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If you generate an inaccurate invoice, FedEx may bill or refund to you the difference according to the FedEx Service Guide, tariff service agreement or other terms or instructions provided to you by FedEx from time to time. A request for refund on a FedEx shipment must be made in accordance with the applicable Service Guide or terms or instructions provided by FedEx from time to time. A shipment given to FedEx with incorrect information is not eligible for refund under any FedEx money-back guarantees. FedEx may suspend any applicable money-back guarantees in the event of equipment failure or if it becomes inoperative.

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Disclaimer
All Improper Transaction scenarios are for example only. They do not reflect all error condition scenarios.
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ABOUT THIS DOCUMENT

This guide describes how to install FedEx Ship Manager® Server (FSMS) and perform the initial configuration required to enable FSMS to communicate with FedEx so that you can begin shipping. It includes detailed procedures on how to set up the server environment for FSMS, install the software, register a meter, configure the software for initial use, and uninstall FSMS.

Organization

To help you understand the shipping services provided by FSMS to automate your shipping operations, the following sections are provided as part of this guide.

• Installation of FedEx Ship Manager Server - see Chapter 1
• Configuration of FedEx Ship Manager Server - see Chapter 2
• FedEx Rate and Data Downloads - see Chapter 3
• Backing Up and Restoring Local FedEx Data - see Chapter 4

Audience

This guide is intended for the person who will install and configure FSMS. You must have a basic understanding of how to set up network connectivity and administer MicroSoft Windows. Note that some tasks in the guide require field level access privileges to the FSMS Configuration Utility.

Conventions

This guide uses the following conventions in the text.

• Simple transaction code is formatted in Courier New.
• Important notices begin with the word “Note.”
• In task instructions, software user interface elements are shown in bold.
• Names of documents are shown in italics.
• Names of FSMS transactions are shown in italics, as for example, the 020/120 Global Ship Request/Reply.
• First occurrence of a term is italicized followed by a definition.

Resources

The following documents contain information related to this reference guide:

• FedEx Ship Manager® Server Technical What’s New Guide
• FedEx Ship Manager® Server Services and Shipping Guide
• FedEx Ship Manager® Server Developer Guide
• FedEx Ship Manager® Server Transaction Coding Reference Guide
**Support**

For FSMS technical support, call 1.877.339.2774 and state “FedEx Ship Manager Server” at the voice prompt.

Support hours are Monday through Friday, 7:00 a.m. to 9:00 p.m. CST, and Saturday, 9:00 a.m. to 3:00 p.m. CST.

For international customer support, call 1.800.GoFedEx 1.800.463.3339.

You can also contact FedEx on the web at [fedex.com](http://fedex.com).

Note: Customers using a FedEx® Compatible Solutions Program automation solution should contact their software provider for support.

**FedEx Website**

For the most up-to-date information about FedEx, click [fedex.com](http://fedex.com) at the top of the FedEx Ship Manager® screen to go to the FedEx website, then click on any link to explore the most recent features and news from FedEx.

**FedEx Service Guide**

Within this guide, you may be asked to refer to the FedEx Service Guide at [fedex.com](http://fedex.com) for details about FedEx services, packaging, and other information. To view or download the guide, go to [fedex.com](http://fedex.com), enter “FedEx Service Guide” in the Search box at the top of the page, and then click Go.

**FedEx EEI Filing Options (U.S. only)**

If you are a U.S. shipper and your U.S. export shipments require EEI filing (Electronic Export Information, formerly known as Shipper's Export Declaration, SED) refer to the FedEx EEI Filing Options Guide. To view or download the FedEx EEI Filing Options Guide, go to [fedex.com](http://fedex.com), enter FedEx EEI Filing Options Guide in the Search box at the top of the page, and then click Go. To order a printed copy, call 1.800.GoFedEx 1.800.463.3339.
## REVISION HISTORY

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<th>Release No.</th>
<th>Page No.</th>
<th>Description of Correction</th>
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<tbody>
<tr>
<td>Chapter 1. Table 1-4. Clarification required.</td>
<td>10.6.1</td>
<td>1-5</td>
<td>Added, &quot;These steps are Operating System dependent.&quot; to FSMS Application Services section in table.</td>
</tr>
<tr>
<td>Chapter 1. Section, &quot;Setting Windows Administrator User Rights&quot;. Clarification required.</td>
<td>10.6.1</td>
<td>1-6, 1-7</td>
<td>Added statement, “These steps are Operating System dependent.” to Step 1.</td>
</tr>
<tr>
<td>Chapter 4. Added sentence to end of first paragraph, &quot;It is important to monitor and plan the temp file size based on your purging schedule to ensure that the storage needed for temp files is large enough to accommodate the history being tracked.&quot;</td>
<td>10.6.1</td>
<td>4-1</td>
<td>Revised text. From 10.0.1 comments.</td>
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</table>
CHAPTER 1: INSTALLATION OF FEDEX SHIP MANAGER SERVER

FedEx Ship Manager® Server (FSMS) is a network shipping solution for customers who want to integrate FedEx® shipping capabilities into their shipping operation.

FedEx Ship Manager Server is for technologically advanced shippers who need to process, label and ship large numbers of packages. FedEx Ship Manager Server software allows full integration of the FedEx service modules — tracking, rating and routing — with a company’s existing computer systems. FedEx Ship Manager Server provides the following shipping functions:

- Ship to and from any FedEx service location
- Track any package shipped using FSMS, or shipped using any other FedEx automated solution, or shipped using manual or pre-printed air waybills
- Route using Universal Routing and Sorting Aid (URSA) for FedEx Express® shipments and ZIP/postal codes for FedEx Ground® shipping
- Rating for any U.S. or Canada-based account number

FedEx Ship Manager Server is a transaction-based shipping solution. FedEx provides all the transactions needed to streamline your shipping operations. You can even build your own user interface that is customized to your business needs. See the FedEx Service Guide for more information about shipping and the FedEx services available to meet all your shipping needs.

Note: To integrate FSMS software with your business information technology solutions, you need dedicated IT resources to program shipping transactions and establish network connections. For more information, go to the Developer Resource Center at fedex.com or fedex.com/developer.

This chapter describes how to install FSMS software on your system. FedEx Ship Manager uses the InstallShield Wizard to guide you through the program setup process. To get started with installing FSMS, please review “System Requirements” on page 1-2.
System Requirements

Before you begin installing FSMS, be sure you have reviewed the guidelines that describe computer system requirements and supported printers, servers and scales. See Table 1-1 for minimum software and hardware requirements.

Minimum Software and Hardware Requirements

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<td></td>
</tr>
<tr>
<td>Note: This version of FedEx Ship Manager® Server is designed to work best on Windows 2003 and higher. Microsoft ends support for Windows 2000 on July 13, 2010. FedEx recommends that you upgrade to ensure your systems are not at risk. See the Microsoft website: <a href="http://support.microsoft.com/ph/1131">http://support.microsoft.com/ph/1131</a></td>
</tr>
<tr>
<td>Minimum Hardware Requirements</td>
</tr>
<tr>
<td>Processor</td>
</tr>
<tr>
<td>Memory</td>
</tr>
<tr>
<td>Hard Drive</td>
</tr>
<tr>
<td>Network adapter</td>
</tr>
<tr>
<td>CD ROM drive</td>
</tr>
<tr>
<td>Modem</td>
</tr>
<tr>
<td>Ambient Temperature</td>
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</table>
Recommended Software and Hardware Requirements

Table 1-2 lists recommended software and hardware requirements.

<table>
<thead>
<tr>
<th>Table 1-2: FedEx Ship Manager Server Recommended Software and Hardware</th>
</tr>
</thead>
<tbody>
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<td><strong>Software Requirements</strong></td>
</tr>
<tr>
<td>Operating System</td>
</tr>
<tr>
<td>Windows® 2008 Server (32 bit)</td>
</tr>
<tr>
<td>Windows® 2008 Server (64 bit)</td>
</tr>
<tr>
<td>Windows® 7 Business (32 bit)</td>
</tr>
<tr>
<td>Windows® 7 Business (64 bit)</td>
</tr>
<tr>
<td>Windows® 2008 R2 Server (64 bit)</td>
</tr>
<tr>
<td>Operating Systems that facilitate Microsoft failover / high availability Clustering:</td>
</tr>
<tr>
<td>• Windows Server 2003 R2 Enterprise (with iSCSI initiators)</td>
</tr>
<tr>
<td>• Windows Server 2008 R2 Enterprise (iSCSI is included)</td>
</tr>
<tr>
<td>Compatible Hypervisors that FedEx Ship Manager® Server supports (Virtualization lets you replicate multiple servers on a single machine, requiring less hardware):</td>
</tr>
<tr>
<td>• VMware ESX 3.5 and greater</td>
</tr>
<tr>
<td>• VMware VSphere 4 and greater</td>
</tr>
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</table>

<table>
<thead>
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<th><strong>Hardware Requirements</strong></th>
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</thead>
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<tr>
<td>Processor</td>
</tr>
<tr>
<td>2.5 GHz or higher XEON processor</td>
</tr>
<tr>
<td>Memory</td>
</tr>
<tr>
<td>2 GB RAM</td>
</tr>
<tr>
<td>Hard Drive</td>
</tr>
<tr>
<td>36 GB or larger</td>
</tr>
<tr>
<td>Network adapter</td>
</tr>
<tr>
<td>100/1000 Mbps</td>
</tr>
<tr>
<td>CD ROM drive</td>
</tr>
<tr>
<td>Windows-compatible</td>
</tr>
<tr>
<td>Ambient Temperature</td>
</tr>
<tr>
<td>60 to 70 degrees Fahrenheit</td>
</tr>
</tbody>
</table>

Note: FedEx does not maintain and support customer’s virtual or clustered environments.

Supported Hardware

Servers

- HP Server Tower
  - HP Proliant ML 310
  - HP Proliant ML 310 G4
  - HP Proliant ML 310 G5
  - HP Proliant ML 310 G6
  - HP Proliant ML 330 G3
- HP Server Rack
  - HP Proliant DL 360 G3
  - HP Proliant DL 360 G4
  - HP Proliant DL 360 G5
Chapter 1: Installation of FedEx Ship Manager Server

- HP Proliant DL 360 G6
- Non-HP
  - Dell PowerEdge SC 440 (Tower)
  - Dell PowerEdge 1950 (Server Rack)

FedEx does not support any other server models.

**Thermal Printers**

- EPL printers
  - Zebra 2348 Plus
  - Zebra 2844
- ZPL printers
  - ZM 400 Printers
  - Zebra Z4 M Plus
  - Zebra ZP 500
  - Zebra ZP 500 Plus

**Dot Matrix Printers**

- Lexmark 2480
- Lexmark 2580

**Laser Printers**

- HP LaserJet P 2015
- HP LaserJet P 2035
- HP LaserJet 1160
- HP LaserJet 1300

**Scales**

- Serial/USB
  - Mettler Toledo PS60
  - Mettler Toledo PS90

**Network and Internet Connectivity Requirements**

The server must have a network connection that provides Internet connectivity. The following items are required for connectivity:

- The server running the software application must be configured for the TCP/IP protocol.
- Winsock must be loaded on the server.
- The server must have a network connection.

Your local network security policies might require you to perform special configurations on the server where you install FSMS. For example, if you use a proxy server to access the Internet, you must make sure that the proxy server settings are configured on your FSMS server.

Note: When configuring your initial settings, the **User Level - View** access privilege is used to enable SmartPost. See “Privileges and Access” on page 2-1 for more information.
Before You Begin

Although the installation program takes only a few minutes to complete, there are some important steps you must take before you begin installing FSMS. Be sure to review the information in these topics:

- Creating Your FedEx Account
- Creating a Windows Administrator Account for FedEx Ship Manager Server
- Setting Windows Administrator User Rights
- Securing Your System and Password
- Entering Your CSP Solution Type (for FedEx CSP users only)

Note: Verify that the devices you plan to use to access FedEx shipping services and to print labels meet the recommended FSMS software and hardware requirements.

Pre-Installation Checklist

Complete the pre-installation checklist in Table 1-3 before you begin installing the FSMS software.

<table>
<thead>
<tr>
<th>Action</th>
<th>Who</th>
</tr>
</thead>
<tbody>
<tr>
<td>FedEx Account</td>
<td>Windows Admin</td>
</tr>
<tr>
<td>If you are a new FedEx shipper, sign up for a FedEx account at fedex.com or contact a FedEx representative for assistance at 1.800 Go FedEx 1.800.463.3339. You need an account number to register for a FedEx Ship Manager® Server (FSMS) meter number and to use FedEx shipping services.</td>
<td>Windows Admin</td>
</tr>
<tr>
<td>Windows Administrator Account</td>
<td>Windows Admin</td>
</tr>
<tr>
<td>Verify that the devices you plan to use to access FedEx shipping services and print labels meet the FSMS software and hardware requirements.</td>
<td>Windows Admin</td>
</tr>
<tr>
<td>Verify that the computer you plan to use to run the FSMS application has a Windows Administrator account for installing and running the FSMS software.</td>
<td>Windows Admin</td>
</tr>
<tr>
<td>Verify that the Windows Administrator account that you use to install and run FSMS has the Log on as a service user right. This enables the User Level - View access level.</td>
<td>Windows Admin</td>
</tr>
<tr>
<td>FTP and Network Connections</td>
<td>Windows Admin</td>
</tr>
<tr>
<td>If you plan to use File Transfer Protocol (FTP) to transfer data between FedEx Ship Manager clients and your FSMS application, install an FTP server such as Internet Information Server (IIS) before you install FSMS. Contact your FedEx customer service representative if you need assistance. Make sure each server is configured with a static IP address. Instructions for setting up an IP address are provided as part of Microsoft Help and Support. If you need additional assistance, access the Microsoft website at microsoft.com.</td>
<td>Windows Admin</td>
</tr>
<tr>
<td>CSP Installation and Solution Type</td>
<td>Windows Admin</td>
</tr>
<tr>
<td>The FedEx® Compatible Solutions Program (CSP) integrates FedEx shipping capability with many popular business software systems. The CSP Solution Type code is a three-digit number that corresponds to the specific CSP software you are using. This code is required to be entered during installation when FSMS is used with CSP software. If you do not have a CSP Solutions Type, contact your CSP software provider to request the code. <strong>CSP Providers:</strong> Please contact the FedEx Compatible Solutions team at <a href="mailto:CSPsupport@corp.ds.fedex.com">CSPsupport@corp.ds.fedex.com</a> to get the code for your solution type.”</td>
<td>Windows Admin</td>
</tr>
</tbody>
</table>
Chapter 1: Installation of FedEx Ship Manager Server

**Recommendations**

- Always select **Yes** if the installation script asks if a file should be overwritten at the Read Only File Detected prompt.
- Close all applications including Windows Explorer before you install or uninstall FSMS.
- If prompted to restart your computer, please follow the instructions.

**Post-Installation Checklist**

Complete the post-installation checklist in Table 1-4 after you install the FSMS software.

<table>
<thead>
<tr>
<th>√</th>
<th>Action</th>
<th>Who</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td><strong>Meter Number Registration</strong></td>
<td>FSMS Admin</td>
</tr>
<tr>
<td></td>
<td>If you do not choose to launch the Meter Registration Utility at the end of your installation, launch it at any time afterwards using the icon in the FedEx Ship Manager® Server (FSMS) folder on your desktop. You cannot use the FSMS shipping services without a meter number.</td>
<td>FSMS Admin</td>
</tr>
<tr>
<td></td>
<td><strong>FedEx Ship Manager Server Application Services</strong></td>
<td>FSMS Admin</td>
</tr>
<tr>
<td></td>
<td>The FSMS application services start automatically. To verify that these server processes are starting, select <strong>Start &gt; Control Panel &gt; Administrative Tools &gt; Services</strong>. Note: These steps are Operating System dependent.</td>
<td>FSMS Admin</td>
</tr>
<tr>
<td></td>
<td><strong>FedEx Ship Manager Server Configuration</strong></td>
<td>FSMS Admin</td>
</tr>
<tr>
<td></td>
<td>Configure FSMS by specifying options and services specific to your installation, as described in this chapter.</td>
<td>Windows Admin</td>
</tr>
<tr>
<td></td>
<td>Verify that the server that runs the FSMS application is connected to a network and can access the FedEx shipping server over the Internet. See &quot;Verifying Communications Using the CommSetup Utility&quot; on page 2-58 for more information.</td>
<td>Windows Admin</td>
</tr>
</tbody>
</table>

**Creating Your FedEx Account**

A FedEx account number is required for all FedEx shipping. If you are a new FedEx shipper, it is convenient to sign up for your FedEx account before you install the FSMS software. After you complete your installation, register for a meter number as part of the installation process, then you can use FedEx shipping services immediately.

If you are a new FedEx shipper, sign up for a FedEx account at [fedex.com](http://fedex.com) or contact a FedEx representative for assistance at **1.800 GoFedEx 1.800.463.3339**.

**Creating a Windows Administrator Account for FedEx Ship Manager Server**

You must create a Windows Administrator account to install and run the FSMS software. The procedures for creating an account on a Windows system vary slightly between different versions of Windows.

**To create a Windows XP or Vista Administrator account:**

1. Log into your computer using an account that has administrator privileges.
2. For Windows Vista, click **Start > Control Panel > User Accounts > Manage Another Account > Create a New Account**. For Windows XP, click **Start > Control Panel > User Accounts > Create a New Account**.
3. Specify an account name, for example, FedExAdmin. For Windows XP, click Next.
4. For Windows Vista, choose Administrator as the account type. For Windows XP, choose Computer Administrator.
5. Click Create Account. The account is created and you return to the Manage Accounts window (Windows Vista) or the User Accounts window (Windows XP). Note that, at this point, the account does not have a password.
6. Click the account you just created to select it, and then click Create a Password.
7. The Create a Password window appears. Specify the password for your FedEx account and then click Create Password.
8. Reboot your computer and logon using the account you just created. You must use this account to install FSMS and you must use that same account to configure FSMS.

To create a Windows 2003 Server Administrator account:
1. Log into your computer using an account that has administrator privileges.
2. Create a new user account:
   a. Click Start > Control Panel > Administrative Tools > Computer Management > Local Users and Groups.
   b. Right-click the Users Folder and select New User.
3. Specify an account name; for example FedEx Admin.
4. Assign a password, then click Create.
5. Click the Users folder and find the newly created user account.
6. Click on the Member of tab, click the Add button, click the Advanced button, click the Find Now button, then double-click the Administrator selection from the list.
7. Click OK, click Apply, then OK.
8. Reboot your computer and logon using the account you just created. You must use this account to install and to configure FSMS.

Setting Windows Administrator User Rights

When you create the Windows Administrator account for FSMS, the account will have the privileges needed to run the FedEx services. To verify the account privileges on a Windows XP computer, for example, as part of a troubleshooting procedure, follow these steps.
1. Select Start > Control Panel > Administrative Tools > Local Security Policy. You might have to switch to Classic View to see the Administrative Tools icon.
2. In the left pane, expand Local Policies and then click User Rights Assignment. The User Rights policies appear in the right pane.
3. Double-click Log on as a service. The service properties dialog box appears.
4. On the Local Security Setting tab, verify that your Administrator account is listed. If necessary, click Add User or Group to add your Administrator account to the Log on as a service policy.

If you need additional assistance to create an Administrator account on your server, access the Microsoft Help and Support service at Start > Help and Support or visit microsoft.com.

Securing Your System and Password

During the installation process you are asked to provide a password for your FSMS Services account. Store this login information in a secure location. FedEx support cannot recover this login information for you.

You use this Administrator account to log into Windows when you configure FSMS. The FSMS server process also uses this account to interact with Windows. If the password for this account is changed, the password must be updated on all FSMS services to continue using the application.
How to Install FedEx Ship Manager Server

This section describes how to install the FSMS from the installation CD.

For Users of a FedEx Compatible Solutions Program (CSP) Application

Entering Your CSP Solution Type

If you received your FSMS software through a FedEx Compatible Solutions Provider, the CSP Solution Type Information window appears during the FSMS installation process (see Figure 1-1). The FedEx Compatible Solutions Program (CSP) integrates FedEx shipping capability with many popular business software systems. If you have not done this, cancel the installation program, install the CSP software, and then install the FSMS software.

If you do not have a Solution Type code and you have CSP software installed, contact your CSP provider to get the Solution Type code, which is a three-digit number that corresponds to the CSP software you installed. You must have this code to install FSMS properly for your CSP software. CSP Providers: Contact the FedEx Compatible Solutions team at CSPsupport@corp.ds.fedex.com to get the code for your solution type.

Figure 1-1: Enter CSP Solution Type and Proceed with Installing FedEx Ship Manager Server
Installing FedEx Ship Manager Server

Before you begin, complete all appropriate tasks in the pre-installation checklists.

To install your FedEx Ship Manager Server software:

1. Insert the FSMS software installation CD in your computer drive. If the installation process does not start automatically, launch the setup.exe from the FSMS1061 folder.
2. If you are installing FSMS for the first time, the program prompts you to select a language. Select the language in which to view the installation instructions and click OK to continue.
3. The FSMS setup prepares the InstallShield Wizard for the FSMS software installation.
4. If necessary, the Setup program installs the Microsoft Visual C++ Redistributable software. This step requires no intervention.
5. The Welcome message appears. Click Next to continue (see Figure 1-2).

Figure 1-2: InstallShield Screen
6. Enter the product key and press next (see Figure 1-3). The product key is HYBTY53MKU8GMTB.

Note: The product key is valid for three years from general release date of FedEx Ship Manager Server 10.6.1. However, if software is upgraded via a delta, then the product key is automatically built into the delta. If the product key is used beyond the expiration date, then the following error message displays: "The product key has expired. Enter a valid product key. If the problem persists, contact your software provider."
7. Select the directory location where you want to install FSMS (see Figure 1-4). To accept the default location, `C:\FedEx`, click **Next**. To select a new directory location, click **Browse**, then select the destination directory and click **Next**.

![Figure 1-4: File Destination Screen](image-url)
8. The wizard displays the **Start Copying Files** window (see Figure 1-5). Verify that the information is correct. If you need to change or review any settings, click **Back**. If the settings are correct, click **Next** to continue.

![Figure 1-5: Start Copying Files Screen](image-url)
9. The wizard displays the **Setup Status** window and shows the status of the FSMS installation (see Figure 1-6).

![Figure 1-6: Setup Status Screen Displays During Installation](image-url)
10. After the FSMS files have been installed, the password screen appears. The information you enter here is used to configure the startup permissions for the FSMS server processes. Enter the password for the server for the user that you logged in as (see Figure 1-7).

Note: If someone else logs in with a different password then the services will not start.

![Password Screen](image)

Figure 1-7: Password Screen
11. The Setup Status screen appears while the program configures the FSMS software (see Figure 1-8). After a few moments, the network connection dialog appears.

![Setup Status Screen](image)

Figure 1-8: Setup Status Screen Displays During Configuration
Chapter 1: Installation of FedEx Ship Manager Server

12. The network options screen lets you specify how the setup program should communicate with FedEx (see Figure 1-9).
   – Choose **FedEx Dialup** to connect through a modem.
     
     Specify a **Dial Prefix**, such as dialing 9 to get an outside line, if that is required for your site.
     
     Specify a **Dial Suffix**, such as an account number, if necessary.
   
   – Choose **Network** to connect through your site’s existing network (preferred option).
   
   – Choose **Private** to connect through an existing VPN connection to FedEx.

![FedEx Ship Manager Server](image)

Figure 1-9: Use Network Dialog Box to Specify Network Connection
13. If you selected **Network** in the previous dialog box, the next screen enables you to configure your local network configuration settings. If you do not know what to enter in this dialog box, see your local network administrator (see Figure 1-10).
   
a. Select **Connect through a Proxy Server** if you are connecting to FedEx through a proxy server. Be sure to click the **Set Proxy Password** button at the bottom of the window to specify the proxy user and password.
   
b. Specify whether you want to establish the connection manually or automatically by using a proxy configuration script.

14. To set up an automatic connection, select **Set Automatic Proxy Configuration Location (URL) for Tunnel Client** and specify the automatic configuration script URL.

15. To set up a manual connection, select **Set Manual Proxy Settings for Tunnel Client** and specify the address (iPort number) for the Tunnel Server.

16. Click **Test Internet Connection to FedEx** to test the round-trip network path from your FSMS software to the FedEx server. A message box displays your connection status. Click OK to close the message box, and then click Finish to complete the FSMS installation.

17. Best Practice: If your connection fails, please check your network settings. It may be that you need to input your proxy settings.

![Figure 1-10: Configure Direct Access](image-url)
18. The last screen prompts you to reboot your computer (see Figure 1-11). If you want to automatically launch the **Meter Registration Utility**, be sure to enable the checkbox. You can also launch the Meter Registration Utility from the FedEx folder that is installed on your desktop. To reboot your computer, click **Next**.

Note: You must receive a meter number from FedEx before you can use the FSMS application. FedEx recommends that you register immediately after you complete this installation.

![Figure 1-11: Launch Meter Registration Utility](image)

19. If you enabled the Meter Registration Utility checkbox, then the Meter Registration Utility opens.

If you did not enable the Meter Registration Utility checkbox, or immediately after you finish using the Meter Registration Utility, then the reboot screen appears. You must reboot your computer before you can begin using the FSMS software.

Note: FedEx Ship Manager Server application services start automatically each time you log on to your computer. To verify that these server processes are starting, select **Start** > **Control Panel** > **Administrative Tools** > **Services**. For detailed instructions, see “Troubleshooting” on page 2-57.
Installing FedEx Ship Manager Server in a Microsoft Based Failover/Availability Cluster

Prevent interruptions and improve your reliability. Cluster compatibility means redundant servers, so a single point of failure won’t bring your operations to a halt. Virtualization lets you replicate multiple servers on a single machine, requiring less hardware.

Note: A customer must have a pre-configured Cluster installed and configured prior to setting up FedEx Ship Manager Server in their environment.

Install Primary Node

1. Take secondary nodes offline via Cluster Administrator. Right click on the secondary node, then select “Stop Cluster Service.” See Figure 1-12.

Figure 1-12. Stop Cluster Service
2. Install FSMS on the Cluster shared drive.

**Install Any Additional Node(s)**

1. Bring secondary node online via Cluster Administrator. See Figure 1-13.
2. Take primary node offline via Cluster Administrator. Right click the primary node then select “Stop Cluster Service.” See Figure 1-12.
3. To add a node, locate “AddNode.exe” on the FSMS and execute CD and run.
4. Configure the FSMS Cluster as detailed below, now or after the complete cluster is set-up (i.e., all nodes have been added)

![Figure 1-13. Start Cluster Control Service](image-url)
Configure the FSMS Cluster

1. Add all services and configure as resource dependencies in Cluster Administrator, for the services listed below. Right click "Cluster Group," select "New," then select "Resource." See Figure 1-14.

Note: At a minimum FSMS must be configured and installed on your primary node.

Figure 1-14: Addition of Services

a. From the "Services" control panel, right click on each service and select "Properties." See Figure 1-15.

- FedEx Admin
- FedEx Broadcast Service
- FedEx ClsService
- FedEx ConfigManager Service
- FedEx Open Ship
- FedEx Print Service
- FedEx Query Service
- FedEx Rating
- FedEx Routing
- FedEx Ship Manager
b. On the “Cluster Panel” ensure that the “Name” and “Description” fields match the “Service Name” and the “Display Name” on the General Tab of the “Properties” window. See Figure 1-15.

c. Click “Next.”

d. The node names will automatically be populated within the “Possible Owners” list. If not, add them from the “Available Nodes” list and click “Next”. See Figure 1-16.
Figure 1-16. Possible Owners Screen

Note: Server names will be based on your environment.
2. Set dependencies for each added service as the dependencies are displayed in the “Service Control” panel for all FedEx services.
   a. Click on the Dependencies tab within the “Properties” panel. Add each service as a dependency and click “Next.” See Figure 1-17.

![Dependencies Tab](image1.png)

b. On the Generic Service “Parameters” window name the service exactly as it appears on the General tab of the “Properties” window and click “Next.” See Figure 1-18.

![Figure 1-18](image2.png)
3. Set registry replication.
   - Software\Federal Express
   - Software\FedEx
   - Software\FedEx Services
   - Software\FESC
   - Software\FXRS_Install
   a. Select each Registry Key and click “Add.”
   b. Click “Apply” when finished. See Figure 1-19.
1. Bring services online, if offline. Right click "Cluster Group" and select "Bring online." See Figure 1-20.

2. Once additional nodes are installed and configured, move the active group to the desired primary node. Right click "Cluster Group" then select "Move Group."

3. Refer to Chapter 2: Configuration of FedEx Ship Manager Server and configure FSMS as normal.

Note: FedEx recommends that the configuration not be set to automatically fail back. Manually move the group back to the preferred node. Also, set the configuration so that any single failure will fail the entire group and specify the number of failures in a time frame. FedEx does not maintain and support customer’s virtual or clustered environments.
Next Steps

After you install your FSMS software, you must perform the following steps:

- Launch the Meter Registration Utility, if you have not already done so as part of the installation process, and add a meter number. Launch the Meter Registration Utility from the FSMS folder on your Windows desktop.

  You must add a meter to your FSMS software before you can begin using shipping services. If you did not choose to launch the Meter Registration Utility at the end of your installation, then you can launch it at any time after the installation by double-clicking the Meter Registration Utility icon in the FSMS folder on your desktop.

- Configure your FSMS application using the FSMS Configuration Utility.

Registering Your FedEx Meter

A meter number is tied to your shipping location and your account number. You must have a master meter before you can begin using FSMS. You can start the Meter Registration Utility as part of the FSMS installation process or you can run it manually at any time to acquire meters. After you acquire a meter through the Meter Registration Utility, it appears in the rest of the FedEx programs, such as the FSMS Configuration Utility and the Demand Download Utility.
To register a FedEx Meter:

1. Start the FedEx Meter Registration Utility by double-clicking the **Meter Registration** icon in the FedEx Ship Manager folder on your desktop.

2. The Meter Registration Utility opens and displays the information for your account. If you opened the Meter Registration Utility as part of the installation process, then you must provide the following information:

   - **FedEx Acct. Number**: If you are a new FedEx shipper, sign up for a FedEx account at [fedex.com](http://fedex.com) or contact a FedEx representative for assistance at 1.800 GoFedEx 1.800.463.3339.
   - **Country**: Use the drop-down list to select the country you ship from.
   - **Postal Code**: Enter the postal code you ship from.

3. To request a new meter, click **Next**.

4. In the next Meter Registration Utility window, enter the detailed information about your shipper location, then click **Next**. **Account Number**, **Country** and **Postal Code** are carried over from the first Meter Registration Utility screen.
5. The installation program prompts you to restart your computer (see Figure 1-22).

![InstallShield Wizard Complete](image)

**Figure 1-22: Restart Computer Before Using FedEx Ship Manager Server**

6. After the reboot, be sure to log onto your system using the same account you used to install FSMS. The Meter Registration Utility finishes its configuration and displays an activity window that tracks the downloads received from FedEx as part of the meter registration progress (see Figure 1-23).
Note: The activity window is dynamic. Markers indicate status for each component:
– Yellow dot: A request for a component download is in progress.
– Checkmark: The component downloaded successfully.
– Red X: The component download failed.

Figure 1-23: Welcome to FedEx Meter Registration Utility
How to Uninstall FedEx Ship Manager Server

This section describes how to uninstall a previous version of FSMS software. The uninstall procedure differs slightly between Windows XP and Windows Vista.

Note: If you upgraded your system and now need to go back to your previous version, perform the uninstall procedure, then use the FSMS installation CD to run \Utilities\Cleansys.exe. If your FSMS software was bundled with your server, then the Utilities folder is within the software image file.

**Windows XP 2000/2003/2008**

1. Click **Start > Control Panel** to open the Windows Control Panel.
2. On the Windows XP Control Panel double-click **Add or Remove Programs**.
3. After the Currently Installed Programs list is populated, click **FSMS** to highlight it, then click **Remove**.
4. Click **Yes** when asked, Do you want to completely remove the selected application?
5. When the uninstall process finishes, you are asked to restart your computer. Click **No, I will restart my computer later**.
6. Return to the **Add or Remove Programs** window.
7. Scroll down the list and click **SQL Anywhere 10** to highlight it, then click **Remove**.
8. When the uninstall process finishes, you are asked to restart your computer. Click **Yes, I want to restart my computer now**.

**Windows Vista**

1. Click **Start > Control Panel** to open the Windows Control Panel.
2. If the Control Panel opens in the Control Panel Home view, click **Programs > Uninstall a Program**. If the Control Panel opens in the Classic View, double-click **Programs and Features**.
3. After the Currently Installed Programs list is populated, click **FSMS** to highlight it, then click **Remove**.
4. Click **Yes** when asked, Do you want to completely remove the selected application?
5. When the uninstall process finishes, you are asked to restart your computer. Click **No, I will restart my computer later**.
6. Return to the **Add or Remove Programs** window.
7. Scroll down the list and then click **SQL Anywhere 10** to highlight it, then click **Remove**.
8. When the uninstall process finishes, you are asked to restart your computer. Click **Yes, I want to restart my computer now**.
CHAPTER 2: CONFIGURATION OF FEDEX SHIP MANAGER SERVER

The FedEx Ship Manager® Server Configuration Utility is the interface for the FedEx Ship Manager Server (FSMS) application and provides security for critical system settings, such as meter numbers and FedEx service authorizations.

Because settings in the FSMS Configuration Utility are critical to each shipping transaction, if you attempt to use the FSMS Configuration Utility while processing a shipment or executing a transaction, an error may be generated by the FSMS application.

Follow these guidelines for entering or saving configuration data:

• A text field that appears in red contains an invalid field value. Correct the field before exiting the window.
• Holding the mouse cursor over a field displays a tip that describes the valid data for the field as well as the access level required to edit the field.
• If you click Exit or the Close button (×) to close the FSMS Configuration Utility, the data you entered will not be saved. Be sure to click Apply or Apply and Exit to save your entries.

Privileges and Access

Before you can use the FSMS for shipping, you must configure your initial settings. Your FedEx Customer Service representative or FedEx account executive can assist you to properly set up and configure your system.

There are two types of access privileges assigned:

• **User Level**: Privileges assigned to FedEx customers.
• **User Level - View**: Used to enable SmartPost.
• **Field Level**: Password protected privileges accessible by FedEx account executives and customer integration consultants (CICs).

Note: Someone with User Level privileges can optionally enable User Level-View privileges, which allows you to view Field Level settings but does not allow you to edit those settings.

Table 2-5 shows how privileges are assigned for each configuration category managed by the FSMS Configuration Utility.

<table>
<thead>
<tr>
<th>Configuration Tab</th>
<th>Description</th>
<th>User Level</th>
<th>Field Level</th>
</tr>
</thead>
<tbody>
<tr>
<td>Shipper Settings</td>
<td>FedEx shipper record data, including sender contact and address information.</td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>Report Settings</td>
<td>Report set-up data, including selection of report types to print, report document format and printer to use.</td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>Label Settings</td>
<td>FedEx shipping label data.</td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>Doc-Tab Settings</td>
<td>Information for the doc-tab section of a FedEx label.</td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>System Settings</td>
<td>Critical system data, such as reconcile time periods, connection port numbers, backup intervals, Future Day service extensions and discount rate authorization.</td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>IPD / IED / IDF</td>
<td>Setup FedEx optional contract services:</td>
<td>X</td>
<td></td>
</tr>
<tr>
<td></td>
<td>FedEx International Priority DirectDistribution® (IPD)</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>FedEx International Priority DirectDistribution® Freight (IDF)</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>FedEx International Economy DirectDistribution℠ Service (IED)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Tracking Numbers</td>
<td>FedEx Express® and FedEx Ground® tracking numbers and management.</td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>Meter Settings</td>
<td>FedEx account meter number with additional fields for authorizing and configuring FedEx Express and FedEx Ground services.</td>
<td>X</td>
<td></td>
</tr>
</tbody>
</table>
Planning Your Configuration Setup

Before configuring your FSMS software, you should understand the types of shipping operations you will be performing. For example, if you will be shipping internationally, then you will need printers to print labels and international reports documents. If you will be shipping from multiple locations, then you will need a series of meter numbers to properly track and identify the operations at each location.

Work with your FedEx Customer Service representative or FedEx account executive to design a FedEx shipping solution to meet your individual needs. Here are some basic questions to consider before deciding what services you need.

**Where Do You Ship?**

Are your shipments domestic or international? Do you ship to local destinations, cross-country, or a combination of these types of destinations? Do your packages need to be there quickly? Do you ship freight or documents?

**Are Your Shipments Identical or Different?**

Do you ship items that have the same weight? Do you ship to fixed locations?

**Do You Ship Single or Multiple Packages Per Shipment?**

If you ship multiple packages to a single location, then FedEx can consolidate your shipments.

**What Services Do You Need?**

For more information about services offered by FedEx, see your FedEx Customer Service representative, read the *FedEx Ship Manager® Server Services and Shipping Guide* or go to [fedex.com/us/services](http://fedex.com/us/services).

### About Managing Meters

A meter number is a method of tracking shipping activities for a particular FedEx account number. A meter number is used for many FSMS functions, such as meter level report generation, revenue data upload and tracking number assignment. FedEx Ship Manager Server can handle more than one account number, but each meter is assigned to a single account number. Each account number will have a master meter and each master meter can have many child meters.

Meter numbers are unique to FedEx account numbers and cannot be used with any account number other than the one to which it has been assigned.

The Shipper Settings tab is used to enter information about the shipping origin location. Shipper settings should be configured before any other configuration information is added. The first meter added to this configuration will be the master meter; all subsequent meters to be added are child meters that are associated with the master meter.
Why Meter Numbers Are Important

Meter numbers let you manage your shipments and provide accounting and reporting according to a number of different scenarios, such as geographical location of shipping areas, distribution systems, and internal setup of departments and invoicing.

How Many Meters Do You Need?

Every FSMS installation needs a master meter which is tied to your FedEx account number. You can configure additional meters (child meters of your master meter) to suit the needs of your business. For example, if your business has many locations, you will have the master meter associated with your primary location, and then use a child meter for each additional location where you perform shipping services. FedEx Ship Manager Server functions, such as rates, tracking, and reports are tied to the location specified for each meter. Another way to use child meters is to associate a child meter with each department within your organization so that the shipping activities of each department can be accounted for and tracked.

How to Get a Meter Number

The Meter Registration Utility is installed as part of the FSMS installation process. Use it to acquire a master meter initially as part of the installation process then acquire additional meters (child meters) of your master meter.

Note: The Shipper Settings tab in the FSMS Configuration Utility has a checkbox labeled Do not allow Multiple Meters per Account Number. If this checkbox is enabled, then you can have only one meter for your account number. If you want more than one meter, then you must first disable this checkbox. You must have Field Level access to edit this setting.

The following procedure assumes that you have already entered your account number and registered a master meter as part of the installation process. If you already have a master meter, then any additional meters for the same account number will be child meters.

To start the FedEx Meter Registration Utility:

1. Double-click the Meter Registration icon in the FedEx Ship Manager folder on your desktop.
2. The Meter Registration Utility opens and your FedEx Acct Number and existing Master Meter number are already filled in. The meter you acquire will be a child meter of the specified Master Meter.
3. Specify the contact and location information that you want to associate with this child meter, and then click Next.
4. The Meter Registration Utility displays an activity window that tracks the downloads received from FedEx as part of the meter registration progress.

Note: The activity window is dynamic. Markers indicate status for each component:

- Yellow dot: A request for a component download is in progress.
- Checkmark: The component downloaded successfully.
- Red X: The component failed to download.
Using the FedEx Configuration Utility

Before using FSMS, the application must be properly configured using the FSMS Configuration Utility, which allows you to enter and store user-specific and system-specific data. The FSMS Configuration Utility displays four tabs when the FSMS Configuration Utility is set for User level access.

User Level Tabs

- Shipper Settings
- Report Settings
- Label Settings
- Doc-Tab Settings

The FSMS Configuration Utility displays additional tabs when the FSMS Configuration Utility is set for Field Level access:

- System Settings
- Meter Settings
- Advanced Settings
- SmartPost Settings
- IPD / IED / IDF Settings (International Priority Distribution Configuration)
  - This tab is present only if you have contracted with FedEx for these premium services.
- Tracking Numbers

Configuration Tips

- A text field that appears in red contains an invalid field value. Correct the field before exiting the window.
- Holding the mouse cursor over a field displays a tip that describes the valid data for the field as well as the access level required to edit the field.
- If you click the Close button ( ) or the Exit button to close the FSMS Configuration Utility, the data you entered will not be saved. You must first click Apply or Apply and Exit to save your entries before you close the Configuration Utility.

Opening the Configuration Utility

When the FSMS Configuration Utility screen opens, it displays only the tabs you are allowed to edit based on your access privilege level. Complete the following steps to open the FSMS Configuration Utility and change the access level if needed.

To open the FedEx Ship Manager Server Configuration Utility and set access privileges:

1. Double-click the FedEx Ship Manager Server folder on your desktop to display the FSMS shortcuts.
2. Double-click the FedEx Ship Manager Server Configuration icon.
3. If you need to change the access level, click **Access Privileges**. The **Access Privileges** dialog box appears (see Figure 2-24).

![Access Privileges Dialog Box](image)

**Figure 2-24: Access Privileges Dialog Box**

4. Enter your password.
   a. For **User Level** access, leave the **Password** field blank. When you click **OK**, the Configuration screen displays the default User Level access view and disregards any previous access level you may have used.
   b. For **User Level View** access, type **View** as the password. (Be sure to type a capital "V". The password field is case-sensitive.) User Level View access shows the same tabs as Field Level access, but you cannot edit Field Level items except on the **IPD / IED / IDF Settings** tab.
   c. For **Field Level** access, type the password provided by your FedEx account executive.

5. Click **OK** to continue.

Note: Figure 2-25 shows the Field Level view of the FSMS Configuration Utility with the tabs that appear when you have **User Level** access. To view additional tabs, you must change your access privileges.
Figure 2-25: Shipper Settings Tab - Field-Level View with User-Level Access
Figure 2-26 shows **Field, Support, and Developer Level** access to the FSMS Configuration Utility. When duplicate meters are set up, which are two or more systems that are set with the same meter number, the **Duplicate Meter** checkbox displays on the **Shipper Settings** tab. When this checkbox is checked, the drop-down list displays a list of systems: **System A** through **System Z**, as well as **Blank**. This is the Sub Meter ID. Each duplicate meter has a Sub Meter ID listed in the drop-down list, which prevents duplicate tracking numbers from being downloaded to each meter. The setting that is currently configured is highlighted in the list.

Note: The **Duplicate Meter** checkbox does not display for User Level access, and is greyed out for User Level View access. The **IPD / IED / IDF Settings** tab also does not display if the shipper has not contracted for those optional services.
Configuring Shipper Settings

Configure shipper settings, as shown in Figure 2-27, before entering any other configuration information. The first meter added to this configuration is the master meter. All subsequent meters are child meters associated with the master meter.

To configure Shipper Settings:

1. Click the Shipper Settings tab.

![Shipper Settings Tab](image-url)
2. All bold fields on the Shipper Settings tab are required to configure a meter. Items that have an asterisk (*) will be printed on the shipping label. To edit the items that are grayed, you must have Field Level access privileges. When you are finished, click Apply or Apply and Exit to save your selections. Table 2-6 describes Shipper Settings.

<table>
<thead>
<tr>
<th>Setting</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Master Meter Number (physical location of hardware)</td>
<td>Allows you to select meter you want to configure. When a master meter is selected, the label displays Master Meter Number. When a child meter is selected, label displays Meter Number with Master grayed out.</td>
</tr>
<tr>
<td>Account Number</td>
<td>The customer’s FedEx account number.</td>
</tr>
<tr>
<td>Master Meter</td>
<td>When this checkbox is enabled, it indicates that this meter number is the master meter. You cannot disable this checkbox after you create a master meter because an FSMS installation must have a master meter.</td>
</tr>
<tr>
<td>Do Not Allow Multiple Meters per Account Number</td>
<td>Check this box to prevent multiple meters from using the same 9-digit FedEx account number. This will allow a Close Request transaction using the account number only.</td>
</tr>
<tr>
<td>Contact Name*</td>
<td>Enter the contact name. This can be a company name.</td>
</tr>
<tr>
<td>Company Name*</td>
<td>Enter the company name.</td>
</tr>
<tr>
<td>Department*</td>
<td>Enter the name of the department shipping from the assigned meter. This entry will print in the Sender section of the label. The Department field value can be overridden by using field 38 in the shipping transaction.</td>
</tr>
<tr>
<td>Address Line 1*</td>
<td>Enter the primary address for your location, typically the street name and number.</td>
</tr>
<tr>
<td>Address Line 2*</td>
<td>Enter any secondary address information, such as Suite #, on Address Line 2.</td>
</tr>
<tr>
<td>City*</td>
<td>Enter the city name from which shipping will originate.</td>
</tr>
<tr>
<td>Country*</td>
<td>FedEx Ship Manager® Server (FSMS) defaults to U.S. To select another country, click the drop-down menu and highlight the appropriate choice. If your country is postal aware (which means that your address is supported in the FedEx URSA file), you must supply a verifiable postal/ZIP code as part of your shipper record. The verification is supplied by FSMS after you select the country from which you are shipping. If shipping from a country that is not postal aware, the postal code you enter is not validated and any routing information supplied on your package label is determined from the FedEx location designated for your country.</td>
</tr>
<tr>
<td>State/Province*</td>
<td>If you are located in U.S., Canada or Puerto Rico, select your state or province from the drop-down menu.</td>
</tr>
<tr>
<td>Postal Code*</td>
<td>Enter the postal code for your shipping origin location.</td>
</tr>
<tr>
<td>Cleaned Postal</td>
<td>When you enter your shipper address, including your postal code, FSMS checks the URSA file to ensure that the postal code is correct and displays the matched postal code found. If you want to revert to your original entry, click the Revert button. FSMS will change the postal code back to your original entry.</td>
</tr>
<tr>
<td>Phone Number*</td>
<td>Enter your company phone number. No special characters, such as dashes, are allowed.</td>
</tr>
<tr>
<td>Origin Loc ID</td>
<td>The FedEx location identification (if your shipper address is postal aware, which means that your address is supported in the FedEx URSA file) of your shipping origin location. This information is not entered but comes from the URSA file located on your server. The Origin Loc ID may be overridden with FedEx assistance.</td>
</tr>
<tr>
<td>Meter Time Zone</td>
<td>FSMS lets you select a time zone for each meter (both master and child) configured on your server. This functionality lets you designate Close Times and other elements for each meter by its specific time zone.</td>
</tr>
</tbody>
</table>
| Force Close Time                                          | Enter the most convenient time for FSMS to close your shipping day. Force Close is activated only if you have not closed your shipping day 24 hours before the Force Close Time entered. Following are Force Close Time rules:  
  • The Force Close Time is entered in military time (for example, 1:00 p.m. = 1300).  
  • Force Close Time is a meter level setting.  
  • Force Close Time defaults to the nearest hour at the time the master meter is added. For example, if a meter is added at 3:37 p.m., the Force Close Time will default to 1500.  
  • Child meters default to the same time as the master meter. |
Configuring Report Settings

Open the Report Settings tab, as shown in Figure 2-28, to configure output settings for FSMS reports. Reports are categorized by type in the left pane of the tab screen.

Note: The administrator account used to install FSMS must have permission to access networked printers.

After you make your selections for a selected report, you can easily duplicate those settings to all meters or to all reports by clicking Copy to All Meters or Copy to All Reports.

To configure Report Settings:

1. Click the Report Settings tab.

<table>
<thead>
<tr>
<th>Setting</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Email Address</td>
<td>Enter the e-mail address for the shipping contact in your company.</td>
</tr>
<tr>
<td>Pager Number</td>
<td>Enter the pager number for the shipping contact in your company.</td>
</tr>
</tbody>
</table>

Note: Elements marked with asterisks will be printed on the shipping label.
2. The **Report Format** will apply to reports on all meters. Choose one of the following formats:
   - RTF: Rich Text Format, compatible with all versions of Microsoft® Word
   - TXT: ASCII text format, raw text with no formatting
   - DOC: Microsoft Word format
   - PDF: Portable Document Format, which can be viewed with the free Adobe Reader application
   
   **Note:** Do not use TXT for FedEx Ground or IED/IPD/IDF reports.

3. Expand the Reports list and click a report to select it. The reports that appear in the list depend on the services you have enabled. **Table 2-7** lists samples of reports available.
## Table 2-7: Report List Samples

<table>
<thead>
<tr>
<th>Reports</th>
<th>U.S. origin, FedEx Express®. The Shipment Summary report provides a summary of all shipping.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Domestic</td>
<td></td>
</tr>
<tr>
<td>International</td>
<td></td>
</tr>
<tr>
<td>Ground</td>
<td></td>
</tr>
<tr>
<td>DG</td>
<td></td>
</tr>
<tr>
<td>Freight</td>
<td></td>
</tr>
<tr>
<td>Shipment Summary</td>
<td></td>
</tr>
<tr>
<td>Reports</td>
<td>U.S. origin, FedEx Express and FedEx Ground®</td>
</tr>
<tr>
<td>Domestic</td>
<td></td>
</tr>
<tr>
<td>International</td>
<td></td>
</tr>
<tr>
<td>Ground</td>
<td></td>
</tr>
<tr>
<td>DG</td>
<td></td>
</tr>
<tr>
<td>Freight</td>
<td></td>
</tr>
<tr>
<td>Shipment Summary</td>
<td></td>
</tr>
<tr>
<td>SmartPost</td>
<td></td>
</tr>
<tr>
<td>Reports</td>
<td>U.S. origin, FedEx SmartPost® enabled</td>
</tr>
<tr>
<td>Domestic</td>
<td></td>
</tr>
<tr>
<td>International</td>
<td></td>
</tr>
<tr>
<td>Ground</td>
<td></td>
</tr>
<tr>
<td>DG</td>
<td></td>
</tr>
<tr>
<td>Freight</td>
<td></td>
</tr>
<tr>
<td>Shipment Summary</td>
<td></td>
</tr>
<tr>
<td>SmartPost</td>
<td></td>
</tr>
<tr>
<td>Reports</td>
<td>U.S. origin, all services enabled</td>
</tr>
<tr>
<td>Domestic</td>
<td></td>
</tr>
<tr>
<td>International</td>
<td></td>
</tr>
<tr>
<td>IPD Distribution/IPD/IED</td>
<td></td>
</tr>
<tr>
<td>IDF</td>
<td></td>
</tr>
<tr>
<td>Ground</td>
<td></td>
</tr>
<tr>
<td>DG</td>
<td></td>
</tr>
<tr>
<td>Freight</td>
<td></td>
</tr>
<tr>
<td>Shipment Summary</td>
<td></td>
</tr>
<tr>
<td>Reports</td>
<td>CA origin, MX origin, FedEx Express only</td>
</tr>
<tr>
<td>Domestic</td>
<td></td>
</tr>
<tr>
<td>International</td>
<td></td>
</tr>
<tr>
<td>DG</td>
<td></td>
</tr>
<tr>
<td>Freight</td>
<td></td>
</tr>
<tr>
<td>Shipment Summary</td>
<td></td>
</tr>
</tbody>
</table>
4. Specify a Printer and a Directory.
   a. Choose from the printers that have been configured on your computer.
   b. End-of-Day (EOD) reports cannot be printed and can only be saved to a directory.

5. Some reports have extra configuration selections:
   a. You can print multiple copies for selected International, Shipment Summary and Bill of Lading reports.

### Table 2-7: Report List Samples (Continued)

<table>
<thead>
<tr>
<th>Reports</th>
<th>CA origin, FedEx Express and FedEx Ground</th>
<th>CA origin, all services enabled</th>
</tr>
</thead>
<tbody>
<tr>
<td>+ Domestic</td>
<td></td>
<td>• FedEx Ground reports will be enabled when the FedEx Ground checkbox on the Meter Settings tab is selected. After enabling FedEx Ground, click the Apply and Exit button and then re-launch the FSMS Configuration Utility to configure FedEx Ground reports.</td>
</tr>
<tr>
<td>+ International</td>
<td></td>
<td>• The IPD and IDF reports will be enabled when IPD is manually configured or after a download of the rate file if the account is a valid IPD or IDF account.</td>
</tr>
<tr>
<td>+ IPD Distribution[IPD/IED]</td>
<td></td>
<td></td>
</tr>
<tr>
<td>+ IDF IDF</td>
<td></td>
<td></td>
</tr>
<tr>
<td>+ Ground</td>
<td></td>
<td></td>
</tr>
<tr>
<td>+ DG</td>
<td></td>
<td></td>
</tr>
<tr>
<td>+ Freight</td>
<td></td>
<td></td>
</tr>
<tr>
<td>+ Shipment Summary</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Reports</th>
<th>Non-U.S. or CA origin, FedEx Express only</th>
<th>Non-U.S. or CA origin, all services enabled</th>
</tr>
</thead>
<tbody>
<tr>
<td>+ International</td>
<td></td>
<td>• The IPD and IDF reports will be enabled when IPD is manually configured or after a download of the rate file if the account is a valid IPD or IDF account.</td>
</tr>
<tr>
<td>+ DG</td>
<td></td>
<td></td>
</tr>
<tr>
<td>+ Shipment Summary</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

| Reports                                      | Close Reports                                                                  |                                                  |
|----------------------------------------------|--------------------------------------------------------------------------------|                                                  |
| + Domestic                                    |                                                                               | • The FedEx SmartPost Detail, Manifest, and Return Reports can be enabled here.             |
| + International                               |                                                                               |                                                  |
| + Ground                                      |                                                                               |                                                  |
| + DG                                          |                                                                               |                                                  |
| + Freight                                     |                                                                               |                                                  |
| + Shipment Summary                            |                                                                               |                                                  |
| + SmartPost Detail                            |                                                                               |                                                  |
| + Manifest                                    |                                                                               |                                                  |
| + Returns                                     |                                                                               |                                                  |
b. For all **International** reports, choose either 8-1/2" x 11" or A4 paper.

c. The FedEx Express Dangerous Goods report, **Express 1421C**, can be printed on multi-ply forms or on plain paper.

6. For International Commercial Invoice, Proforma Invoice and International Certificate of Origin reports, you can specify a custom letterhead and a digital signature by choosing graphics files (PNG, TIF, JPEG or JPG).

7. After you make your graphics selection for one report, enable the **Default Letterhead Image** and **Default Signature Image** checkboxes to make your selections the default for all reports that accept graphics elements. See Figure 2-29.

8. Click **Apply** or **Apply and Exit** to save your selections.

---

**Figure 2-29: FedEx Electronic Trade Documents Options on Report Settings Tab**
Configuring Laser and Thermal Air Waybill Defaults

Before you configure a laser and/or thermal printer, make sure you first install the printer and verify that you can connect to it from the server that runs the FSMS application. Then use the Laser and Thermal Air Waybill Defaults groupbox, shown in Figure 2-30 and Figure 2-31 to configure these settings.

To designate printers to print laser and/or thermal air waybills:

1. Click the Label Settings tab.
2. Under Laser and Thermal Air Waybill Defaults, click the printer icon next to the label type you want to configure, or click the folder icon and specify the directory to which you want the thermal label buffers saved.

3. The Printer Selection screen appears and shows the printer you set as the default. Click OK to accept the configuration or go to Step a. to change your selection.
   a. To change the printer selection, click Properties to display a list of available printers.
   b. Select a printer and click OK. The printer you selected appears in either the Laser Printer ID or Thermal Printer ID field, depending on your selection.

4. If you selected a thermal printer:
   a. In Thermal Type, use the drop-down menu to select a thermal type.
   b. In Label Stock, use the drop-down menu to select the air waybill label type to use.

5. To include the Ground C.O.D. Return Reference Indicator on labels, choose an option from the list. The following describes the field:
   0 Tracking number
   1 Reference number
   2 Purchase order number
   3 Invoice number

To designate additional laser and thermal label copies:

1. Click the Label Settings tab.
2. Under International, enter the number of labels to print for FedEx International services. You may print up to three (3) copies per category.
   a. In Shipper, enter the number of additional labels to print for the person or company sending the shipment.
   b. In Customs, enter the number of additional labels to print to fulfill international customs regulations.
   c. In Manifest, enter the number of additional labels to print with manifest documents.
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Figure 2-31: Additional Laser and Thermal Copies Groupbox

Note: The IPD/IPD/IPD items appear only if one of the optional services is enabled on the IPD/IPD/IPD tab. IPD (FedEx International Priority DirectDistribution®), IDF (FedEx International Priority DirectDistribution® Freight) and IED (FedEx International Economy DirectDistribution™ Service) are optional contract services offered by FedEx to customers with specific international shipping requirements. For more information, contact your FedEx Customer Service representative.

To select an air waybill multi-ply pin-feed printer:

1. Click the Label Settings tab shown in Figure 2-30.
2. Under Multi-Ply Printer Defaults shown in Figure 2-32, click the Printer icon ( ) to select the pin-feed printer for multi-ply forms.

3. In the Printer Selection screen, select the printer type.
4. If you choose to print multi-ply air waybills, use the drop-down menu in Form Type to select the form associated with the label stock.

Table 2-8 describes the form types:

<table>
<thead>
<tr>
<th>Form Type</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Form 306</td>
<td>FedEx® International Air Waybill with a preprinted tracking number</td>
</tr>
<tr>
<td>Form 307</td>
<td>FedEx International Air Waybill without a preprinted tracking number</td>
</tr>
<tr>
<td>Form 362</td>
<td>French language FedEx International Air Waybill without a preprinted tracking number</td>
</tr>
</tbody>
</table>

To print “Do Not Ship” labels:

- Check the Do Not Ship Labels checkbox to print “Do Not Ship” on package labels when a shipment transaction fails. Use this option for batch processing to prevent the disruption of label printing if a shipment transaction fails.

Note: Use this feature if you prepare multiple-piece shipments (MPS) where multiple packages and labels are prepared as a single shipment. This feature is not available for single package labels.

To apply and save your label configurations:

- Click Apply or Apply and Exit to save changes to printer selections and other settings on the Label Settings tab.
Configuring System Settings

System settings enable you to set important system level parameters. These settings are global and apply to all meters on the server. You need Field Level access privileges to configure system settings.

To configure system settings:
1. If the System Settings tab is not displayed, click the Access Privileges button and type the password for Field Level access privileges.
2. Click the System Settings tab shown in Figure 2-33.

![System Settings Tab](image-url)
3. Configure system settings as described in the following tables, and then click **Apply** or **Apply and Exit** to save your selections.

**Table 2-9: System Settings Tab**, on page 2-18, describes general fields on the **Systems Settings** tab.

**Table 2-10: System Settings for Database Backup**, on page 2-18, describes **Database Backup** fields on the **Systems Settings** tab.

**Table 2-11: System Settings for Ship History**, on page 2-19, describes **Ship History** fields the fields on the **Systems Settings** tab.

---

### Table 2-9: System Settings Tab

<table>
<thead>
<tr>
<th>Setting Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Reconcile Time</td>
<td>The time at which your server communicates with FedEx mainframe systems to download any new components (rates, URSA, etc.). The <strong>Reconcile Time</strong> defaults to 0300. Recommendation: Configure the reconcile time to a time when no server activity is occurring. Note: You cannot set <strong>Reconcile Time</strong> to 0000.</td>
</tr>
<tr>
<td>Enable Password Configuration</td>
<td>Select this checkbox to enable the Enter Password and Confirm Password fields. Enter the same password in both fields.</td>
</tr>
<tr>
<td>CTS Port Number</td>
<td>The port used to send standard FedEx transactions to FedEx Ship Manager® Server (FSMS).</td>
</tr>
<tr>
<td>Web Services Port Number</td>
<td>The port used to send Web Services transactions to FSMS.</td>
</tr>
<tr>
<td>Origin Phone Number</td>
<td>Your system modem number.</td>
</tr>
<tr>
<td>Transaction Log</td>
<td>Enable this checkbox to have the system keep a log file all transactions processed by FSMS. The default is 1 day. Use the Day box to specify a longer retention period, up to 3 days.</td>
</tr>
<tr>
<td>Use Dynamic Surcharging</td>
<td>Check this box to use the Dynamic Surcharging feature, which is described in detail in the <em>FedEx Ship Manager® Server Developer Guide</em>. When switching between standard and dynamic surcharging, the Open Ship service must be stopped and then restarted for the change to take effect.</td>
</tr>
<tr>
<td>Extend 90 Day limit - Ground</td>
<td>Check this box to extend the 90-day limit for FedEx Ground® Future Day shipping transactions processed in advance. The extension applies to FedEx Ground domestic and international shipping only. When this box is not selected, the standard 90-day limit is used for Future Day shipping.</td>
</tr>
<tr>
<td>Receive Rates</td>
<td>Check this box to enable the download of non-U.S., CA or PR origin discount rates. This checkbox is a system-level setting and is only visible and active for FedEx international (non-U.S. or CA) master meters.</td>
</tr>
</tbody>
</table>

### Table 2-10: System Settings for Database Backup

<table>
<thead>
<tr>
<th>Setting Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Backup Time</td>
<td>Time each day that FedEx Ship Manager® Server backs up shipping data to the specified directory. Specify the time in the 24-hour (hhmm) format (for example, 0100 equals 1 a.m.).</td>
</tr>
<tr>
<td>1st Backup Directory</td>
<td>Type a directory path or click the Folder icon (<em>folder</em> icon) to browse and select a directory.</td>
</tr>
<tr>
<td>2nd Backup Directory</td>
<td>Type a directory path or click the Folder icon (<em>folder</em> icon) to browse and select a directory.</td>
</tr>
</tbody>
</table>
Chapter 2: Configuration of FedEx Ship Manager Server

Configuring Meter Settings

The Meter Settings tab lets you configure meters for FedEx Express, FedEx Ground, and international services. (FedEx SmartPost service is configured on the SmartPost Settings tab. See the FedEx Ship Manager® Server Developer Guide for details) The Meter Settings tab requires Field Level access privileges.

To configure Meter Settings:

1. If the Meter Settings tab is not displayed, click the Access Privileges button and type the password for Support from Field Level access privileges.
2. Click the Meter Settings tab shown in Figure 2-34.

Figure 2-34 shows the Meter Settings tab when a meter is set up for U.S.-origin shipping.

### Table 2-11: System Settings for Ship History

<table>
<thead>
<tr>
<th>Settings</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Retention Interval</td>
<td>The length of time that FedEx Ship Manager® Server (FSMS) retains your FedEx Express® shipping history information. Specify the time in the 24-hour (hhmm) format (for example, 1300 equals 1 p.m.). Retention Interval is the length of time your FedEx Express shipping history information is stored by FSMS. You may specify an interval of up to 90 days. Purge Time is the time at which the Ship History files are purged after the retention interval has elapsed. Export Time is the time at which Ship History files are exported after the retention interval has elapsed. Specify the export file names for FedEx Domestic Express, FedEx International Express, FedEx International MPS Express, FedEx Ground®, FedEx Freight®, and FedEx SmartPost®.</td>
</tr>
<tr>
<td>Purge Time</td>
<td>Specify the time in the 24-hour (hhmm) format (for example, 0100 equals 1 p.m.).</td>
</tr>
<tr>
<td>Export Time</td>
<td>Specify the time in the 24-hour (hhmm) format (for example, 0100 equals 1 p.m.).</td>
</tr>
<tr>
<td>Domestic Express</td>
<td>Type a directory path or click the Folder icon ( ) to browse and select a directory.</td>
</tr>
<tr>
<td>International Express</td>
<td>Type a directory path or click the Folder icon ( ) to browse and select a directory.</td>
</tr>
<tr>
<td>International MPS Express</td>
<td>Type a directory path or click the Folder icon ( ) to browse and select a directory.</td>
</tr>
<tr>
<td>Ground</td>
<td>Type a directory path or click the Folder icon ( ) to browse and select a directory.</td>
</tr>
<tr>
<td>SmartPost</td>
<td>Type a directory path or click the Folder icon ( ) to browse and select a directory.</td>
</tr>
</tbody>
</table>
Note: FedEx® Electronic Trade Documents will default to off when a new meter is added.

3. Configure the following Meter Settings, then click **Apply** or **Apply and Exit** to save your selections.

   - **Table 2-12: FedEx Express Options, on page 2-21**, describes the fields on the Meter Settings tab for setting up FedEx Express service.
   - **Table 2-13: FedEx Ground Options, on page 2-21**, describes the fields on the Meter Settings tab for setting up FedEx Ground service.
   - **Table 2-14: FedEx Electronic Trade Documents Options, on page 2-22**, describes the fields on the Meter Settings tab for setting up FedEx Electronic Trade Documents service.
   - **Table 2-15: General Options, on page 2-22**, describes fields for general options.
   - **Table 2-16: FedEx SmartPost Options, on page 2-22**, describes fields on the SmartPost Settings tab for setting up FedEx SmartPost service.

Note: See Configuring FedEx SmartPost, on page 2-28 and the Fedex Ship Manager® Server Developer Guide for instructions on how to configure the settings for the optional FedEx SmartPost service.
### Table 2-12: FedEx Express Options

<table>
<thead>
<tr>
<th>Settings</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>List Rates</td>
<td>If List Rates is selected, List Rates are available for the meter(s) on your server. U.S. origins only.</td>
</tr>
<tr>
<td>Third Party Consignee</td>
<td>When this option is selected, the Commercial Invoice for international shipments is not be attached to the shipment.</td>
</tr>
<tr>
<td>Late Drop Off Time</td>
<td>If your shipping site has an extended shipping day agreement with FedEx (for example, you have a late drop-off time of 1:00 a.m.), you may set this parameter to have your shipping labels display the extended day date instead of rolling to the next shipping day.</td>
</tr>
<tr>
<td>Canada Label Customs Value Suppression</td>
<td>This option, if selected, prevents the customs value for a FedEx CA-origin shipment from printing on the shipping label.</td>
</tr>
<tr>
<td>ExpExtFutureAllowed</td>
<td>Enable this checkbox to allow Future Day FedEx® Express shipments, which can be up to 45 calendar days from the current day depending on the availability of next month’s FedEx URSA file. Future Day shipments are uploaded to FedEx when you close your shipping day and retained in a file until the package future ship date equals the current day. This is an operations approved feature. Contact your FedEx CIC or CSP provider for more information. Note: Future Day shipments are limited to 10 days in advance when using FedEx Electronic Trade Documents.</td>
</tr>
</tbody>
</table>

### Table 2-13: FedEx Ground Options

<table>
<thead>
<tr>
<th>Settings</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ground Enabled</td>
<td>If this box is selected, then you are configured for FedEx Ground® and FedEx Home Delivery® shipping. When you enable this checkbox, other fields in the FedEx Ground Options box become available. You must enable this checkbox before you can configure the other FedEx Ground options.</td>
</tr>
<tr>
<td>List Rates</td>
<td>If this box is selected, then list rates are available to the meter(s) on your local FedEx Ship Manager® Server (FSMS) client.</td>
</tr>
<tr>
<td>HazMat</td>
<td>If you have contracted to ship hazardous materials using FedEx Ground, then this box must be selected to process these shipments on your FSMS client.</td>
</tr>
<tr>
<td>ECOD</td>
<td>If you have contracted to ship FedEx Electronic Collect On Delivery (E.C.O.D.) using FedEx Ground, then this box must be selected to process these shipments on your FSMS client.</td>
</tr>
<tr>
<td>Label Multipack Piece Count</td>
<td>Selecting this option causes the package count to appear on FedEx Ground MPS labels in the 1/X, 2/X format where X indicates the total package count. The Label Multi Pack Piece Count option is explained in the FedEx Ship Manager® Server User Guide.</td>
</tr>
<tr>
<td>Custom Transit Data Key</td>
<td>Passes the number of days a package will spend in transit. U.S. or Canada shippers who set up customized FedEx Ground transit times are responsible for meeting all terms and conditions of their agreement with FedEx related to getting the customized transit time. These conditions include any factors external to FSMS including, but not limited to, cut-off times, volume requirements and sorting requirements. FSMS quotes customized transit times when specified but cannot consider these external factors when providing the customized transit time.</td>
</tr>
<tr>
<td>Custom Transit Exclusion File</td>
<td>Enable the checkbox to indicate that a ZIP/postal exclusion file is used when providing customized transit times to the shipper. Click the folder icon to specify the location of the file.</td>
</tr>
<tr>
<td>Ground Account Number</td>
<td>Your FedEx Ground account number.</td>
</tr>
<tr>
<td>SCNC</td>
<td>This drop-down menu provides the Serial Container Numeric Code (SCNC) formats for FedEx Ground labels. The SCNC option is explained in the FedEx Ship Manager® Server User Guide.</td>
</tr>
</tbody>
</table>
Table 2-13: FedEx Ground Options (Continued)

<table>
<thead>
<tr>
<th>Settings</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>IGD Enabled</td>
<td>Enable this checkbox to enable FedEx International Ground® Distribution Shipments.</td>
</tr>
<tr>
<td>IGDD Enabled</td>
<td>Enable this checkbox to enable FedEx International Ground DirectDistribution® Shipments.</td>
</tr>
<tr>
<td>IGDD Hub Code</td>
<td>Enables you to specify the distribution hub.</td>
</tr>
<tr>
<td>IGD Account Number</td>
<td>Your FedEx International Ground Distribution account number.</td>
</tr>
</tbody>
</table>

Table 2-14: FedEx Electronic Trade Documents Options

<table>
<thead>
<tr>
<th>Settings</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>FedEx Electronic Trade Documents Allowed</td>
<td>This checkbox must be enabled to activate FedEx® Electronic Trade Document functionality. You must have Field Level Access to configure FedEx Electronic Trade Documents settings.</td>
</tr>
<tr>
<td>Use FedEx Electronic Trade Documents</td>
<td>This checkbox allows FedEx Electronic Trade Documents to be used on all FedEx International Express and FedEx Ground® shipments in countries which allow FedEx Electronic Trade Documents.</td>
</tr>
<tr>
<td>Upload Confirmation</td>
<td>This selection allows the customer to toggle between Not Required and Required. Selecting Required halts further FedEx Electronic Trade Documents processing until a confirmation is received. Selecting Not Required allows all transactions to process without waiting for upload confirmation of each Electronic Trade Document.</td>
</tr>
</tbody>
</table>

Table 2-15: General Options

<table>
<thead>
<tr>
<th>Settings</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>No Upload No Ship</td>
<td>If this option is selected, FedEx Ship Manager® Server does not allow shipping to continue if revenue files have not been uploaded for 72 hours.</td>
</tr>
</tbody>
</table>

Table 2-16: FedEx SmartPost Options

<table>
<thead>
<tr>
<th>Settings</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>SmartPost Enabled</td>
<td>When selected, this checkbox indicates that you have contracted to ship using the FedEx SmartPost® service. This selection can be enabled with User Level access.</td>
</tr>
<tr>
<td>Customer ID</td>
<td>The unique FedEx SmartPost Customer ID. This is an alphanumeric text box with a maximum of 5 characters. The Customer ID is critical for the electronic manifest of FedEx SmartPost shipments.</td>
</tr>
<tr>
<td>Mailer ID</td>
<td>A Mailer ID is issued by the U.S. Postal Service to identify mail owners and mailing agents or other service providers, such as consolidators. The Mailer ID can be a 9-digit or a 6-digit number. The Mailer ID is used to identify mail pieces, trays, sacks or containers.</td>
</tr>
<tr>
<td>Customer Distribution Center</td>
<td>This two-digit number indicates the distribution center that supports your shipping location according to the Mailer ID. This is entered during configuration and is part of the electronic FedEx SmartPost shipping manifest file.</td>
</tr>
<tr>
<td>Pick Up Carrier</td>
<td>Either FedEx Ground® or FedEx SmartPost® can be the pickup carrier. The number of tracking numbers available depends upon the Pickup Carrier. Media will only be available with FedEx Ground pickup.</td>
</tr>
</tbody>
</table>
Chapter 2: Configuration of FedEx Ship Manager Server

Note: For new installations, FedEx SmartPost will be enabled or disabled based on the SmartPost enablement flag that is set in the cust.tbl, which will be downloaded with Domestic Rates. After an upgrade, FedEx SmartPost configurations will be retained.

### Configuring Electronic Trade Documents

The ETD Allowed checkbox, shown in Figure 2-34, is found on the Meter Settings tab. The checkbox is visible under Field and Support Privilege Levels for sender countries allowed to use Electronic Trade Documents. User Level access does not have permission to enable Electronic Trade Documents.

1. Select the ETD Allowed checkbox.

Note: This checkbox will only be visible when the sender country allows Electronic Trade Documents for a given meter.

2. The Electronic Trade Documents - Terms and Conditions Language Selection pop-up window appears, as shown in Figure 2-35.

3. Select the language preference and choose I accept Terms and Conditions and select OK.

Note: Accepting the terms and conditions must only be done once.

<table>
<thead>
<tr>
<th>Settings</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hub ID</td>
<td>Select the Hub ID for the FedEx SmartPost Hub city to which you want to send the shipment. A new HUB ID field appears for each meter setting configured on your system. You must associate a Hub ID with each meter number. The Hub ID is a unique four-digit number that identifies a specific city where a FedEx SmartPost hub is located. For example, Hub ID 5531 identifies New Berlin as a FedEx SmartPost hub. If the FedEx SmartPost enabled option is checked, you must select a Hub ID. If you do not select an ID, the following error message appears: “SmartPost Hub ID Field cannot be left blank”.</td>
</tr>
<tr>
<td>Postal Classes Allowed</td>
<td>There are four main USPS postal classes. Based on your FedEx SmartPost contract, your system is enabled for a certain class.</td>
</tr>
<tr>
<td>Delivery Confirmation Default</td>
<td>Available if you enabled Ground Enabled in the Ground Options section of the Meter Settings tab and you selected FedEx Ground as the PickUp Carrier in the SmartPost Options section.</td>
</tr>
<tr>
<td>Auto Close time</td>
<td>The time setting a customer chooses to define when shipments should be automatically closed. This selection can be configured with User Level Access.</td>
</tr>
</tbody>
</table>
Chapter 2: Configuration of FedEx Ship Manager Server

Figure 2-35: FedEx Electronic Trade Documents Terms and Conditions Screen

Note: The date and meter number will be captured and retained in a log file after the terms and conditions are accepted. The log file is stored in C:\FedEx\FedEx_Cfg.

4. The **Informational Message** for digital letterhead logo and digital signature image appear, as shown in Figure 2-36.

Figure 2-36: Digital Letterhead Logo and Digital Signature Message

Note: Many countries require the letterhead and signature for electronic documents, so it is important to upload them prior to processing shipments.

Note: The maximum letterhead image cannot exceed 7.75" x 3" for letter-size paper with a 3" offset.
5. The **Meter Settings** tab reappears with the **ETD Default Options**, as shown in Figure 2-34.

6. The Electronic Trade Documents feature automatically defaults to **Use ETD**, as shown in Figure 2-34, under **ETD Default Options**. So when the shipping destination allows Electronic Trade Documents, it will automatically be functional.

Note: Electronic Trade Documents can be temporarily de-activated on a transaction by transaction basis. Passing in Field 2805 (ETD Indicator) set to **N** will not allow Electronic Trade Documents for that particular transaction.

Note: Electronic Trade Documents default functionality can be turned off for all transactions by unchecking the **Use ETD** checkbox.

7. Under Upload Confirmation, select **Not Required** or **Required**, depending upon preferences.

   – **Not Required** allows all additional transaction processing to continue irrelevant of a successful confirmation from FSMS Common Document Upload Service (CDUS).

   – **Required** halts all subsequent transaction processing until a successful confirmation is received back by CDUS. FedEx Ship Manager Server will default to No Wait for Confirmation. If you select Wait for Confirmation Required, you will NOT be able to process ANY transactions while you wait for the confirmation.

Note: In the Upload Confirmation settings, either setting can be temporarily de-activated on a transactional basis by passing Field 2820 (ETD Wait for Confirmation) set to either “Y” or “N”.

Note: FedEx Ship Manager® Server times out after two minutes if a successful confirmation is not received. FedEx Ship Manager Server then returns a hard error and the document upload transaction must be re-submitted.

**Best Practice:** If you would like confirmation of your document upload, it is recommended to pass in any customer generated documents in the **049 Pre-Shipment Upload Transaction** with Field 2820 set to “Y” for Electronic Trade Documents upload confirmation in order to optimize shipping speed within the **020 Global Ship Transaction**.

Note: Customers can upload the Commercial Invoice, Certificate of Origin, Proforma Invoice, and other documents of the following file types: DOC (MS Word), XLS (MS Excel), TXT (plain text), RTF (Rich Text), JPG, GIF, BMP, PNG, TIF and PDF (Adobe Acrobat) (this does not include Microsoft Word 2007 DOCX or Microsoft Excel XLSX) in any local language. The maximum file size per document is 1 MB and you can upload 5 documents at a time.

Note: Adjust the size of the document before uploading the document, and you can upload up to five documents at a time.

**Best Practice:** When processing an Open Ship transaction for MPS shipments using Electronic Trade Documents please ensure you provide commodity level detail for both Master and Child pieces.

Note: If you would like to setup Electronic Trade Document report setting, including your default Digital Letterhead and Digital Signature Image, click the report setting tab. Go to “Configuring Report Settings” on page 2-10 for detailed information.

8. Select **Apply and Exit**.

**Methods for Uploading Electronic Trade Documents Shipping Document:**

**Method 1:** After uploading the Customer Generated shipping documents with the **049/149 Pre-Shipment Document Upload**, the **020/120 Global Ship Transaction** must process the shipment. The field that links the 049/149 to the 020/120 is Field 2817.

Note: Please ensure that you clearly specify what customs documentation you are uploading, e.g. Commercial Invoice. Failure to do so will result in no upload and can potentially lead to delayed shipments.

**Method 2:** Upload Customer and FedEx Generated shipping documents and ship at the same time via the **020/120 Global Ship Transaction**.
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Software ID Data Capture

Click the **Software ID Data Capture** button of the Meter Settings tab to display the **Software ID Data Capture** dialog box shown in Figure 2-37, which displays further identification information about CSP client software that is associated with your FSMS installation. Before editing Software ID information, be sure that you have reviewed the CSP Installation and Solution Type information listed in Table 1-4 on page 1-6. Table 2-17 describes fields used to capture Software ID information.

![Software ID Data Capture Dialog Box](image)

### Figure 2-37: Software ID Data Capture Dialog Box

<table>
<thead>
<tr>
<th>Setting</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Client Name</td>
<td>This field is provided for the entry of a CSP interface or for customers who use FedEx Ship Manager® Enterprise with the FedEx Ship Manager® Server (FSMS) application.</td>
</tr>
<tr>
<td>Client Version</td>
<td>The software version associated with the Client Name is entered in this field.</td>
</tr>
<tr>
<td>Middleware Name</td>
<td>If you use a middleware application with the FSMS application, enter the middleware identification in this field.</td>
</tr>
<tr>
<td>Middleware Version</td>
<td>The software version associated with the Middleware Name is entered in this field.</td>
</tr>
</tbody>
</table>

### Configuring Handling Charges in the Meter Settings Tab

If your shipping operation charges handling fees in addition to shipping and insurance charges, FSMS allows you to add these handling fees to your total shipment charge. You can configure handling charges in two ways:

- Use the Handling Charges Dialog available on the Meter Settings tab. The Handling Charges Dialog provides options for both FedEx Express and FedEx Ground shipping services.
- Include fields to assess handling charges in a FSMS transaction. See the *FedEx Ship Manager® Server Transaction Coding Reference Guide* for transaction coding requirements if assessing handling charges in the transaction.

Note: Fees can also be printed on the doc-tab portion of the 4 x 6 shipping label.

### To open the Handling Charges Dialog:

1. Click the **Meter Settings** tab.
2. Click **Handling Charges**. The **Handling Charges Dialog** screen appears, as shown in Figure 2-38.
3. Use the **Service Type** drop-down menu to select the service for which you want to configure handling charges. You must configure FedEx Express and FedEx Ground separately. Configure one service, then change the **Service Type** selection to configure another.
Use the FedEx SmartPost Service Type option to configure fixed and variable handling charges for FedEx SmartPost shipments. See “Configuring Handling Charges for FedEx SmartPost” on page 2-36 and the FedEx Ship Manager® Server Developer Guide for details on setting handling charges for FedEx SmartPost.

Handling Charge Calculation

The settings required to designate a handling charge calculation are defined in Table 2-18.

<table>
<thead>
<tr>
<th>Setting</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fixed Amount</td>
<td>Select this checkbox to add a predetermined handling charge to each package/shipment. For example, select Fixed Amount if you charge a fixed handling fee for all packages regardless of the package value or shipping charge.</td>
</tr>
<tr>
<td>Percent of Freight Charge</td>
<td>Select this checkbox if you want FedEx Ship Manager® Server (FSMS) to calculate a fixed percentage of the list rate (undiscounted) shipping charge and apply it as a handling fee. For example, if you select this option, you may enter 3.00 (%) of the shipping charge for the package to be assessed as the handling charge for the shipment.</td>
</tr>
<tr>
<td>Percent of Net Charge</td>
<td>Select this checkbox if you want FSMS to calculate a fixed percentage of the net freight charges (including discounts) to be applied as a handling fee. For example, if you select this option, you may enter 3.00 (%) of the discounted shipping charges for the package to be assessed as the handling charge for the shipment.</td>
</tr>
</tbody>
</table>
Chapter 2: Configuration of FedEx Ship Manager Server

### Handling Charge Level

In addition to the ability to add handling charges via a transaction, FSMS also provides the ability to set up handling charges within the configuration. Any handling charge provided through an FSMS transaction overrides the handling charges configured using the FSMS Configuration Utility. The Handling Charge Level section of the Variable Handling window allow you to select whether you want the handling charge calculated on the package level or on the shipment level.

If you select Package and configure a handling charge, then FSMS applies this handling charge to each package added to a multiple-package shipment. Therefore, if you have 10 packages in a single multiple-package shipment, the total handling charge is the handling charge multiplied by 10.

If you select Shipment and configure a handling charge, then FSMS applies this handling charge to the entire shipment. Therefore, if you have 10 packages in a single multiple-package shipment, then the total handling charge is not changed.

### Handling Charge Amount

The Handling Charge Amount field allows you to enter either the actual dollar amount (if you selected Fixed Amount in the Handling Charge Calculation section) or the percent amount if you choose any Percent option as a Handling Charge Calculation. Field entry requirements are as follows:

- Dollar amounts are entered in the Handling Charge Amount field as XXXXX.XX. For example, a handling charge of five dollars is entered as 5.00.
- Percent amounts are entered in the Handling Charge Amount field as XXXXX.XX. For example, a handling charge of ten percent is entered as 10.00.

### Managing Your Handling Charge Entries

The Variable Handling window allows you to enter handling charges for both FedEx Express and FedEx Ground shipments for each meter number configured on your server. If you have a master meter and three child meters, you may make up to four FedEx Express and four FedEx Ground Handling Charge configuration settings by selecting the meter you want to configure from the Master Meter drop-down menu at the top of the Variable Handling window. If you configure the master meter and want to save that configuration for all meters on your server, then click the Copy to All Meters button at the bottom of the Variable Handling window.

### Configuring FedEx SmartPost

FedEx SmartPost is an optional contract service for shippers of high volume, low weight, and less time-sensitive packages that uses the U.S. Postal Service (USPS) for final delivery. FedEx SmartPost configuration settings are made on the FedEx SmartPost Settings and Tracking Numbers tabs. Configuration and rates for the contractual FedEx SmartPost services will be enabled and maintained on the FedEx central system and downloaded to the device through a DLL process. FedEx SmartPost configuration settings can be enabled and/or disabled with User Level Access.

Note: If shipping both FedEx SmartPost outbound and FedEx SmartPost Returns you MUST have two account numbers, two Mailer IDs, and two meters for the outbound SmartPost shipment and the Return shipment.

FedEx SmartPost configuration settings are on the SmartPost Settings tab of the FSMS Configuration Utility. If you have had FedEx SmartPost enabled by your customer account representative, then you will have access to configure the FedEx SmartPost Options on
SmartPost Settings tab, as shown in Figure 2-39. Both FedEx SmartPost outbound services and FedEx SmartPost Returns services must be enabled independently. You must have one of the following access privileges to configure FedEx SmartPost settings:

- User Level View
- Field
- Support
- Development

Note: Shipping both FedEx SmartPost outbound and FedEx SmartPost Returns requires 2 separate accounts and meters configured for the outbound FedEx SmartPost shipment and the return shipment.

**Configuring FedEx SmartPost Outbound Services**

In releases of FedEx Ship Manager Server prior to V 10.6.1, FedEx Authorized Technical contacts were required to manually configure the devices to setup the pickup carrier, to enable FedEx SmartPost services, and to load the FedEx SmartPost rate and ZIP to zone files. Starting with v 10.6.1 release, all configuration and rate information is maintained on the FedEx central server and information is automatically downloaded to the customer devices using the DLL process.

Note: This is accomplished with the Demand Download Utility. You must download FedEx Express Domestic Rates and SmartPost Rates. This initiates the data download within the SmartPost settings tab. If you do not download FedEx Express Domestic rates, a manual configuration of FedEx SmartPost settings will be required.

Note: Another option to download rates is to run the 057 Demand Download Request Transaction.
Figure 2-39: FedEx SmartPost Configuration Settings on SmartPost Settings Tab
Configuring FedEx SmartPost Returns Service

You must download the “update features” from the Demand Download Screen before configuring a new meter for FedEx SmartPost Returns.

1. Start the FSMS Configuration Utility.
2. Click the Access Privileges button.
3. Enter password and click OK.
4. Click the SmartPost Settings tab. See Figure 2-40.

![FedEx Configuration](image_url)

Figure 2-40: SmartPost Settings tab with SmartPost Returns Enabled Checkbox
5. Click **Add** and a pop-up window displays, as shown in Figure 2-41.

![Figure 2-41: Add FedEx SmartPost Returns Dialog Box](image)

6. Enter a Returns Account number.
7. Click **Get Address** to get the Returns Account information.
8. FedEx Ship Manager Server validates that the Returns Account is part of the same National Account and auto-populates the following information:
   a. Company Name
   b. Contact Name
   c. Address Line 1
   d. Address Line 2
e. City  
f. State  
g. ZIP  
h. Phone Number  

Note: The contact name and phone number fields are the only editable fields.

9. Use the Modify/Delete buttons to update the returns account information.

10. Click Add to add the returns account number to the FSMS database. Then the account information will display in the bottom portion of the SmartPost Settings tab.

11. Click Apply.

### Obtaining Tracking Numbers

In order to obtain tracking numbers and Delivery Confirmation Numbers, proceed with Step 12.

Note: Each returns account must have its own tracking number range. If the Delivery Confirmation ranges need to be deactivated, then FSMS will deactivate the Delivery Confirmation Numbers (DCN) range at reconcile. See Figure 2-42.

1. Download the DCNs from the Demand Download Screen when the FedEx SmartPost Delivery Confirmation Numbers checkbox is checked.

2. Download the “Update Features” from the Demand Download Screen when the FedEx SmartPost Update Features checkbox is checked.

Use Figure 2-38 to guide your selections.

Note: The information entered in the fields in Figure 2-38 is automatically provided according to your account setup for FedEx SmartPost. These fields are for reference only and may not be edited.

<table>
<thead>
<tr>
<th><strong>Table 2-19: FedEx SmartPost Settings Fields</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Settings</strong></td>
</tr>
<tr>
<td>Customer ID</td>
</tr>
<tr>
<td>Mailer ID</td>
</tr>
<tr>
<td>Customer Distribution Center</td>
</tr>
<tr>
<td>PickUp Carrier</td>
</tr>
</tbody>
</table>
| Hub ID | Select the Hub ID for the FedEx SmartPost Hub city to which you want to send the shipment. A new HUB ID field appears for each meter setting configured on your system. You must associate a Hub ID with each meter number.  
  The Hub ID is a unique four-digit number that identifies a specific city where a FedEx SmartPost hub is located. For example, Hub ID 5531 identifies New Berlin as a FedEx SmartPost hub.  
  If the FedEx SmartPost enabled option is checked, you must select a Hub ID. If you do not select an ID, the following error message appears: “SmartPost Hub ID Field cannot be left blank”. |
| Postal Classes Allowed | There are four main USPS postal classes. Based on your FedEx SmartPost contract, your system is enabled for a certain class. |
3. Click the Tracking Numbers tab.
   a. The Tracking Numbers tab shows the Delivery Confirmation Number (DCN) ranges, as shown in Figure 2-42. The Tracking Numbers tab includes:
      - **FedEx SmartPost Delivery Confirmation Numbers** — displays current range of Delivery Confirmation Numbers (DCN) in the Start, End, and Current fields. Refer to the Developer Guide for information on setting the future range of DCN to the current range.
      - **FedEx SmartPost Future Delivery Confirmation Numbers** — contains the Start and End numbers that are received from FSMS for a Future Range of DCNs.
      - **Edit Tracking Number** — allows a FedEx representative (Field Level access or higher) to edit the FedEx SmartPost Delivery Confirmation Numbers in an emergency situation.
      - **FedEx SmartPost Returns Tracking Numbers Prefixes** — displays the Associated Returns Account tracking numbers. When downloaded, the Associated Returns Account tracking numbers are stored in this section of the Tracking Numbers tab.

<table>
<thead>
<tr>
<th>Settings</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Delivery Confirmation Default</td>
<td>An optional service available for each postal class. Delivery confirmation is included by default at the account level for all FedEx SmartPost shipments. Exceptions can be requested only at the account level.</td>
</tr>
<tr>
<td>Auto Close Time</td>
<td>Available if you enabled FedEx Ground Enabled in the FedEx Ground Options section of the SmartPost Settings tab and you selected FedEx Ground as the PickUp Carrier.</td>
</tr>
<tr>
<td>View</td>
<td>Allows users to view current accounts.</td>
</tr>
<tr>
<td>Add</td>
<td>Allows user to add additional account information.</td>
</tr>
<tr>
<td>Modify and Delete</td>
<td>Use the <strong>Modify</strong> and <strong>Delete</strong> buttons to update the Returns account information.</td>
</tr>
</tbody>
</table>
4. Locate the SmartPost Delivery Confirmation Numbers section.

Current and future ranges of Delivery Confirmation Numbers can now be downloaded with either Field 1053 (new position 23) or with the Demand Download Utility.

If a customer passes in a request for DCNs and a current range already exists, then the Start and End range text boxes in the FedEx SmartPost Future Delivery Confirmation Numbers area will be populated with the new range of numbers.

In addition, at reconcile, if more than 80% of the current range has been used, then a future range will automatically download and populate the Future range Start and End text boxes.
If the current range of DCNs is exhausted and the Future range Start and End text boxes are populated, then the Future range will automatically move over to the Current range.

Express tracking numbers and FedEx SmartPost delivery confirmation numbers are grouped under the Tracking Numbers checkbox on the Demand Download Utility and can be selected individually when this checkbox is expanded. See Figure 2-44 to see the new options for FedEx SmartPost DCNs.

If the current range of DCNs is less than 80% used, then the option to download FedEx SmartPost Delivery Confirmation numbers will be grayed out.

The eight-digit delivery confirmation number is embedded in the Delivery Confirmation Bar Code printed on the FedEx SmartPost label. A delivery confirmation number does not repeat within a 12-month period.

**Configuring Handling Charges for FedEx SmartPost**

Handling charges are fixed and/or variable amounts and are a percentage of the shipping charges and/or surcharges. The Meter Settings tab has been updated to include a new drop-down choice for handling charges for FedEx SmartPost shipments.

Configure fixed and variable handling charges for FedEx SmartPost shipments.

**To configure FedEx SmartPost Handling Charges:**

1. Start the FSMS Configuration Utility.
2. Click the **Access Privileges** button.
3. Enter password and click **OK**. (At least User Level-View Access is needed.)
4. Click the SmartPost Settings tab.
5. On the top right of the screen, click the Handling Charges button to display the Handling Charges Dialog, as shown in Figure 2-43. Select the **Meter**, **Service Type**, **Handling Charge Calculation**, **Handling Charge Level**, and **Handling Charge Amount**.
6. Click the **OK** or the **Copy to all Meters** button.

See Figure 2-43.
For U.S. outbound shipments, the handling charges will be returned in the 120 Global Ship Reply Transaction. Use the following fields in the transaction (See Figure 2-39):

- Request
  - 1588 - Handling Charge Type
  - 1595 - Handling Charge Amount or Percentage
  - 1606 - Handling Charge Application Point
- Reply
  - 1596 - Handling Charge
# Table 2-20: Handling Charges Fields

<table>
<thead>
<tr>
<th>Field ID</th>
<th>Field Length</th>
<th>Data Type</th>
<th>Input/Output</th>
<th>FedEx Shipping Services</th>
<th>Handling Charges Fields Valid For</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Handling Charge Amount or Percentage</strong></td>
<td><strong>Transactions: 020 Global Ship Request</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1595-#</td>
<td>Max=7.2</td>
<td>N</td>
<td>I</td>
<td>FDXE FDXG FDXS</td>
<td>All</td>
<td>Optional Handling charge as dollar amount or percentage. If Field 1588 (Handling Charge Type) is set to 1 (Fixed handling charge amount), Field 1595 contains a currency amount. For example, a value of 500 means $5.00. If Field 1588 is set to 2, 3 or 4, Field 1595 contains a percentage. For example, a value of 500 means 5%. Field allows up to seven (7) numeric characters, two of which are implied decimal entries. For shipping, use Single Shot, Single Piece, Open Ship, or MPS.</td>
</tr>
<tr>
<td><strong>Handling Charge</strong></td>
<td><strong>Transactions: 120 Global Ship Reply, 125 Rate Available Services Reply</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Charged by customer to the shipment. It may be either a fixed or variable charge. Format: 9999999.99 Decimal place is implicit.</td>
</tr>
<tr>
<td>1596</td>
<td>Max=11.2</td>
<td>N</td>
<td>O</td>
<td>FDXE FDXG FDXS</td>
<td>All</td>
<td>Charge applied by customer to the shipment. It may be either a fixed or variable charge. Format: 9999999.99 Decimal place is implicit.</td>
</tr>
<tr>
<td><strong>Handling Charge Type</strong></td>
<td><strong>Transactions: 020 Global Ship Request</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1588-#</td>
<td>Max=1</td>
<td>N</td>
<td>I</td>
<td>FDXE FDXG FDXS</td>
<td>All</td>
<td>Optional Indicates the type of handling charge to be added to the net charge of the shipment. Valid values are: 0 — No handling charge 1 — Fixed handling charge amount 2 — Variable handling charge based on percentage of gross transportation charge 3 — Variable handling charge based on percentage of net charge 4 — Variable handling charge based on percentage of net charge minus Canada taxes (CA origin only) Note: For FedEx Ground® multiple-piece shipments (MPS), a value of 1, 2, 3, or 4 must be on the first package to enable variable handling charge on any subsequent package of the MPS. For shipping, use Single Shot, Single Piece, Open Ship, or MPS. Note: You may also choose to configure a recurring handling charge type in the FSMS Configuration Utility for your Transaction Distribution shipments.</td>
</tr>
</tbody>
</table>
Setting Up FedEx SmartPost Rates

Rates and Earned Discounts can be automatically downloaded with User Level Access.

Manually Downloading FedEx SmartPost Rates

1. Open the FedEx Demand Download Utility, as shown in Figure 2-44.
2. Expand the Rates checkbox.
3. Choose either SmartPost Rates and/or SmartPost Earned Discount Rates.
   Note: Earned Discounts apply to all FedEx SmartPost services. New rates are downloaded and implemented only at reconcile. Earned Discounts can also be downloaded using the Meter Registration Utility (MRU) or the Auto Configuration Utility (ACU).
4. Ensure the correct Meter/Account is selected.
5. Select Start.
6. After the FedEx SmartPost files have been loaded, go to the Services window (Start > Control Panel > Administrative Tools > Services) and locate the FedEx Rating.
7. Right-click on the FedEx Rating and choose STOP.
8. Locate and right-click on FedEx OpenShip and choose STOP.
9. Go back and right-click on the FedEx Rating and choose START.
10. Locate and right-click on FedEx OpenShip and choose START.

Note: Figure 2-44 shows the Update Features checkbox, which allows customers to request FedEx SmartPost updates.

<table>
<thead>
<tr>
<th>Field ID</th>
<th>Field Length</th>
<th>Data Type</th>
<th>Input/Output</th>
<th>FedEx Shipping Services</th>
<th>Handling Charges Fields Valid For</th>
<th>Handling Charges Fields Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1606-#</td>
<td>Max=1</td>
<td>N</td>
<td>I</td>
<td>FDXE, FDXG, FDXS</td>
<td>All</td>
<td>Optional</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Specifies at which level (package or shipment) FedEx handling charges apply. Valid values are: 0 or blank — Handling charge applied at the package level 1 — Handling charge applied at the shipment level Only repeat if used at the package level. For shipping, use Single Shot, Single Piece, Open Ship, or MPS.</td>
</tr>
</tbody>
</table>

Table 2-20: Handling Charges Fields (Continued)
Chapter 2: Configuration of FedEx Ship Manager Server

Configuring Doc-Tab Settings

A doc-tab is the peel-off strip at the top of a shipping label. Doc-tabs are used for back-office records and should be removed from actual shipping labels. You can print customizable labels using the 4" x 8" thermal label size with and without doc-tabs for SmartPost shipments.

FedEx SmartPost Shipping Label Default Doc-Tab Fields

Set Field 1619 (Doc-Tab Type) to value SP in the 070/170 Meter Query Request/Reply Transaction to configure a Doc-Tab for SmartPost shipments on the Doc-Tab Settings tab. See Table 3-18 in the Developer Guide for descriptions of doc-tab fields for U.S. Domestic Outbound shipping labels that will be printed in the doc-tab portion of the FedEx SmartPost label.

Table 2-21 describes the default doc-tab fields for U.S. Domestic Outbound shipping labels that will be printed in the doc-tab portion of the FedEx SmartPost label.
Chapter 2: Configuration of FedEx Ship Manager Server

Configuring Customizable Doc-Tab Labels

When FedEx SmartPost is enabled, you can configure Doc-Tab labels for U.S. outbound shipments.

To configure custom FedEx SmartPost Doc-Tab labels:

1. From the FedEx Configuration Utility, click Doc-Tab Settings.
2. Under Shipping Type, select SmartPost, as shown in Figure 2-45.
3. In the Doc-Tab Orientation section, select either Top or Bottom to designate how the doc-tab portion of the label exits the printer. Top means the doc-tab exits the printer last, after the rest of the label has printed; Bottom means that the doc-tab exits the printer first, before the rest of the label.
4. In the Label Stock Type section, choose the type of label stock you use.
5. Use the Doc-Tab Fields section to define information to be printed on the doc-tab. Click the drop-down menu under the Values column and then select an item in the list. The selected value appears in the Values column and the defined heading for this value appears in the Headings column. You may specify your own heading text by typing up to 12 characters (including spaces) in the Heading box.

When SmartPost is selected as the Shipping Type, the following fields are available in the Values drop-down list:

- Field 2801 - Hub-ID
- Field 2802 - Non-Machinable
- Field 2803 - Non-Machinable Surcharge
- Field 2800 - List Non-Machinable Surcharge
- Field 2804 - Delivery Confirmation Service Surcharge
- Field 2417 - SmartPost Service Type/Postal Indicia
- Field 2416 - Ancillary Endorsements
- Field 2418 - Delivery Confirmation Bar Code
- Field 2425 - SmartPost Customer ID
- Field 4926 - Preassigned Delivery Confirmation Tracking Number
- Field 4927 - Delivery Confirmation Tracking Number

---

Table 2-21: FedEx SmartPost Default Doc-Tab Fields for Shipping Labels

<table>
<thead>
<tr>
<th>Position 1</th>
<th>Heading</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Invoice</td>
<td>Invoice Number</td>
</tr>
<tr>
<td>2</td>
<td>Customer</td>
<td>Customer Reference</td>
</tr>
<tr>
<td>3</td>
<td>Phone</td>
<td>Phone Number</td>
</tr>
<tr>
<td>4</td>
<td>Dept</td>
<td>Recipient Department Name</td>
</tr>
<tr>
<td>5</td>
<td>Date</td>
<td>Ship Date</td>
</tr>
<tr>
<td>6</td>
<td>Weight</td>
<td>Weight</td>
</tr>
<tr>
<td>7</td>
<td>Shipping</td>
<td>Net Charge</td>
</tr>
<tr>
<td>8</td>
<td>Special</td>
<td>Total Surcharge Amount</td>
</tr>
<tr>
<td>9</td>
<td>Handling</td>
<td>Total Customer Handling Charge</td>
</tr>
<tr>
<td>10</td>
<td>Total</td>
<td>Total Customer Charge Amount</td>
</tr>
<tr>
<td></td>
<td>Tab Portion</td>
<td>FedEx Ground® Tracking Number - 15 characters with no spaces</td>
</tr>
<tr>
<td></td>
<td></td>
<td>FedEx SmartPost® Tracking Number - 20 characters with additional spaces after every 4 characters</td>
</tr>
</tbody>
</table>
You can enable the **Reference** checkbox to have this field included on the label when it is printed. Normally, doc-tab fields are printed on the doc-tab section of the label, which is removed before shipping. A Reference field enables you to include any FedEx field on the label itself so that the recipient will be able to see the information.

Note: The **Reference** fields do not apply to Freight and are disabled.

6. Optionally, click **Copy to All Meters** to copy the **Doc-Tab Settings** information for the selected meter to all meters in the same origin country.

7. Click **Apply** or **Apply and Exit** to save your selections.

---

**Figure 2-45: FedEx SmartPost Doc-Tab Settings Tab**
Configuring FedEx SmartPost Reports

To configure FedEx SmartPost Detail report and a Manifest report, see “Printing FedEx SmartPost Reports” on page 2-45 on information on how to print these reports.

To print a FedEx SmartPost Detail or Returns report:

1. From the FedEx Configuration Utility shown in Figure 2-46, click Report Settings.
2. Under the Report > SmartPost list, click the Detail option or the Returns option, as shown in Figure 2-46.
To configure a FedEx SmartPost Manifest Report:

3. Click the Manifest option, as shown in Figure 2-47.

When the FedEx SmartPost Detail, Manifest or Returns Report option is selected, the following fields display on the FedEx SmartPost Report Settings Screen:

- Copy To All Meters checkbox
- Copy To All Reports checkbox
- Report Format drop down
- Printer field and icon
• Directory field and icon

4. Select the Headings and values to print in the Doc-Tab portion of the label.

5. Click **Apply** or **Apply & Exit**.

**Printing FedEx SmartPost Reports**

**FedEx SmartPost Detail Report**

Print this report in a

- 007/107 End-of-Day Close transaction for SmartPost, and set Field 3025 (Carrier Code) to **FDXS**.
- 070/170 Meter Query/Configuration transaction, and set Field 1373 (Report Code) to **67**.
- 095/195 Label Reprint transaction, and set Field 1373 (Report Code) to **67**.

Print this report in the following formats:

- Word document (.doc)
- Rich Text File (.rtf)
- Text only (.txt)
- Portable Document Format (.pdf)

*Figure 2-48 shows a FedEx SmartPost Detailed Report.*
Chapter 2: Configuration of FedEx Ship Manager Server

Figure 2-48: FedEx SmartPost Detailed Report
FedEx SmartPost Manifest Report

The Manifest Report shows FedEx SmartPost shipments in which FedEx Ground only is the pickup carrier, and it only includes the FedEx SmartPost Delivery Confirmation Numbers.

Print this report in a:

- **007/107 End-of-Day Close transaction** for SmartPost, and set Field 3025 (Carrier Code) to *FDXS*.
- **070/170 Meter Query/Configuration transaction**, and set Field 1373 (Report Code) to 69.
- **095/195 Label Reprint transaction**, and set Field 1373 (Report Code) to 69.

Print this report in the following formats:

- Word document (.doc)
- Rich Text File (.rtf)
- Text only (.txt)
- Portable Document Format (.pdf)

Note: The layout of this report is the same as the FedEx Ground Pickup Manifest.

*Figure 2-49* shows a FedEx SmartPost Manifest Report.
Figure 2-49: FedEx SmartPost Manifest Report
FedEx SmartPost Returns Report

Print this report:

  
  For information about the Report Viewer Utility, see Chapter 14: FedEx Ship Manager Server Utilities in the Developer Guide.

- In a 070/170 Meter Query/Configuration transaction, and set Field 1373 (Report Code) to 69.

- In a 095/195 Label Reprint transaction, and set Field 1373 (Report Code) to 69.

Print this report in the following formats:

- Microsoft Word document (.doc)
- Rich Text File (.rtf)
- Text only (.txt)
- Portable Document Format (.pdf)

Figure 2-50 shows a FedEx SmartPost Returns Report.

Figure 2-50: FedEx SmartPost Returns Report

For FedEx Ground, FSMS generates the FedEx Ground Pickup Manifest and closes the shipment.
Configuring Advanced Settings

Use the Advanced Settings tab to set communications and data retention parameters. You need Field Level access privileges to configure Advanced Settings.

To configure Advanced Settings:

1. If the Advanced Settings tab is not displayed, click the Access Privileges button and type the password for Field Level access privileges.
2. Click the Advanced Settings tab.

   Figure 2-51 shows the Advanced Settings tab when a meter is set up for U.S.-origin shipping.
3. Configure the Advanced Settings, and then click Apply or Apply and Exit to save your selections. Table 2-22 describes the settings on the Advanced Settings tab.

<table>
<thead>
<tr>
<th>Settings</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Force Close Active</td>
<td>FedEx requires that you perform a Close procedure at least once a day to upload any revenue files that have not been sent to FedEx at the end of your shipping day and to produce all End-of-Day reports. If a Close is not performed at least 24 hours prior to the Force Close Time (which is configured in the Settings window of the FedEx Ship Manager® Server Configuration Utility), FSMS performs a Close procedure for you. To prevent interruption in your shipping activities, choose a Force Close Time that will occur after your shipping day is completed. Select this checkbox to force each configured meter to close at the time entered on the Shipper Settings tab. Note: Each meter configured on your server undergoes a Force Close at the time specified for each meter on the Shipper Settings tab.</td>
</tr>
<tr>
<td>Express &amp; Ground Hourly Upload Interval</td>
<td>Use to set the frequency of the hourly upload of FedEx Express® package data to FedEx. You can set the upload frequency from 30-120 minutes. This applies to both FedEx Express and FedEx Ground® files.</td>
</tr>
<tr>
<td>Hourly Upload Retention Period</td>
<td>Number of days the FedEx Express Hourly Upload data is retained. You can set the period from 7-14 days.</td>
</tr>
<tr>
<td>Communication Check Interval</td>
<td>You can set the interval from 24-72 hours.</td>
</tr>
<tr>
<td>Communication Logging Retention Period</td>
<td>Number of days the communication log is retained.</td>
</tr>
<tr>
<td>Ground Hourly Upload Retention Period</td>
<td>Number of days you want the FedEx Ground Hourly Upload data retained on your system. You can set the period from 7-14 days.</td>
</tr>
<tr>
<td>Tracking File Retention Period</td>
<td>Number of days you want tracking results retained on your system.</td>
</tr>
<tr>
<td>Ground Commercial Invoice Upload Retention Period</td>
<td>Number of days you want the FedEx Ground Commercial Invoice Upload (GCIU) data retained on your system.</td>
</tr>
</tbody>
</table>
Configuring IPD / IED / IDF Settings

FedEx International Priority DirectDistribution® (IPD), FedEx International Economy DirectDistribution℠ Service (IED) and FedEx International Priority DirectDistribution® Freight (IDF) are optional contract services that allow you to send a multiple-package shipment from a single origin location to multiple recipients in one destination country using one international air waybill.

The IPD / IED / IDF Settings tab shown in Figure 2-52 appears only if you have contracted for one or more of these services and a FedEx customer consultant or FedEx account executive has configured FSMS for IPD, IED or IDF service. The IPD / IED / IDF Settings tab requires Field Level access privileges. For more information on IPD, IED, and IDF configuration, see the FedEx Ship Manager® Server Developer Guide.
Configuring Tracking Numbers

The Tracking Numbers tab shown in Figure 2-53 provides information for FedEx Express and FedEx Ground tracking number management. No entries are required in this window. The Tracking Numbers tab requires User-Level View access privileges.

To view Tracking Number settings:

1. If the Tracking Numbers tab is not displayed, click the Access Privileges button.
2. In the Password box type View then click OK. The password is case-sensitive; be sure to type View with an upper case V.

Figure 2-53: Tracking Numbers Tab
Chapter 2: Configuration of FedEx Ship Manager Server

**FedEx Express Tracking Numbers**

For a new installation, you must perform a download to acquire the initial range for the tracking numbers. Future tracking numbers are staged and automatically downloaded after half of the current range has been used. After the current tracking number range has been used, the future range displays in the **Express Future Tracking Numbers** area.

FedEx Express tracking numbers can be downloaded with the Demand Download Utility, which is available in the FSMS folder on your desktop. FedEx Express tracking numbers are also downloaded during a meter registration process if you use the Meter Registration Utility.

When the FedEx Ground tracking number range is depleted, the range automatically rolls over and begins again at 7010001. No action is needed to download FedEx Ground tracking numbers. The complete FedEx Ground tracking number is composed of three parts: the customer's 7-digit FedEx Ground account number, the 7-digit tracking number visible in the Tracking Numbers tab above, and a check digit. This complete 15-digit number is the tracking number used to track FedEx Ground packages.

**Editing Tracking Numbers**

You must have Field Level access privileges to edit express tracking numbers.

To edit Express tracking numbers:

1. **On the Tracking Numbers tab, click Edit Tracking Numbers.** The system displays a warning message to prompt you to suspend all shipments before you edit tracking numbers.
2. **Make your changes in the Express Tracking Numbers section, and then click Apply and Apply and Exit.** If you enter an invalid value, the number turns red.

**FedEx Ground Tracking Numbers**

You do not need to download FedEx Ground tracking numbers. The FedEx Ground Tracking Number range is automatically populated when FSMS is installed. The range is available when the master meter is properly configured by a FedEx Customer Support representative or field personnel. When the FedEx Ground tracking number range is depleted, the range automatically rolls over and begins again at 7010001.

A FedEx Ground tracking number shown in Figure 2-54 is composed of three parts: the customer's 7-digit FedEx Ground account number, the 7-digit tracking number visible in the Tracking Numbers tab, and a check digit. This 15-digit tracking number is used to track FedEx Ground packages.

![Figure 2-54: FedEx Ground Tracking Number Composition](image)

FedEx Ship Manager Server does not allow a value of zero (0) or null for the first digit in the FedEx Ground Tracking Number range fields.

**Enabling FedEx Ground Tracking Numbers**

You can view and monitor your tracking numbers if you have a Ground Enabled meter associated with a FedEx Ground account number. The following task must be performed by a FedEx Customer Support representative or field personnel.

To monitor FedEx Ground tracking numbers:

1. **Open the FedEx Configuration Utility.**
2. **Click the Meter Settings tab.**
3. In the **Ground Options** section, check the **Ground Enabled** box.

4. Click **Apply** to apply your changes or click **Apply and Exit** to apply your changes and close the utility window.

### Monitoring FedEx Ground Tracking Numbers

Use the Tracking Numbers tab in the FedEx Configuration Utility to monitor the FedEx Ground tracking numbers.

#### To monitor FedEx Ground tracking numbers:

1. Open the **FedEx Configuration Utility**.
2. Click the **Tracking Numbers** tab.
3. The **Ground Tracking Numbers Prefixes** section shows the FedEx Ground accounts and tracking number ranges for the selected meter number. The FedEx Ground tracking number range field (Start, End, Current) values must be specific to each FedEx Ground account on your system. Use the following Table 2-23 to guide your entries.

Note: You cannot edit account or tracking numbers.

<table>
<thead>
<tr>
<th>Prefix</th>
<th>Range</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>GRD Account #</td>
<td>Displays only account numbers for accounts tied to meters enabled for FedEx Ground®.</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Account numbers enabled for FedEx Ground. This field is pre-populated with tracking numbers for each FedEx Ground account number configured on your FSMS system. If the meter you select is not enabled for FedEx Ground, no accounts display.</td>
</tr>
<tr>
<td>Start</td>
<td>Valid number for first digit is 1–9. Default=7000001</td>
<td>Tracking number at start of range.</td>
</tr>
<tr>
<td>End</td>
<td>Valid number for first digit is 1–9. Default=9999999</td>
<td>Tracking number at end of range.</td>
</tr>
<tr>
<td>Current</td>
<td>Valid number for first digit is 1–9.</td>
<td>Last tracking number assigned for the account.</td>
</tr>
</tbody>
</table>

The FedEx Ground Tracking Numbers Prefixes section is password protected. To change your tracking numbers, contact your FedEx support representative. Your FedEx support representative can use the following tracking number options. Table 2-24 describes settings for Ground Tracking Number options.

<table>
<thead>
<tr>
<th>Settings</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Copy Range to All Accounts</td>
<td>Copy a specified Ground Tracking Number range to all of the FedEx Ground® Accounts on the system.</td>
</tr>
<tr>
<td>Edit</td>
<td>Edit the Ground Tracking Number range for a selected Ground Account Number. FedEx Ground Tracking Numbers can be edited per ground account number or continue to use the pool across all ground accounts. See the FedEx Ship Manager® Server Developer Guide for more information about how to manage FedEx Ground tracking numbers.</td>
</tr>
<tr>
<td>Reset Range to Default</td>
<td>Reset the Ground Tracking Number range to the default range for a selected FedEx Ground Account Number.</td>
</tr>
</tbody>
</table>
**Allocation of FedEx Ground Tracking Numbers**

FedEx Ship Manager Server allocates the ground tracking number range as follows for each FedEx Ground account number that has multiple meters tied to that account.

**Example 1: Shared meter account number**

FedEx Ground account number 1234567 with meter 44444
FedEx Ground account number 1234567 with meter 55555

If ten (10) packages are shipped using alternate meters, the tracking number assignment is as follows:

12345677000001
12345677000002
12345677000003
12345677000004
12345677000005
12345677000006
12345677000007
12345677000008
12345677000009
12345677000010

**Example 2: Unique meter account numbers**

FedEx Ground account number 1234567 with meter 44444
FedEx Ground account number 9876543 with meter 55555

The range for each meter could be the same entire allocation range for FSMS: 7000001 - 9999999.

If ten (10) packages are shipped using alternating meters, the tracking number assignment is as follows:

12345677000001
98765437000001
98765437000002
98765437000003
12345677000002
98765437000004
12345677000003
12345677000004
98765437000005
98765437000006

Note: In FSMS versions prior to FSMS v 10.0.1, the allocation of numbers in example 2 would have been as follows:

12345677000001
98765437000002
98765437000003
98765437000004
12345677000005
98765437000006
12345677000007
12345677000008
98765437000009
98765437000010
FedEx Ground Tracking Number Prefixes
FedEx Ground Tracking Numbers can be edited per ground account number or you can continue to use the pool across all ground accounts. Contact a FedEx Representative for more information or see the FedEx Ship Manager® Server Developer Guide.

FedEx SmartPost Returns Tracking Numbers Prefixes
As a result of adding the returns account information in the SmartPost Settings tab, the Tracking Numbers tab will auto-populate and display a range of Delivery Confirmation Numbers at the bottom in the SmartPost Returns Tracking Number Prefixes section in the Start, End, and Current fields.
See the FedEx Ship Manager® Server Developer Guide for instructions on how to configure settings for optional FedEx SmartPost service.

FedEx SmartPost Delivery Confirmation Numbers
FedEx SmartPost settings are enabled if you are enrolled in the FedEx SmartPost program. The Delivery Confirmation checkboxes for each FedEx SmartPost service will display as read only on the SmartPost Settings tab for User Level View and Field Access Privileges. For Support and Development Access Privileges, the Delivery Confirmation checkboxes will be editable.
See the FedEx Ship Manager® Server Developer Guide for instructions on how to configure settings for optional FedEx SmartPost service.

Saving and Closing the FedEx Ship Manager Server Configuration Utility
If you click the Close button ( ) to close the FSMS Configuration Utility, then the data you entered will not be saved. You must click Apply or Apply and Exit to save your entries. Clicking Apply saves your changes and leaves the FSMS Configuration Utility open. Apply and Exit saves your changes, then closes the utility.

Troubleshooting

HelpMe FedEx
To help resolve problems, FedEx Help Desk representatives can initiate remote access to your FSMS system using the GoToAssist tool. When you establish a GoToAssist session, the FedEx Help Desk representatives can perform the following services:
• Communicate with you via a chat window
• View your desktop and optionally enable you to view the Help Desk representative’s desktop
• Use the draw, highlight, and laser pointer tools on the shared desktop
• Share control of the mouse and keyboard
• Use a whiteboard feature for real-time collaboration
• Push Web pages
• Send and receive files
• Reboot and reconnect to your computer
• Transfer a session to an escalation desk
• Use diagnostic tools to retrieve key information on the status of your computer

To initiate a GoToAssist session:
• In the FedEx Ship Manager folder on your desktop, double-click the HelpMe FedEx icon.
Troubleshooting Permissions

FedEx Ship Manager Server relies on Windows for basic services. You must create a Windows User Account that has administrative permissions, including the permission to logon as a service, to successfully run FSMS. See “Setting Windows Administrator User Rights” on page 1-7.

The following procedure describes how to verify the status of FSMS services.

Note: The steps in this troubleshooting procedure focus on the Fedex Admin service because that service must be started before the other FedEx services can run. If you find and fix a problem with how the Fedex Admin service is configured, then you must make sure that all the FedEx services are configured the same.

To verify the status of FedEx Ship Manager Server services:

2. Double-click Administrative Tools to display the administrative tools, and then double-click Services. The Services interface appears. On some computers, you might need to switch to Classic View in the Control Panel to show the Administrative Tools program.
3. The right pane of the Services interface shows the server process on the computer. Scroll down the list to display the FedEx services.
4. Check the Status column for each FedEx service to make sure it shows as Started.
5. If the Status does not show as Started, right-click the Fedex Admin service to display the pop-up menu, and then click Start. However, the FedEx services are set to start when your system is started so it is likely that attempting to manually start a service will fail. In this case, continue to the next step.
6. Right-click the Fedex Admin service to display the pop-up menu and then click Properties. The Properties dialog box appears.
7. On the General tab, make sure that Startup Type is set to Automatic.
8. On the Log On tab, make sure that the specified account is the same one that you used to log into the system. If you logged into the system using a different user name and password, then log out and then log in again using the account that is specified to start the FedEx services.
9. If you logged into the system using the correct account, then check the following settings:
   – In the Log On tab of the properties dialog box, make sure that you have the correct password configured by retyping it in the Password and the Confirm Password fields.
   – Make sure that account has administrator privileges. You can check this in Control Panel > User Accounts.
10. When you have verified all of your settings, restart the computer, login using the FedEx administrator account that you configured for the FedEx services, and then click Control Panel > Administrative Tools > Services to verify that the FedEx services are running.

Troubleshooting Printer Problems

If you are having trouble printing labels or reports from FSMS, then first verify that Windows can communicate with your printers. To do so, simply create a short document in Windows Notepad and then print it from Notepad. If your printer is properly configured, then you will be able to select the printer in the Print dialog box. If you cannot see the printer, then reinstall the printer according to the printer manufacturer’s documentation.

Verifying Communications Using the CommSetup Utility

If you suspect that your shipping client cannot communicate with the FSMS, or that FSMS cannot communicate with FedEx, then use the FedEx CommSetup Utility to test the communications path between FedEx and your FSMS software. To launch the CommSetup Utility:

1. Open the FSMS folder on your desktop, open the Utilities folder, then double-click CommSetup.
2. When the CommSetup Utility opens, configure the connection settings to match your network access requirements, then click Test Internet Connection to FedEx.
You can also test the communications path by using the Demand Download Utility to refresh your local files. For details, see “Using the Demand Download Utility” on page 3-2. Or you could create a series of transactions to test the “round trip” communications with FedEx. Be sure that your test transactions do not initiate any revenue or customs actions. For example, you can initiate a tracking operation (transaction code 042) using a fictitious tracking number.

### How to Select a Printer

Setting up printers for FSMS includes the following steps:

1. Install and configure the printer you select by following the manufacturer’s instructions. See page 1-3 for a list of the printers supported by FSMS.
2. Define the printer to be used by each label and report as described in “Configure Printers for Reports and Labels” on page 2-59.

### Ways to Set Up Printers

Your printers must be installed to work with the Windows operating system. If the computer where you have installed FSMS can communicate with a supported printer, then you can use that printer for FSMS printing operations. You can define different default printers and settings for each report and label you print.

See your printer and Windows documentation for information on how to install your printers. See page 1-3 for a list of thermal, dot matrix and laser printers supported within FSMS.

See “Configuring Laser and Thermal Air Waybill Defaults” on page 2-15 for information on how to define the defaults for printing reports and labels.

### Printing to a Windows-Based Print Share Network

If your label printer is connected to a Windows-based computer, you can print a label to the printer without adding the printer driver to your FSMS server. To do this, you must add a field to your FSMS transactions. Complete the following steps to use a Windows-based print share network:

1. Connect the label printer to the Windows-based computer.
2. Configure the printer using the standard Windows steps for printer configuration.
3. Use the printer’s Properties > Security tab to add the User account that you use to run FSMS. That User account must be configured on the computer that hosts the printer and the password must be the same as it is on the FSMS server.

### Configure Printers for Reports and Labels

#### Labels

FedEx Ship Manager Server supports a variety of label options, including thermal, plain paper and customizable labels. After you have configured a printer on your Windows system, use the Label Settings tab and the Report Settings tab to define a default printer for each type of label and report.

The following thermal label sizes are supported by FSMS:

- 4" x 6"
- 4" x 8"
- 4" x 9"

Thermal labels are available with document tabs (doc-tabs) that can be configured with shipment detail. See “Configuring Laser and Thermal Air Waybill Defaults” on page 2-15 for information on how to define the default printer for different labels.

You can also specify the printer ID and type in a shipping transaction, which overrides the default printer setting. See the FedEx Ship Manager® Server Developer Guide for information on setting up shipping transactions.
Chapter 2: Configuration of FedEx Ship Manager Server

Reports
You can individually configure each report and save it to any directory and, with the exception of the End-of-Day Report, to print on any printer. See "Configuring Report Settings" on page 2-10 for information on how to define the default printer for different reports.

Report Viewer Utility
The Report Viewer Utility enables you to view, print and export Close reports and Shipment Reports. The Report Viewer organizes the reports by meter number.

Note: Use the FedEx SmartPost option on the Close reports area of the Report Viewer Utility to print FedEx SmartPost Detail and Manifest reports. See the FedEx Ship Manager® Server Developer Guide for instructions on how to print Fedex SmartPost reports.

To open the Report Viewer Utility:
• Navigate to the FedEx Ship Manager Server folder on your desktop and double-click the Report Viewer icon. The Report Viewer appears.

Next Steps
FedEx Ship Manager Server communicates directly with FedEx to receive updated rate information, packing routing rules and other information required for shipping activities. See “FedEx Rate and Data Downloads” on page 3-1 to find out more about how FSMS communicates with FedEx.
FedEx Ship Manager® Server (FSMS) uses reference files that it gets directly from FedEx®. If you have performed a meter registration, then you should have all of the files you need. The Demand Download Utility enables you to manually update your FSMS system with the most current information from FedEx. FedEx Ship Manager Server also checks for updated files automatically.

### Download Basics

FedEx Ship Manager Server communicates with FedEx to obtain updated information required for shipping operations. A download operation can retrieve some or all of the following types of information.

- Express Domestic Rates/Discounts
- Express International Rates/Discounts
- ODA/OPA
- Express Earned Discounts
- EU Postal Surcharge
- Express Domestic List Rates
- Express International List Rates
- Ground Earned/Discount Rates — available only at the master meter level
- Ground List Rates
- SmartPost Rates
- SmartPost List Rates
- SmartPost Earned Discounts
- Tracking Numbers — available only for FedEx Express® shipping
- URSA Table
- ESRG Data
- Software — available only for the master meter
- Shipping Tables — available only for the master meter
- Maintenance — available only for the master meter

### What Files Do You Need

FedEx Ship Manager Server requires several data files for routing, rating, and tracking number management, as well as software updates that must be transmitted as changes are made to these files. These files are automatically updated and downloaded to your server if they have been staged by FedEx. You can also download these files on demand, for example, if you need a new tracking number range.

### How Often to Download

Downloading updated information from FedEx happens automatically each day at the Reconcile Time, a setting on the System Settings tab. Registering a meter also causes a download. Typically, a manual download is not required during normal operations.
What is an URSA File

The Universal Routing and Sorting Aid (URSA) for FedEx Express shipments is one of the files that you download from FedEx. A single URSA file is used by all meters. FedEx Ship Manager Server uses the URSA file to validate service offerings and to provide routing codes that direct a shipment through the delivery network. The URSA file is updated at least monthly by FedEx and is downloaded during the normal download operations when new routing information is available.

Ways to Download FedEx Files

FedEx Ship Manager Server can receive downloads through any of the following methods:

- As part of the nightly reconcile process
- As part of a transaction request
- As part of a meter registration
- Manually through the Demand Download Utility

About Automatic Downloads

When you configure your FSMS server, you specify the Reconcile Time on the System Settings tab. The Reconcile Time is when your server communicates with FedEx to download any new components, such as rates, URSA information, new tracking numbers and other required information.

The Reconcile Time defaults to 0300 but you can configure it for a time when there is no server activity. Note that you cannot set the Reconcile Time to 0000.

Using FedEx Ship Manager Server Transaction Requests

You can use a FedEx transaction to initiate download operations. For example:

<table>
<thead>
<tr>
<th>Transaction</th>
<th>Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>057/157</td>
<td>Demand Download Request/Reply</td>
<td>Provides the same functionality as the Demand Download Utility. The Download Flag field allows you to indicate which download or downloads you wish to perform.</td>
</tr>
</tbody>
</table>

For more information about transactions, see the FedEx Ship Manager® Transaction Coding Reference Guide and the FedEx Ship Manager® Server Developer Guide.

Using the Demand Download Utility

FedEx Ship Manager Server requires several data files for routing, rating and tracking number management, as well as software updates that must be transmitted as changes are made to these files. These files are automatically updated and downloaded to your server during Reconcile if they have been staged by FedEx. If you need to have files updated prior to system Reconcile (for example, if you need a new tracking number range), you may use the Demand Download Utility to initiate the request.

To run the Demand Download Utility:

1. Navigate to the FedEx Ship Manager Server folder on your desktop and double-click the FSMS Demand Download icon. The FedEx Demand Download dialog box appears (see Figure 3-1).
2. In the Meter/Account list, click the meter for which you want to perform a download.
3. Select the checkbox next to each of the items you want to download. If an item is not available for the selected meter, it is dimmed. URSA Table, Software, Shipping Tables, and Maintenance items are loaded for the master meter only. You can download FedEx Express rates and tracking numbers, if necessary, for each individual meter in your list (both master and child).

Select from the following downloadable files:
- Express Domestic Rates/Discounts
- Express International Rates/Discounts
- ODA/OPA
- Express Earned Discounts
- EU Postal Surcharge
- Express Domestic List Rates
- Express International List Rates
- Ground Earned/Discount Rates — available only at the master meter level
- Ground List Rates
- SmartPost Rates
- SmartPost List Rates
- SmartPost Earned Discount Rates
- Tracking Numbers — available only for FedEx Express shipping
- Express Tracking Numbers
- SmartPost Delivery Confirmation Numbers
- URSA Table — available only for the master meter, and only for FedEx Express shipping
- ESRG Data
- Software — available only for the master meter
- Shipping Tables — available only for the master meter
- Maintenance — available only for the master meter
- Update Features

Note: Files available only for the master meter are system level components and are not meter-specific.

4. Click Start to download the selected items. FedEx Ship Manager Server displays the FedEx Download Status window so that you can monitor the progress of your download.

When the download is complete, click Exit to close the FedEx Download Status window.

5. To exit the FSMS Demand Download Utility, click Exit.

Note: FedEx Ship Manager Server does not recognize the data you downloaded until you exit the FSMS Demand Download Utility.
Figure 3-1: Demand Download Utility
Chapter 3: FedEx Rate and Data Downloads

Downloading Rates and Discounts

The following procedures describe how to manually update the rates and discounts that you use for FedEx Express and FedEx Ground shipments.

Use the Demand Download Utility to request updated rate and discount information.

To run the Demand Download Utility and download rates and/or discounts:

1. Navigate to the FedEx Ship Manager Server folder on your desktop and double-click the FSMS Demand Download icon. The FedEx Demand Download dialog box appears.
2. In the Meter/Account list, click the meter for which you want to perform a download.
3. Select the Rates checkbox.
4. Select the checkbox next to the FedEx Express rates you want. You can download FedEx Express rates for each individual meter in your list (both master and child).
   - Express Domestic Rates/Discounts
   - Express International Rates/Discounts
   - ODA/OPA
   - Express Earned Discounts
   - EU Postal Surcharge
   - Express Domestic List Rates
   - Express International List Rates
   - Ground Earned/Discount Rates — available only at the master meter level
   - Ground List Rates
   - SmartPost Rates
   - SmartPost List Rates
   - SmartPost Earned Discount Rates
5. Click Start to download the selected items. FedEx Ship Manager Server displays the FedEx Download Status window so that you can monitor the progress of your download. When the download is complete, the FedEx Download Status window closes automatically.
6. To exit the FSMS Demand Download Utility, click Exit.

Note: FedEx Ship Manager Server does not recognize the data you downloaded until you exit the FSMS Demand Download Utility.
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CHAPTER 4: BACKING UP AND RESTORING LOCAL FEDEX DATA

It is important to maintain current backup files of your databases. FedEx Ship Manager® Server (FSMS) has configuration settings that define when to back up your files and where to place the backup data. Make sure that your backup file locations are on a different computer than the one that is hosting the FSMS application. For increased reliability, copy backup files to a remote location as well. It is important to monitor and plan the temp file size based on your purging schedule to ensure that the storage needed for temp files is large enough to accommodate the history being tracked.

Backing Up Your Data

The System Settings tab enables you to define backup and file retention settings.

Database and Backup Settings

Table 4-1 describes the Database settings on the System Settings tab.

<table>
<thead>
<tr>
<th>Setting Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Backup Time</td>
<td>Time each day that FedEx Ship Manager® Server backs up shipping data to the specified directory. Specify the time in the 24-hour (hhmm) format (for example, 0100 equals 1 a.m.).</td>
</tr>
<tr>
<td>1st Backup Directory</td>
<td>Type a directory path or click the Folder icon ( ) to browse and select a directory.</td>
</tr>
<tr>
<td>2nd Backup Directory</td>
<td>Type a directory path or click the Folder icon ( ) to browse and select a directory.</td>
</tr>
</tbody>
</table>

Ship History Settings

Table 4-2 describes the Ship History settings on the System Settings tab.

<table>
<thead>
<tr>
<th>Setting Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Retention Interval</td>
<td>The length of time your FedEx Express® shipping history information is stored by FedEx Ship Manager® Server. Up to 90 days may be selected. Specify the time in the 24-hour (hhmm) format (for example, 1300 equals 1 p.m.).</td>
</tr>
<tr>
<td>Purge Time</td>
<td>The time at which the Ship History files are purged after the retention interval has elapsed. Specify the time in the 24-hour (hhmm) format (for example, 1600 equals 4 p.m.).</td>
</tr>
<tr>
<td>Export Time</td>
<td>The time at which Ship History files are exported after the retention interval has elapsed. Specify the time in the 24-hour (hhmm) format (for example, 1700 equals 5 p.m.).</td>
</tr>
<tr>
<td>Domestic Express</td>
<td>Type a directory path or click the Folder icon ( ) to browse and select a directory.</td>
</tr>
<tr>
<td>International Express</td>
<td>Type a directory path or click the Folder icon ( ) to browse and select a directory.</td>
</tr>
<tr>
<td>International MPS Express</td>
<td>Type a directory path or click the Folder icon ( ) to browse and select a directory.</td>
</tr>
</tbody>
</table>
Chapter 4: Backing Up and Restoring Local FedEx Data

Restoring Your Data

The Retrieve, Retain, Restore (R3) Utility is no longer available. If you need to restore your shipping data, contact your FedEx account executive or FedEx Customer Service representative.

<table>
<thead>
<tr>
<th>Setting Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ground</td>
<td>Type a directory path or click the Folder icon ( ) to browse and select a directory.</td>
</tr>
<tr>
<td>SmartPost</td>
<td>Type a directory path or click the Folder icon ( ) to browse and select a directory.</td>
</tr>
</tbody>
</table>
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