

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.

SAMPLE: Company Info: Update

Company Name _____
Business Name _____

Address Reg Email Fonts

Address 1 1234 Main _____
Address 2 Apt #567 _____
City Irving _____
State TX _____
Zip 75060 _____
Telephone _____ Fax _____

Taxonomy Type
 None
 S - SNC Base or International Accounting 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 _____

Wbservice 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 Wbservice 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.

Code	ANYTH		
Comment	FEDEX_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.

Item	Qty	Description	Unit Price	%	Sum	
1	1	1 Test Item			0.00	B
2						C
3						D
4						E
5						F
6						G
7						H
8						
9						
10						
11						
12						
13						
14						
15						

2. From the Sales Order, create a Delivery.

- Create ▾
- Cancel
- Save
- New Order ⌘ N
- Duplicate ⌘ Y
- Workflow Activity ⇧ ⌘ C
- Delivery ⌘ L**
- Down Payment Invoice
- Email ⇧ ⌘ M
- Invoice ⌘ F
- Project
- Project Budget
- Purchase Order
- Returned Goods ⌘ B
- Stock Movement
- Add Customer
- Add Item
- POS Invoice

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

Item	Description	Cust. Item No.	Ordered	Avail.	Del. Qty
1 10101	Flute		2	428	2
2 10103	Trumpet		2	5	2
3 10104	Clarinet		2	6	2
4 10105	Saxophone		3	3	3
5 20101	Violin		5	56	5
6 20104	Double Bass		1	54	1
7 40102	Snare Drum		1	92	1
8 40109	Xylophone		1	7	1
9					

Total Qty 17

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.