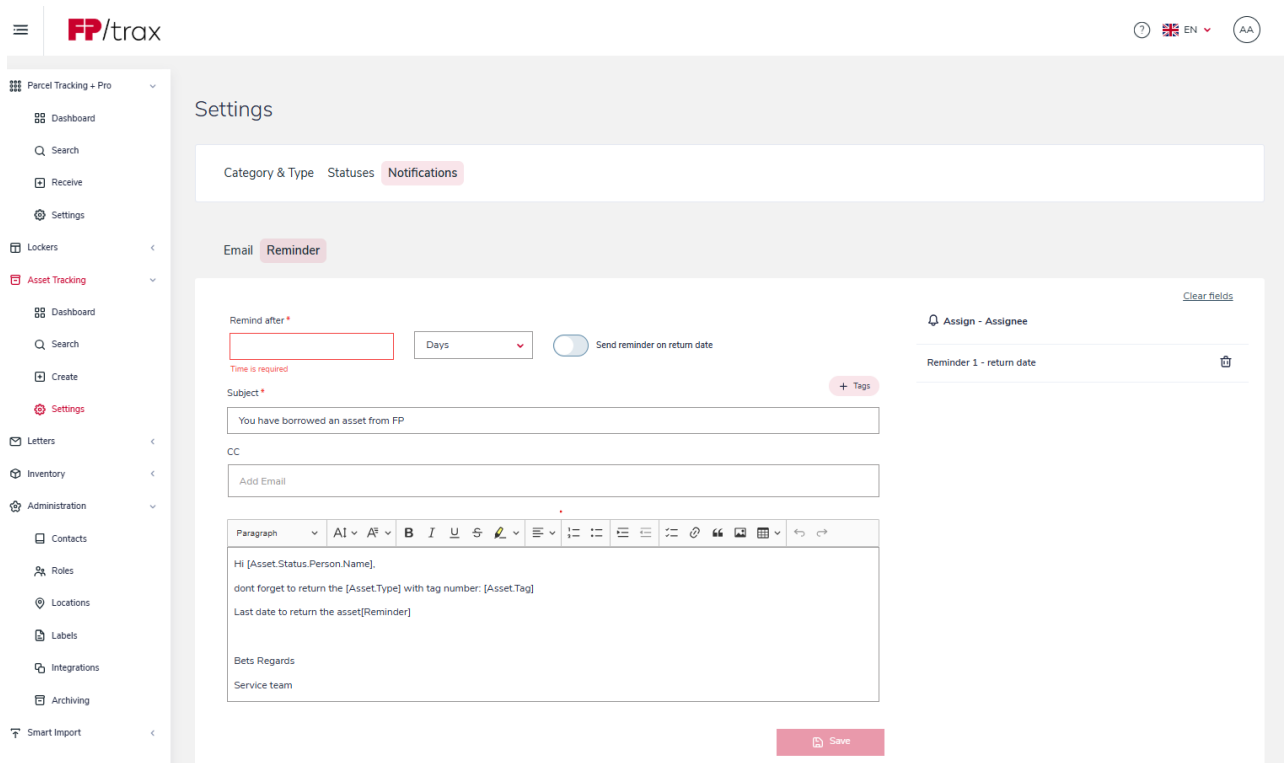
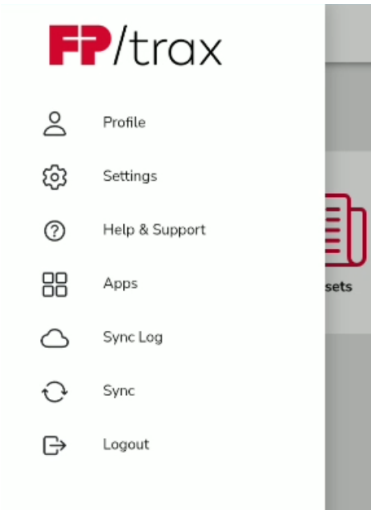


Fig. 170 Asset tracking > Settings > Notification > Email

## 9.6 Asset management in the FP Trax Mobile App

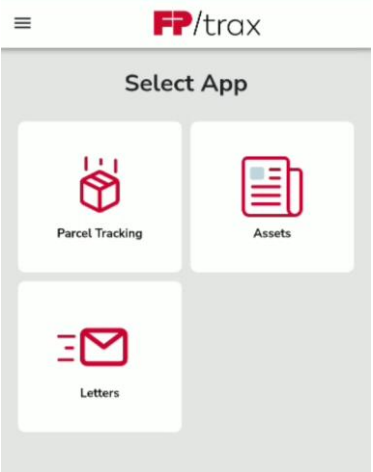
### 9.6.1 Module selection



### 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. 171 Main Menu > Apps



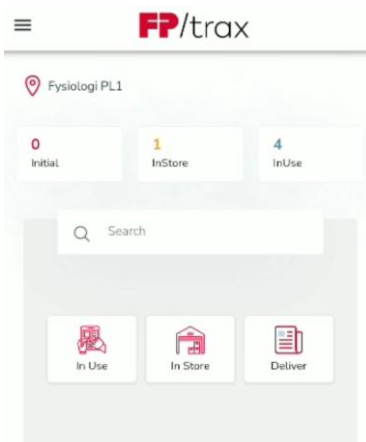
### Selection of the module

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.

Fig. 172 Apps > Modules: Assets

### 9.6.2 Asset tracking > Home screen



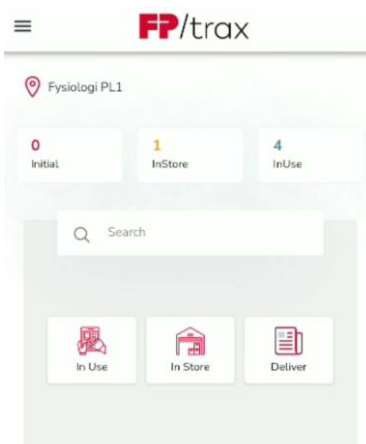
On the home screen in the Asset Tracking module, you will get an overview of the number of items that have been created, are in store or are in use. You can also search for an item using the search bar.

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. 173 Asset Tracking: Home Screen*

### 9.6.3 Asset tracking > Asset search

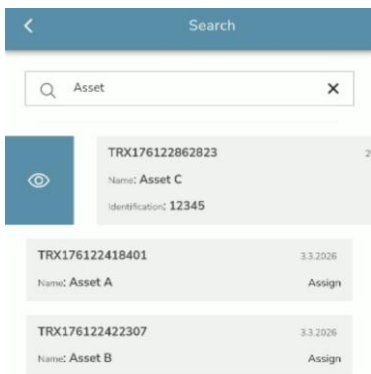


You can search for an item in the FP Trax app in different ways.

- 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.

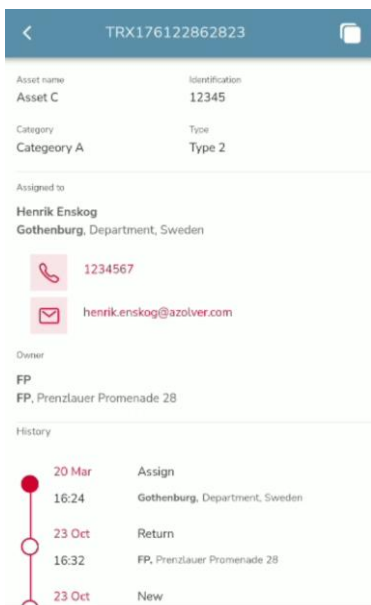
*Fig. 174 Asset Tracking: Home Screen*

### 9.6.4 Asset tracking > Search > Asset details



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

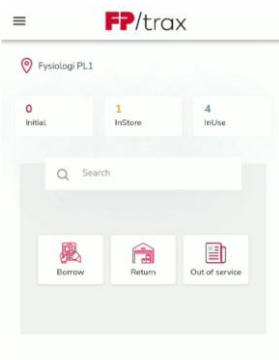
*Fig. 175 Open product details*



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.

*Fig. 176 View product details*

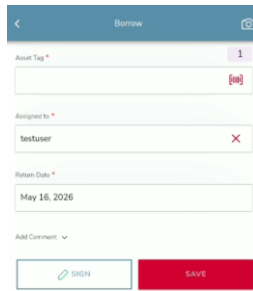
**9.6.5 Asset Tracking > Loan/Borrow the Item**



*Fig. 171 Asset Home screen*



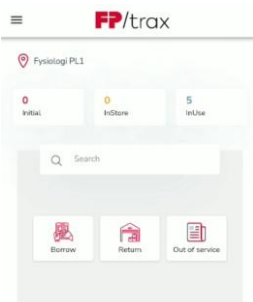
*Fig. 172 Asset Borrow*



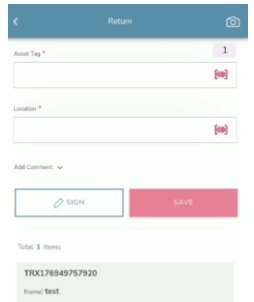
*Fig. 173 Asset Sign and Save*

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.

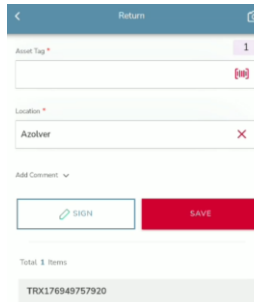
**9.6.6 Asset Tracking > Return the Item**



*Fig. 174 Asset Home screen*



*Fig. 175 Asset Return*



*Fig. 176 Asset Sign and Save*

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.

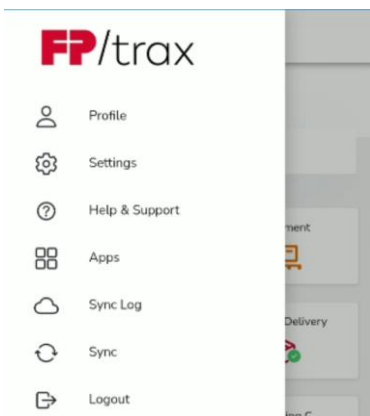
Sign and/or Save.

## 10 Letters

### 10.1 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.

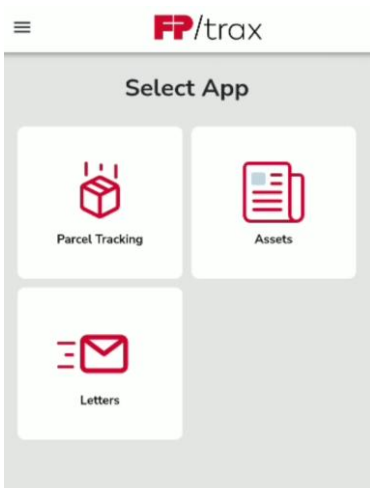
### 10.2 Letter registration (FP Trax mobile app)



#### 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. 1777 Main Menu > Apps*



#### 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. 178 Apps > Module: Letters*



Fig. 179 Input field

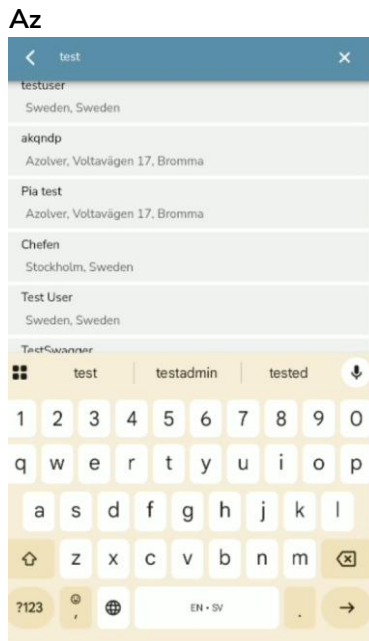


Fig. 180 Recipient drop-down menu

### 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](#)

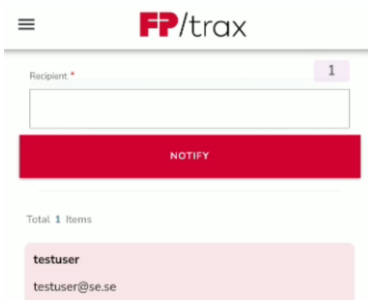


Fig. 181 Recipient added

### 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. [0 Letter Dashboard](#) and [10.4 Search](#)

### 10.3 Letter Dashboard

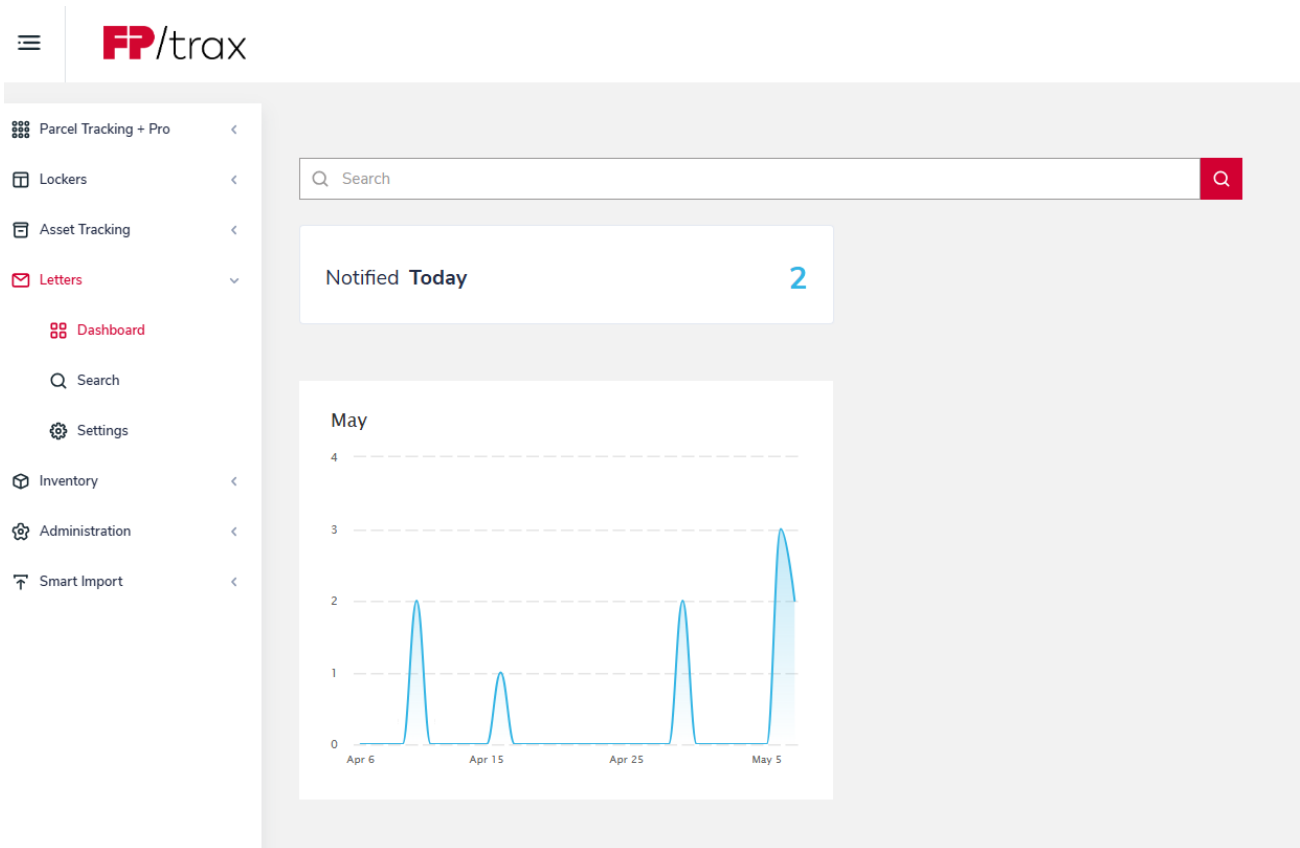


Fig. 182 Letters > Dashboard

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.

### 10.4 Search

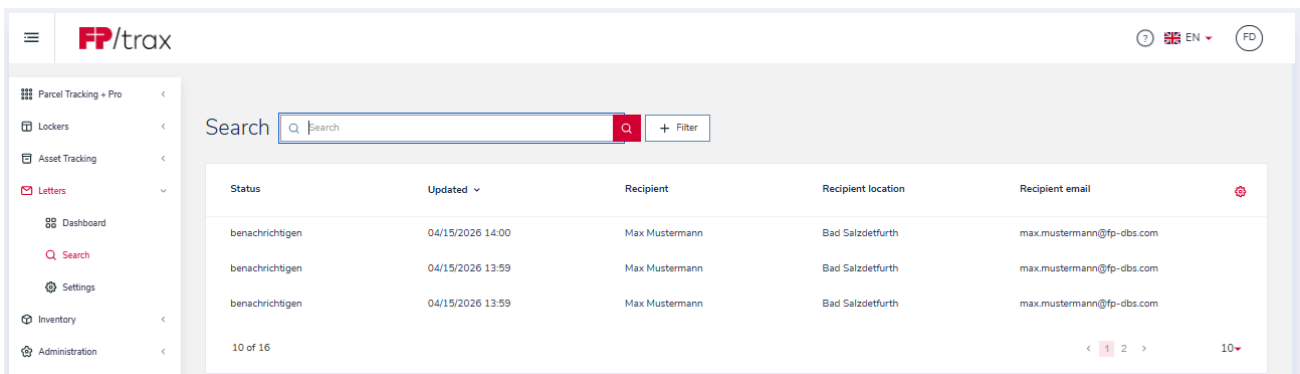


Fig. 183 Letters > Search

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.

#### 10.4.1.1 Overview table > Adjustment of columns

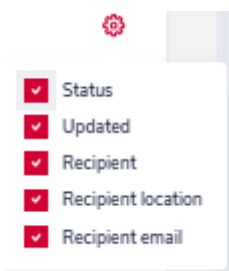
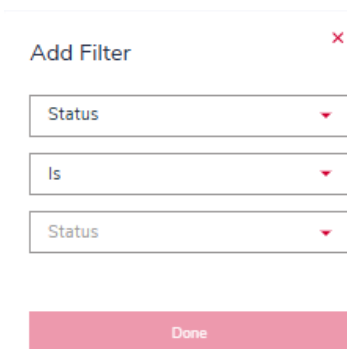


Fig. 184 Selection criteria for letter overview

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.

#### 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. 185 Filter selection Search field

## 10.5 Letters > Settings

### 10.5.1 Settings > Status

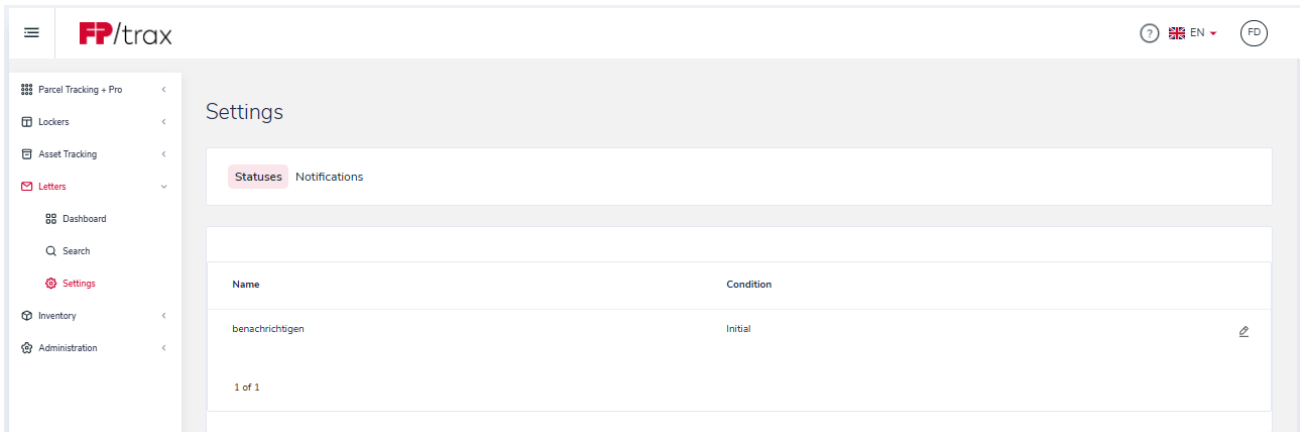


Fig. 186 Letters > Settings > Status

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 Settings > Notifications

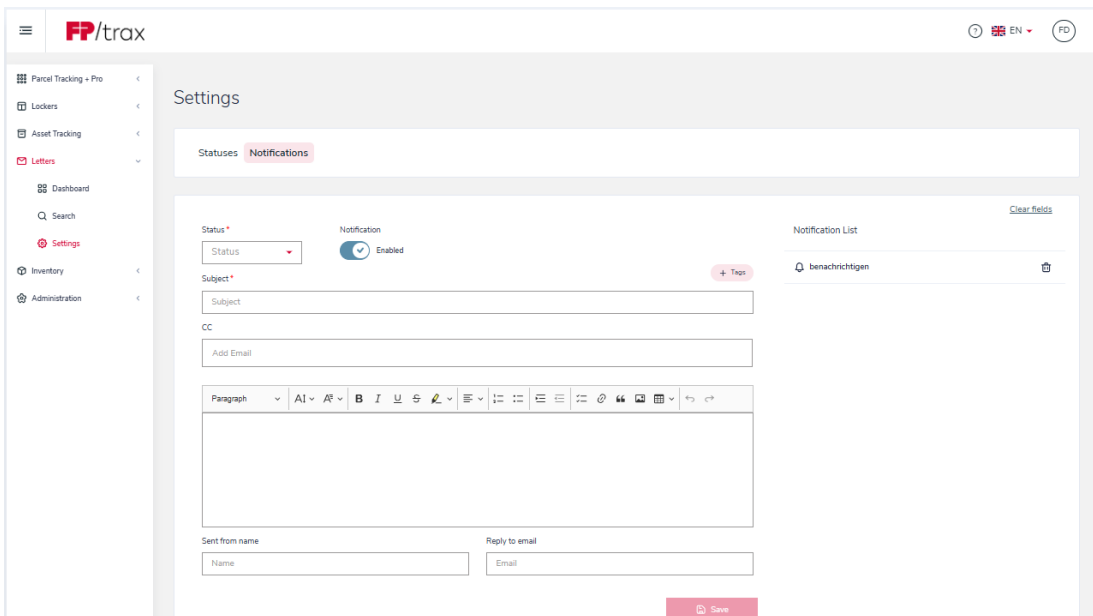


Fig. 187 Letters > Settings > Notifications

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.

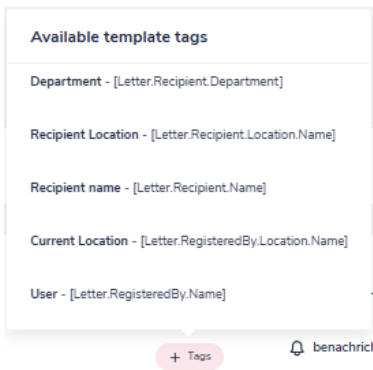


Fig. 188 Selecting keywords for an email

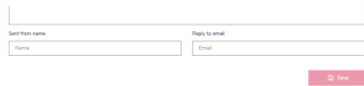


Fig. 189 Sent by and reply to



Fig. 190 Activation button



Fig. 191 List of Email Notifications

## 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.

## 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.

## (De)activate 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 the list of 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 Inventory

### 11.1 General information about the FP Trax Inventory Module

Digitize your warehouse management with **FP Trax** and keep full control of your stock at all times. Visual indicators show you instantly when items need to be reordered, helping you react quickly to changing demand while avoiding both excess stock and shortages.

### 11.2 Inventory > Inventory

The screenshot shows the FP/trax web interface for the Inventory module. On the left is a navigation menu with items like Parcel Tracking, Lockers, Asset Tracking, Letters, Inventory (highlighted), Inventories, and Administration. The main area is titled 'Inventory' and contains a search bar for SKU, a search icon, a filter button, and 'Import' and 'Export' options. Below this is a table with columns: Name, SKU, Description, Location, Quantity, Warning level, and Updated. A 'CREATE' button is visible in the top right of the table area.

Name	SKU	Description	Location	Quantity	Warning level	Updated	
ZEBRA ZD421	ZD421-88778987	-	FP DBS DE	5	1	04/16/2026 16:41	+ - →
ZEBRA ZD421	ZD421-88778987	-	Adlershof (BMC)	2	1	04/16/2026 16:41	+ - →
Datalogic Quickscan	QM2400	-	Adlershof (BMC)	2	1	04/16/2026 15:55	+ - →

Fig. 192 Stock > Stocks

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

#### 11.2.1.1 Inventories > Create a new item

Fig. 193 Stock > Create

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**
- **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. 194 Stock > Search

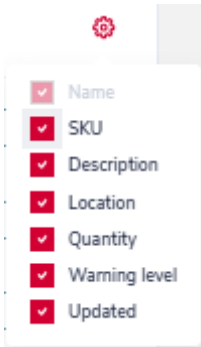
Use the search bar to find and filter assets by entering a term and clicking the magnifying glass or pressing **Enter**. The list will display only matching results or remain empty if none are found.

### 11.2.1.3 Filter inventory list

Fig. 195 Filter selection

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

## 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. 196 Selection criteria for an overview of the stock*

## 11.2.2 Modify inventory

### 11.2.2.1 Change Item Quantity



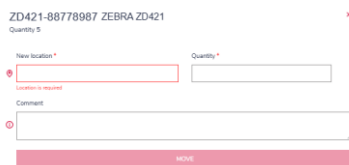
*Fig. 197 Adjust quantity*

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.

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

### 11.2.2.2 Move Location



*Fig. 198 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.

## 11.2.3 Stock item details

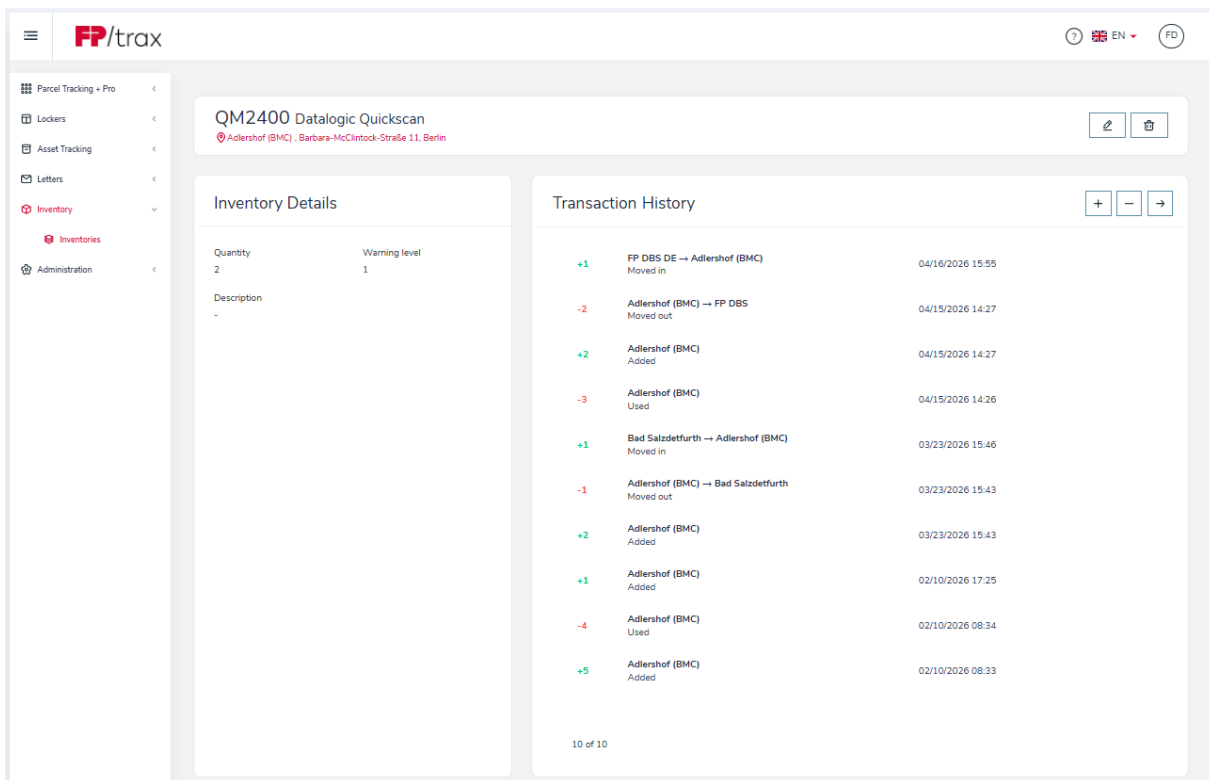


Fig. 199 Detailed view of the existing stock

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

In the detail 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.

### 11.2.3.1 Stock Item Details > Edit Item

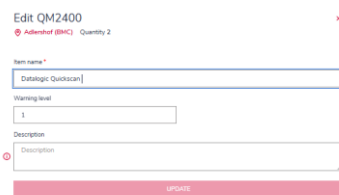


Fig. 200 Edit Item

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.

### 11.2.3.2 Stock Item Details > Delete Item



Fig. 201 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**.

### 11.2.3.3 Inventory Item Details > Transaction Details

Transaction Details		
Quantity	Performed by	Date
-1	FP DBS Admin	04/16/2026 15:55
Info	Location	
umgezogen nach Adlershof	FP DBS DE → Adlershof (BMC)	

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

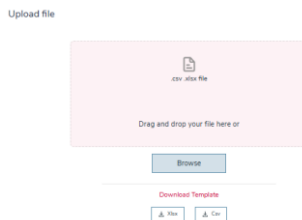
The detail view shows information such as the **quantity**, the **comment** entered during the transaction, any **location changes**, and the corresponding **timestamp**.

*Fig. 202 Item Details > Transaction details*

## 11.2.4 Import and export of inventory data

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

### 11.2.4.1 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**.

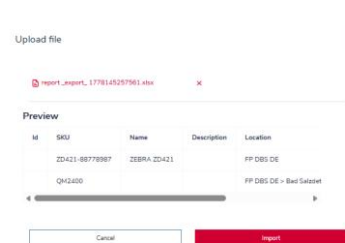
**Note:** To update existing data in the system, please use current **data export**. See also *11.2.4.2 Inventory Data Export*.

*Fig. 203 Data import*

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

*Fig. 204 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. 205 Data Import Preview*

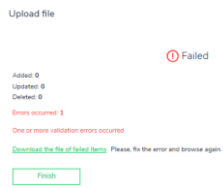


Fig. 206 Error Analysis Import

- 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.

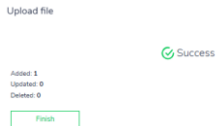


Fig. 207 Successful import

- After a successful upload, a **confirmation message** will be displayed. You can close this message once you have reviewed it. The uploaded **asset data** is then available in the **Search** section of the Asset list, where it can be viewed and edited.

## 11.2.4.2 Inventory Data Export

Please, choose export file format.



Fig. 208 Stock 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.
  - 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 Administration

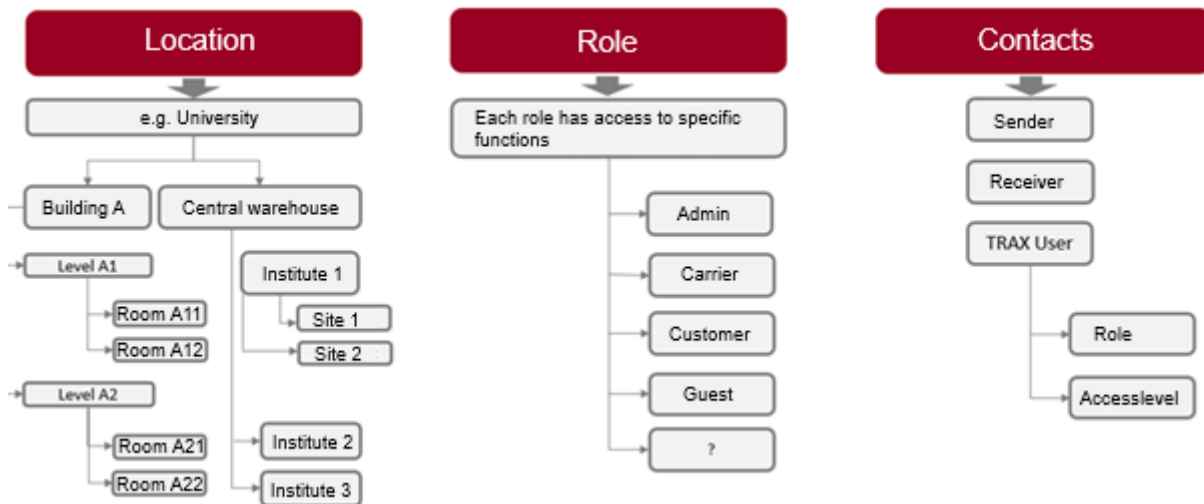


Fig. 209 Management of locations, roles and contacts

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

### 12.1 Contacts

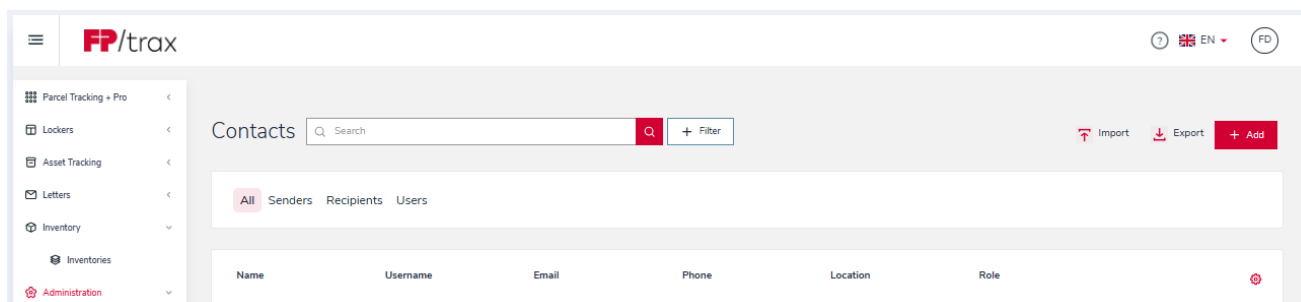


Fig. 210 Management of contacts

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.

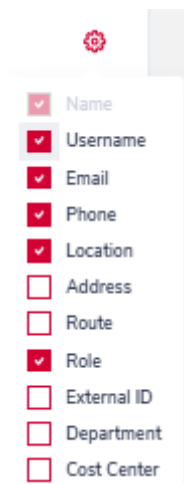
In addition, the contact list can be exported to an Excel or csv document, but can also be imported (cf. [12.1.2 Import and export of contacts](#)) or individual contacts manually (cf. [12.1.1 Add contacts manually](#)) can be added.

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

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

- **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**.
- **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. 211 Column Selection

## 12.1.1 Add contacts manually

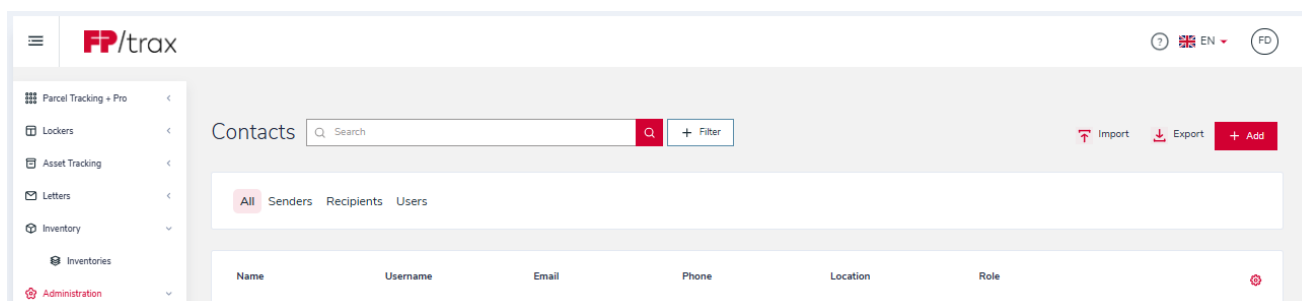


Fig. 212 Management of contacts

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.

### 12.1.1.1 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. 213 Create new sender

### 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
- **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**.

Fig. 214 Create new recipient

### 12.1.1.3 Users

Fig. 215 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 <sup>Pros</sup> = Detailed information about the "mobile profile" can be found under 7.6.4

Mobile Profile Pro

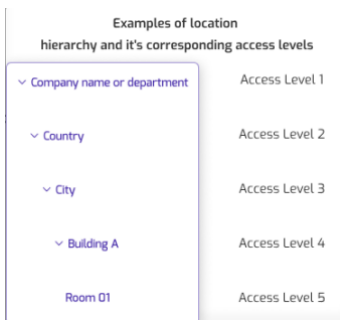


Fig. 216 Example: Location structure and corresponding access rights

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.

### 12.1.2 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.

#### 12.1.2.1 Data import

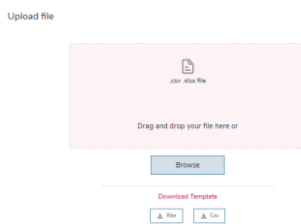


Fig. 217 Data import

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 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. 218 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.

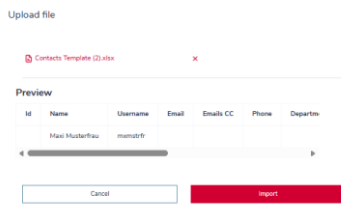


Fig. 219 Data Import Preview

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.

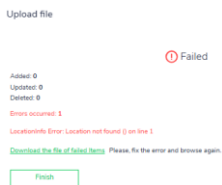


Fig. 220 Error Analysis Import

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.

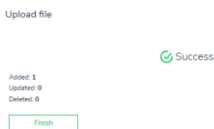


Fig. 221 Successful import

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

### 12.1.2.2 Data export

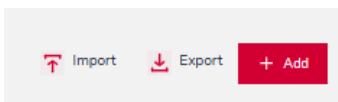


Fig. 222 Import/Export

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*)

### 12.1.2.3 Bulk deletion

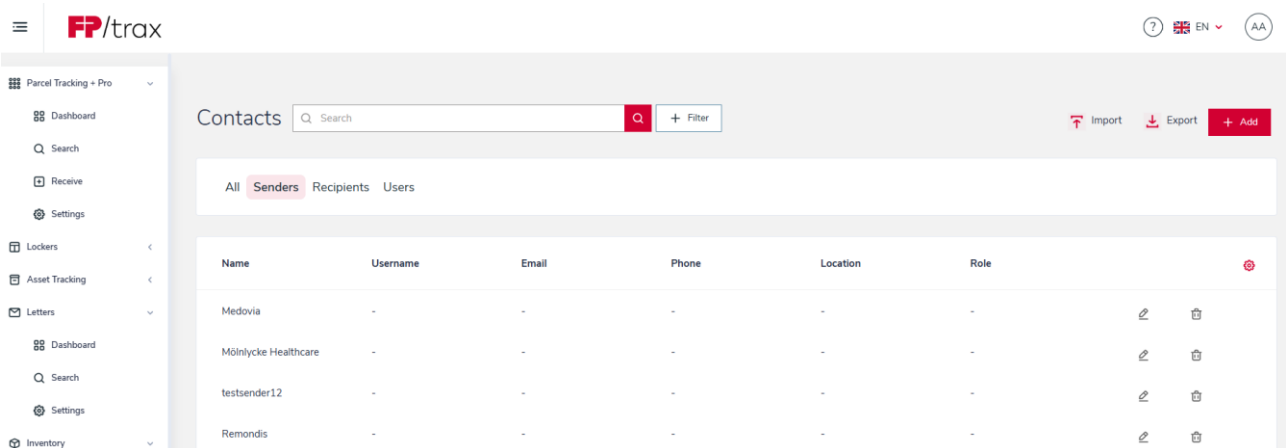


Fig. 223 Export Data

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

J	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O
1	id	Name	Username	Email	Emails CC	Phone	Department	Cost Center	Role	Access Lev	External ID	Code	Location	Address	Route
2	69959032a51307aec6abc8fd	testarapp											Azolver > Sweden	Sweden	Route SE
3	69958f71a51307aec6abc7e6	mijk											Azolver > Sweden	Sweden	Route SE
4	65cfe7a334e8de2571b768	Luna mars											Azolver > Sweden	Sweden	Route SE
5	661ce7ca053fdd103a62cf7b	Ådori											Azolver > Sweden	Sweden	Route SE
6	661ce823053fdd103a62cfaa	daniel											Azolver > Sweden	Sweden	Route SE
7	67c81589e44a142dd8f1983	March Recipient											Azolver > Sweden	Sweden	Route SE
8	687a4b7b36352c1ffb292ab	Offline rcvr											Azolver > Sweden	Sweden	Route SE
9															
10															
11															

Fig. 224 Download Excelfile

Download the excel file, open it in edit mode.

J	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O
1	id	Name	Username	Email	Emails CC	Phone	Department	Cost Center	Role	Access Lev	External ID	Code	Location	Address	Route
2	69959032a51307aec6abc8fd	DELETE											Azolver > Sweden	Sweden	Route SE
3	69958f71a51307aec6abc7e6	DELETE											Azolver > Sweden	Sweden	Route SE
4	65cfe7a334e8de2571b768	DELETE											Azolver > Sweden	Sweden	Route SE
5	661ce7ca053fdd103a62cf7b	DELETE											Azolver > Sweden	Sweden	Route SE
6	661ce823053fdd103a62cfaa	DELETE											Azolver > Sweden	Sweden	Route SE
7	67c81589e44a142dd8f1983	DELETE											Azolver > Sweden	Sweden	Route SE
8	687a4b7b36352c1ffb292ab	DELETE											Azolver > Sweden	Sweden	Route SE
9															
10															
11															

Fig. 225 change data

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

Save the file.

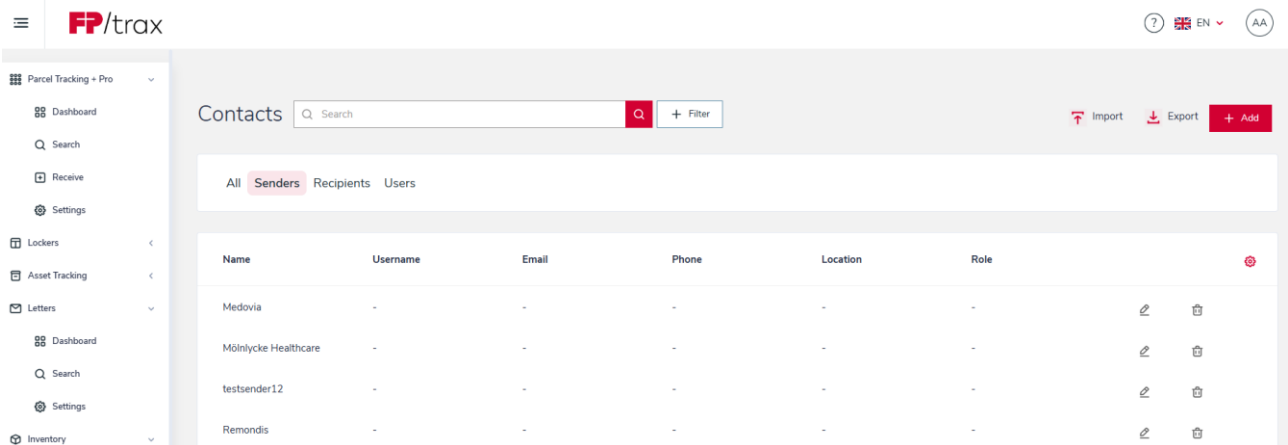
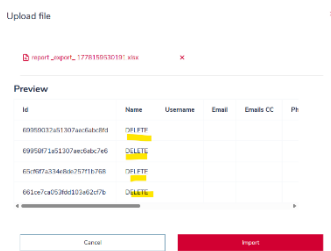


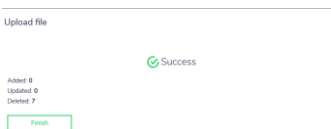
Fig. 226 Import

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



Click **Import** button.

Fig. 227 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. 228 Import successful

## 12.2 Roles

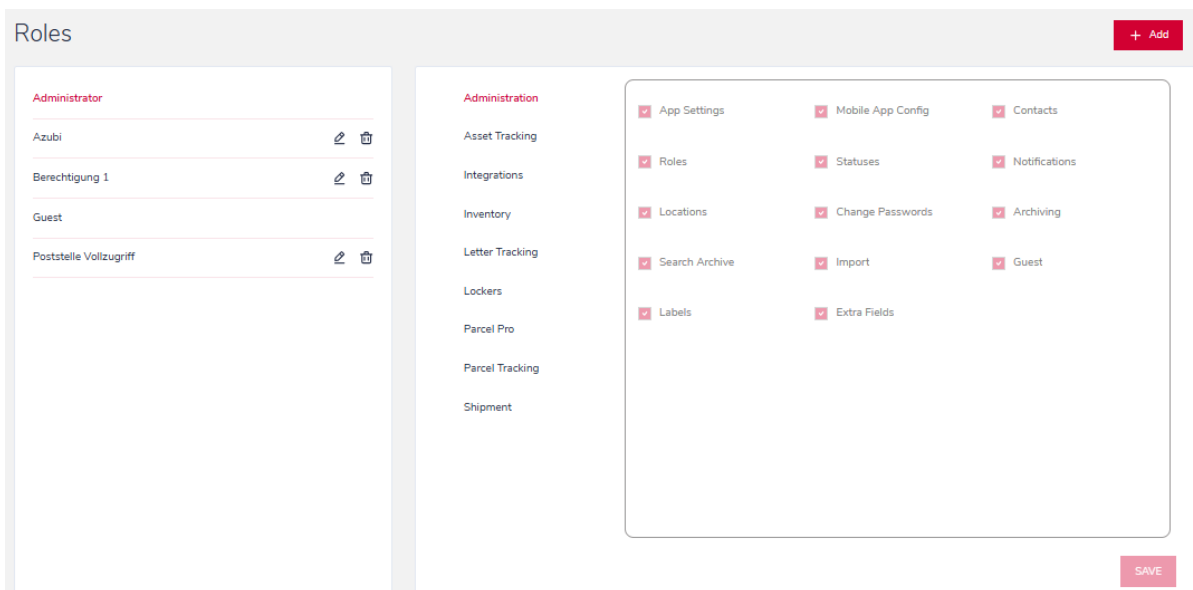
When you first set up the system, two roles are already included:

- **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.
- **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.

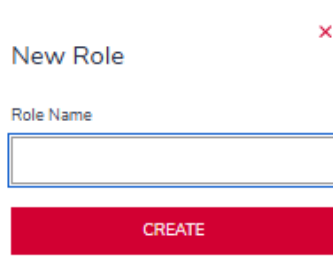
Only **one role** can be assigned to each user.

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. 229 Role assignment to module and function*

### 12.2.1 Create, edit, and delete roles



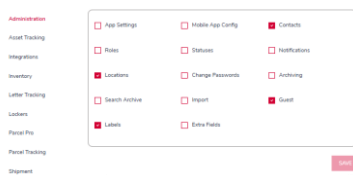
To create a new role, click on the "Add" button and assign a unique role name. Then click on the "create" button. The role is created and listed in the list of roles.

Fig. 230 New role > Role designation



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

Fig. 231 Edit and delete roles >



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**.

Fig. 232 Authorization assignment at module level

## 12.2.2 Roles and permissions

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

### 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

#### 12.2.2.2 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

#### 12.2.2.3 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

#### 12.2.2.5 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

#### 12.2.2.6 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

### 12.2.2.7 Shipment bundling

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

## 12.3 Locations

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

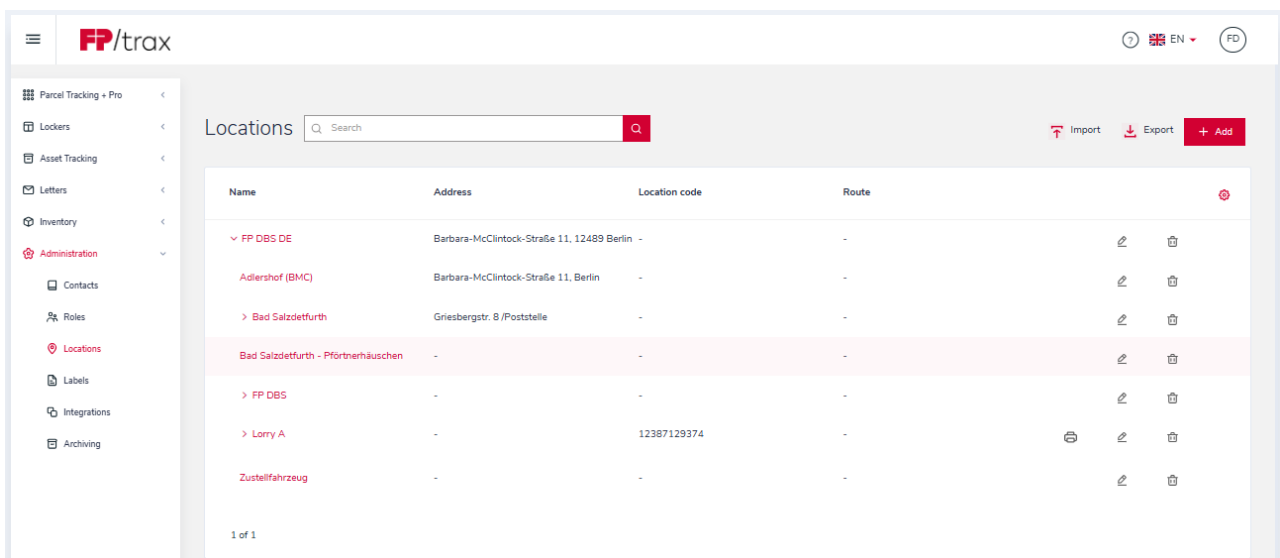


Fig. 233 Overview Locations

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. 234 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*.

## 12.4 Labels

FP Trax uses three types of labels:

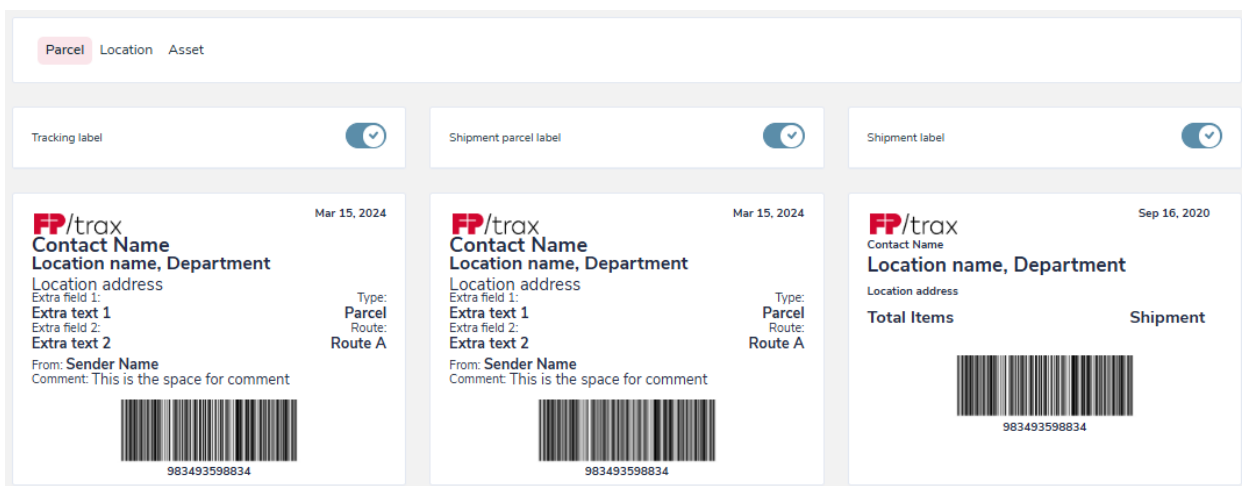
- **Parcel labels** – used for shipment tracking
- **Location labels** – used to identify specific locations
- **Item labels** – used for asset tracking

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 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. 235 Overview of parcel labels*

#### 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 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 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 Location label

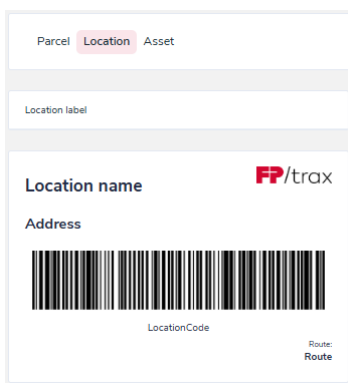


Fig. 236 Location label

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.

## 12.4.3 Asset label

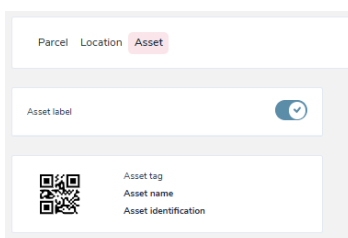


Fig. 237 Asset label

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.

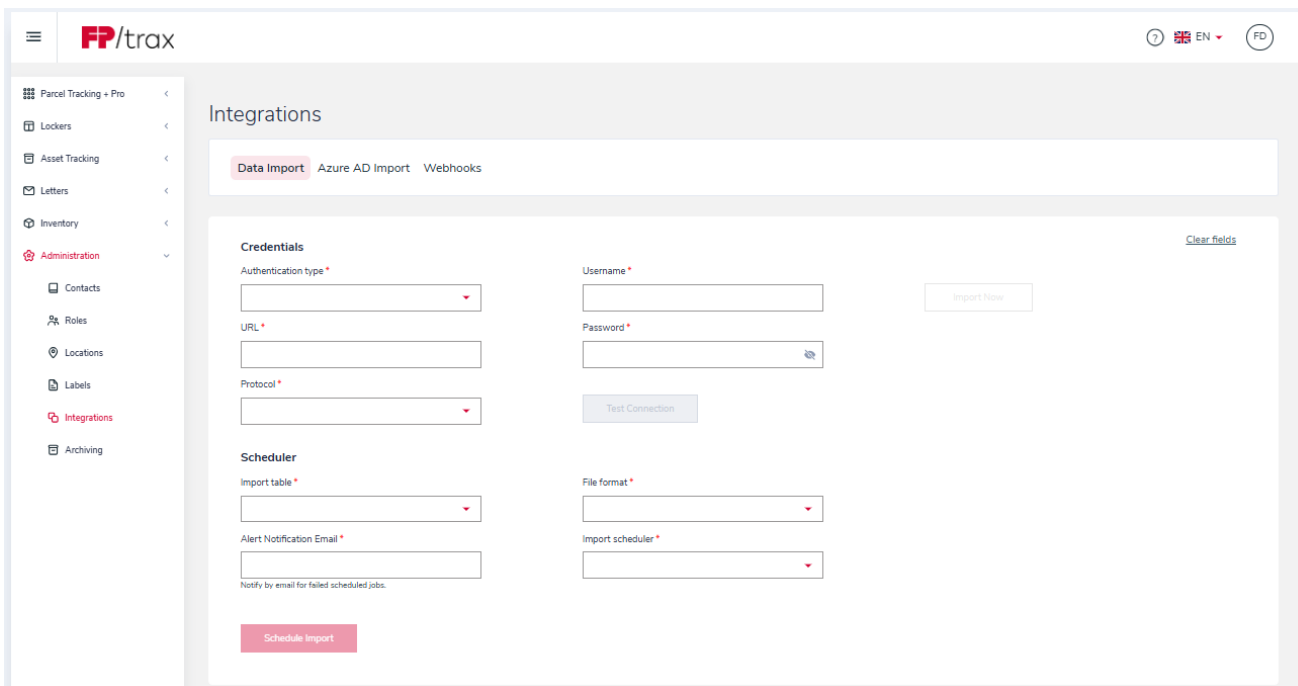
The **asset label** includes a **QR code**, the **asset number**, the **designation (name)**, and, if provided, the **identification details** entered during registration.

## 12.5 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 Integrations > Data Import



*Fig. 238 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](mailto:support@traxsuite.com)

## 12.5.2 Integrations > Azure AD/Entra ID Import

Fig. 239 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

- **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.

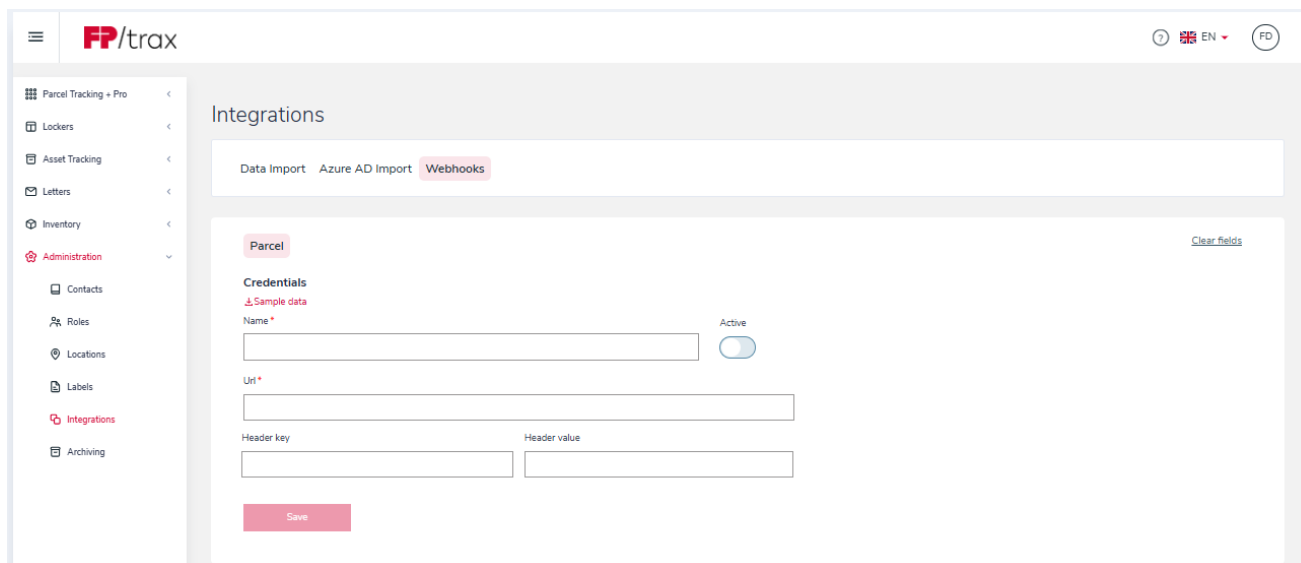
Once the setup is complete, it will appear on the **right side of the screen**. You can click an entry in the list to **view and edit** its settings.

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](mailto:support@traxsuite.com)

### 12.5.3 Integrations > Webhooks



*Fig. 240 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](mailto:support@traxsuite.com).

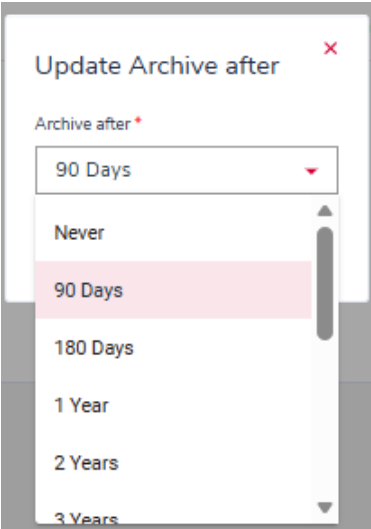
## 12.6 Archiving

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. 241 Setting an Archiving Period

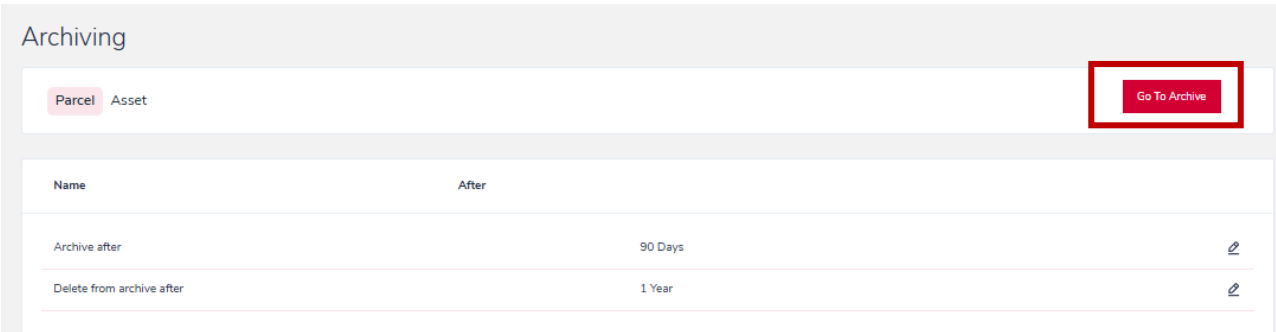


Fig. 242 Archiving

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

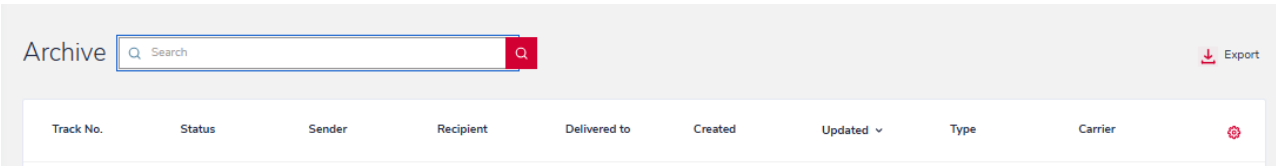


Fig. 243 Filter Archive

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.

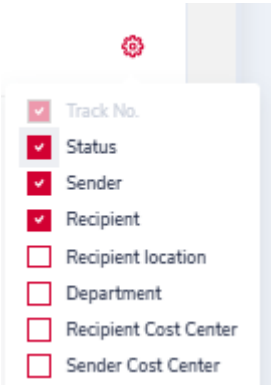


Fig. 244 Selection criteria for the overview

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

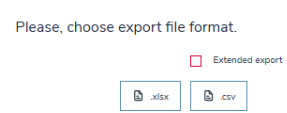


Fig. 245 Export archive file

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.