FEDEX Integration - Setup

Available in SERP and SACC from 2019-11-##

FedEx Corporation is an American multinational courier delivery services company.

In order to maintain the expected performance of a production environment, the following thresholds need to be met.

Main Functionality

• To integrate FedEx's functionality with Standard ERP to conduct delivery orders.

• FedEx offers global reach to a worldwide network in regions outside the U.S. including: Canada; Asia Pacific (APAC); Europe; Middle East; Indian Subcontinent and Africa (MEISA); and Latin America and the Caribbean (LAC).

Settings

Part 1: How To Setup

System Setup

1. Fill in the sender information in module System >> Settings >> Company Info.

0	SAMPLE: Company Info: Update
	Sav
Company Name	٠
Business Name	l
	Address Reg Email Fonts
Address 1	1234 Main
Address 2	Apt #567
City	Irving
State	<u>TX</u>
Zip	75060
Telephone	Fax
	Taxonomy Type
	None Solic Base or International Associating Standards
	M - SNC Micro-entities
	N - IAS/IFRS
	O - Other accounting

- Address line 1: address text
- Address line 2: address text
- Address line 3: town/city
- Address line 4: state
- Address line 5: zip code

NB: The contact you are shipping to must have the same address format defined on the Contact card in CRM >> Registers >> Contacts.

2. In module Stock >> Settings >> Freight Companies, fill in the necessary fields outlined below.

• • •	Test: Freight Company: New
< >	Create 🗸 Cancel Save 🔨 🔀 🧔
Code	FEDEX
Name	
Supplier	
Reg. No.	
Truck Information	
Driver	
CMR Text	
	WebService connection
Type	FedEx Live Mode
Security Key	1234567890
Password	1234567890
Account Number	12345 Meter number 67890
Del. Signature req.	None

Mandatory fields:

- Code: FEDEX

Enter the following information in the WebService connection section, then Save the record:

- Type: paste special to FedEx
- Security Key
- Password
- Account Number
- Meter Number

NB: If you are testing, please do not tick the 'Live Mode' checkbox.



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3. In module Stock >> Settings >> Pack Type, specify the proper dimensions of the boxes that you have, the correct measurement type, then Save the record.

< >	Create ~	Cancel Save	► X (
Code AN	IYTH		
Comment FE	DEX_MEDIUM_BOX		
Width	3.00	Length	4.00
Height	5.00	Measurement	Imperial (lb/in)

FedEx Specific Pack Types

The following pack types are specific to FedEx:

- FEDEX_SMALL_BOX
- FEDEX_MEDIUM_BOX
- FEDEX_LARGE_BOX
- FEDEX_EXTRA_LARGE_BOX
- FEDEX_PAK
- FEDEX_TUBE
- FEDEX_ENVELOPE

To specify these specific pack types (defined above), in the Pack Type window:

- Code: can be anything
- Comment: must specify the pack type exactly as written above

Leave all other fields blank and Save.

For example, to use a FedEx Medium Box:

- Code: anything
- Comment: FEDEX_MEDIUM_BOX

Save the record.

Part 2: Workflow

1. Create Sales Order with Items. OK and Save.

				_							
	No. 1		P Na	me Test							
Cus	tomer 1		Official	No						🗹 ОК	
		Term	s Items	Currency	Del. Terms	Price List	Inv. Address	Del. Ado	dress		
	Dat	te 20/11/201	9 Our I	eference	Test		Salesmar	n TEST		Closed	
Pay	ment Term	ns 1		Attention			Projec	t		Reserved	Ŀ
Plan	ned Deliver	y 20/11/201	9 Tag	s/Objects			Order Class				
De	spatch Dat	te		eference			Order Type	Normal			
De	spatch Tim	e	Cust	Ord. No.			Sales Contrac	t			
	Item	Qty	Description				Unit Price	%	Sum	4	A
1	1	1	Test Item							0.00	В
2											С
3											D
4											E
5											
6											F O
7											G
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10									_		
11									_		
12									_		
10											
14									-		
40											
urrenc	y	GP %	0.0	Reverse \	/AT	VAT		Subtotal		0.00	
		Total GP	0.00	Ext. Tax		Base		TOTAL		0.00	

2. From the Sales Order, create a Delivery.

Create ~	Cancel	Save	*
New Ord	er		ЖN
Duplicate	9		ЖY
Workflow	Activity		公 # C
Delivery			₩ L
Down Pag	yment Inv	oice	
Email			ΩжМ
Invoice			ЖF
Project			
Project B	udget		
Purchase	Order		
Returned	Goods		ЖB
Stock Mo	vement		
Add Cust	omer		
Add Item			
POS Invo	ice		



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3. On the Freight tile, select Freight Company 'FEDEX' from paste special and Save.

					Create .	Cancer Sav	•			
No. 102	7	Nam	e Morris Mel	odies						
Customer 100	В	Official No	o		TREO	No			OK	
	Terms	Items	Del. Terms	Packaging	Del. Addres	s Comment	Freight			
Freight Compan	y FEDEX	P						Define Pa	ckages	
Nam	e									
Reg. No										
Truck Informatio	n									
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Result: Service Type field will display.

- 4. In the Service Type field, select the appropriate service from FedEx and Save.
- 5. Select 'Define Packages', and specify the:
- QTY
- Pack Type
- If dimensions were not predefined with Pack Type, specify the:
- Weight (use less than 50, for example, as FedEx has requirements)
- Declared Value

Save and close the window.

6. OK the Delivery record and Save.

7. From the Operations Menu, select 'Register Electronic Shipment'.

Result: Labels will be created and attached to the Document Manager of the Delivery record.

