



FedEx® Electronic Trade Documents User Guide for FedEx Ship Manager™ Software



Overview

Welcome to FedEx Electronic Trade Documents. FedEx Ship Manager Software includes this new solution to help streamline the international shipping process. FedEx Electronic Trade Documents enables you to upload and transmit your customs documents electronically so you no longer have to print and attach them to your shipments. You can choose to upload your own customs documents or let FedEx generate documents for you. Either way, they are submitted electronically.

FedEx Electronic Trade Documents allows you to:

- Upload customs documents generated by FedEx, or upload your own customs documents as files or images created on your own systems in your preferred file format (e.g., PDF, Microsoft® Word, Microsoft® Excel, scanned image).
- Submit customs documents without printing paper copies and placing them in the pouch attached to your shipment.
- Add your company letterhead and signature image to the FedEx-generated Commercial Invoice or Proforma Invoice.
- Gain additional time to resolve any difficulties with customs documents before shipment arrival.
- Set preferences to simplify completion of the Customs screen.
- Set defaults for the customs documents you upload.
- Use the feature as needed (can be turned on and off).

Shipping Enhancements for FedEx Electronic Trade Documents

To simplify your international shipping needs even more, FedEx Ship Manager Software has enhanced FedEx Electronic Trade Documents with several new features:

- Electronic submission of FedEx International Ground customs documents gives you more new ways to streamline efforts and increase speed-to-market.
- Submitting customs documents to FedEx for future day shipments as well as current day shipments is quick and easy. You can now set the shipment date for any date from today's date to 10 days in the future.
- Ability to produce end-of-day and ad-hoc reports for FedEx Electronic Trade Documents shipments, including the FedEx Ground Batch Upload Failure Report, FedEx Express Batch Upload Failure Report, FedEx Express ETD Shipment Report and FedEx Ground ETD Shipment Report.

Since FedEx Electronic Trade Documents allows you to submit your international trade documentation electronically, you no longer have to print and attach trade documents to your shipments using FedEx Express international services or FedEx International Ground.

Recommendations

- The FedEx Electronic Trade Documents feature is designed to perform optimally with a high-speed, broadband Internet connection. Dial-up customers with slower data-transfer rates will experience long processing times. The use of FedEx Electronic Trade Documents on a dial-up connection is not recommended.
- FedEx recommends uploading digital letterhead and signature images for use on FedEx-generated documents.
- Although shipments to the destinations enabled for FedEx Electronic Trade Documents can clear customs with an electronically transmitted Commercial Invoice, applicable customs laws, rules and regulations may require additional documentation for certain commodities, values or quantities and/or original hard copy commercial invoices, licenses, or permits. **It is the responsibility of the shipper to know when an original hard copy document is required and to place the original document in the pouch on the package.** Some examples of these documents include, but may not be limited to, the following:
 - Manual B13A Declaration (B13A)
 - Electronic Export Declaration (B13A) when accompanied by an export permit
 - Export Permit (Must be provided when exporting controlled restricted/prohibited goods)
 - Cites Certificate (Must be provided when exporting endangered species of wild fauna and flora)
 - Kimberley Certificate (Must be provided when exporting rough diamond.)
 - E667 Forms (Must be provided when exporting monetary instruments of a value greater than 10,000 CAD)

Available Countries /Territories

FedEx Electronic Trade Documents is currently available for shipments originating in Canada and destined to the following countries/territories.

AF	Afghanistan	IN	India
AL	Albania	IT	Italy
AT	Austria	JP	Japan
AU	Australia	KR	Korea
BB	Barbados	LT	Lithuania
BE	Belgium	LU	Luxembourg
BH	Bahrain	LV	Latvia
BM	Bermuda	MO	Macau
CH	Switzerland	MX	Mexico
CN	China	MY	Malaysia
CY	Cyprus	NL	Netherlands
CZ	Czech Republic	NO	Norway
DE	Germany	NZ	New Zealand
DK	Denmark	PH	Philippines
EE	Estonia	PR	Puerto Rico
ES	Spain	PS	Palestine
FI	Finland	PT	Portugal
FR	France	SE	Sweden
GB	Great Britain	SG	Singapore
HK	Hong Kong	SI	Slovenia
HR	Croatia	SK	Slovak Republic
HU	Hungary	TH	Thailand
IE	Ireland	US	United States
IL	Israel	ZA	South Africa

FedEx Electronic Trade Documents is currently available for the following services:

- FedEx International Priority*
- FedEx International Economy*
- FedEx International Priority Freight
- FedEx International Economy Freight
- FedEx International First™
- FedEx International Ground™
- Future day shipments

Please note that FedEx Electronic Trade Documents is currently not available for the following FedEx services or shipment types:

- FedEx International Priority DirectDistribution*
- FedEx Transborder Distribution* (FedEx International DirectDistribution Surface Solutions)
- Group shipping
- Dangerous goods and dry ice shipments

Enabling FedEx Electronic Trade Documents

To enable FedEx Electronic Trade Documents, follow these steps:

1. From the Customize drop-down menu, select **System Settings**. The System Settings – System/Account screen displays.
2. Select the appropriate System # and click **Modify**. The System Settings screen displays.
3. Click the **1-Your System Settings** tab.
4. In the Trade Documents section at the bottom of the screen, select the **Activate Electronic Trade Documents** check box. The Electronic Trade Documents – Terms and Conditions screen displays (if needed, you can deactivate the feature. Simply deselect the Activate Electronic Trade Documents check box.
5. Click the **I accept the terms and conditions** check box and click **OK**, if you agree to the terms and conditions.
6. In the Communications Settings area, click **At time of shipment** or **At regular hourly upload time (in batch)**.

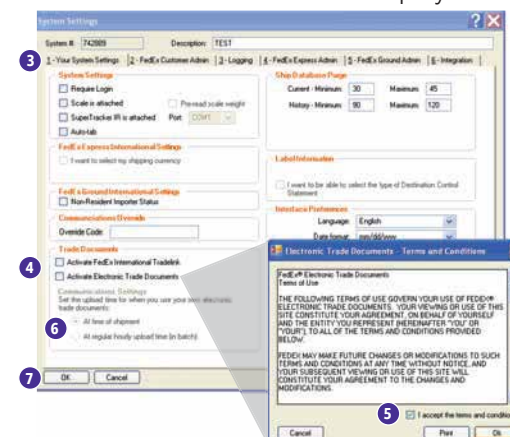
The option **At time of shipment** is the default and is the preferred setting, as it gives you immediate confirmation that your documents have been successfully uploaded or notification of any problems. If problems occur, you can take immediate action to resolve the issue.

The option **At regular hourly upload time (in batch)** gives you a warning message at the time of the hourly upload if there was a document upload failure for one or more of your shipments. If you do not complete the shipment when you

receive the warning message, you must remember to review the FedEx Electronic Trade Documents Shipped List in time to complete the process before the courier arrives.

Note: Customs delays may result if there is a document upload failure and the label and documents are not handed to the courier at pickup.

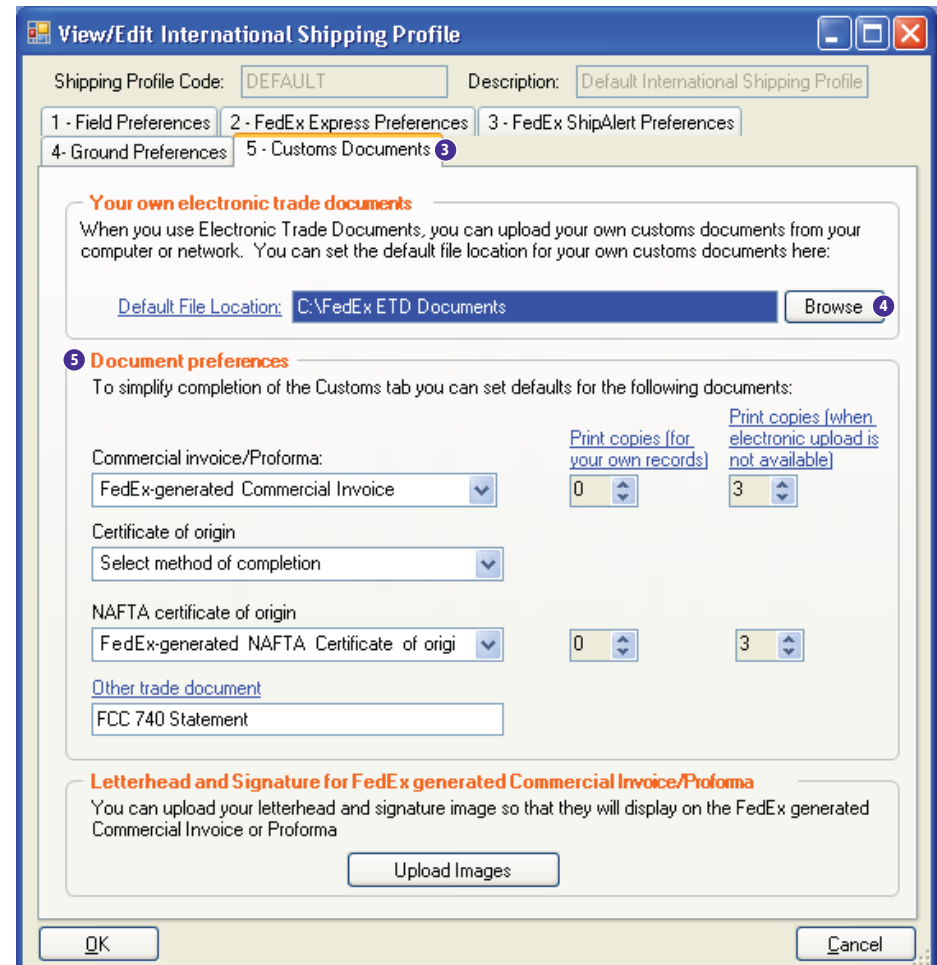
7. Click **OK**. A dialog displays advising you that certain countries /territories require a company letterhead and a signature on the Commercial Invoice. You can go to the View/Edit International Shipping Profiles screen now or later to upload images. Many countries/territories require the letterhead and signature for electronic documents, so it is important that you upload these prior to processing shipments.
8. If you choose to provide images later, the dialog closes. If you choose to go to the View/Edit International Shipping Profiles screen now, the dialog closes and the View/Edit International Shipping Profiles screen for FedEx Electronic Trade Documents displays.



Setting Preferences

To set preferences, follow these steps:

1. From the Customize menu, select **Shipping Profiles**. The Shipping Profiles screen displays.
2. Select the appropriate international shipping profile. For most users, this is the **Default International Shipping Profile**. Click **View/Edit**. The View/Edit International Shipping Profiles screen displays.
3. Click the **5-Customs Documents** tab.
4. If you plan to upload your own electronic documents and store these documents in a particular folder, you can set a default to go directly to that folder. In the Your own electronic trade documents section, click **Browse** and select a default file location (this will be used when you are browsing to select your own documents for uploading).
5. In the Document preferences section, select your electronic document preferences. This allows you to indicate whether you will use your own documents or documents generated by FedEx.



View/Edit International Shipping Profile

Shipping Profile Code: **DEFAULT** Description: **Default International Shipping Profile**

1 - Field Preferences 2 - FedEx Express Preferences 3 - FedEx ShipAlert Preferences
4 - Ground Preferences 5 - Customs Documents **3**

Your own electronic trade documents
When you use Electronic Trade Documents, you can upload your own customs documents from your computer or network. You can set the default file location for your own customs documents here:

Default File Location: **C:\FedEx ETD Documents** **Browse** **4**

5 Document preferences
To simplify completion of the Customs tab you can set defaults for the following documents:

Commercial invoice/Proforma: **FedEx-generated Commercial Invoice** **Print copies (for your own records)** **0** **Print copies (when electronic upload is not available)** **3**

Certificate of origin: **Select method of completion**

NAFTA certificate of origin: **FedEx-generated NAFTA Certificate of origin** **0** **3**

Other trade document
FCC 740 Statement

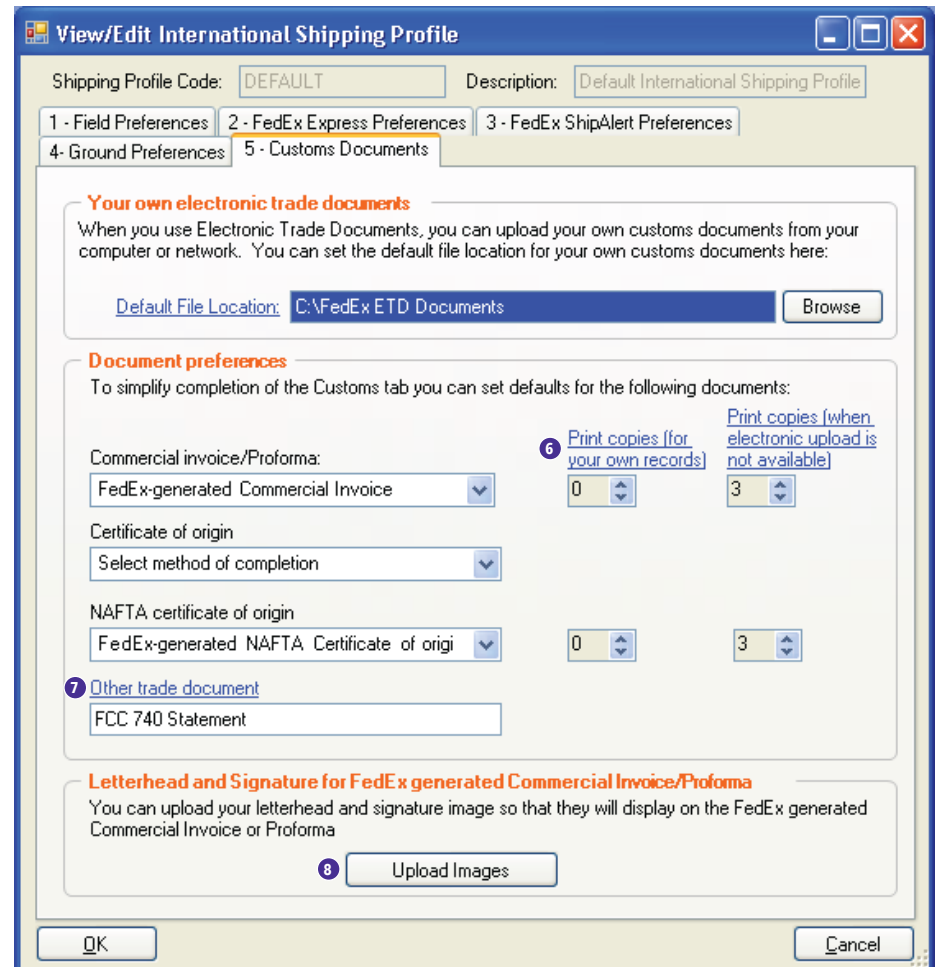
Letterhead and Signature for FedEx generated Commercial Invoice/Proforma
You can upload your letterhead and signature image so that they will display on the FedEx generated Commercial Invoice or Proforma

Upload Images

OK **Cancel**

Setting Preferences (continued)

6. If you select documents generated by FedEx, you have the option of indicating how many copies to print.
 - Under Print copies (for your own records), you can select the number of copies you would like to print for your own internal records when you process a shipment. It is not necessary to print and attach these documents to the package.
 - Under Print copies (when electronic upload is not available), you can select the number of copies you would like to print for shipments where the FedEx Electronic Trade Documents feature is not used. Since FedEx Electronic Trade Documents is not available for all countries/territories and services at this time, a message will display on the Customs screen advising you when the feature is not available. For these shipments, you need to print paper copies of the customs documents and place them in the pouch attached to your shipment.
7. If you have another trade document that you usually include with your shipments, you can enter the document name in the Other trade document section. That document name then appears on the Customs screen as a visual reminder that this is a document you may need to include with certain shipments. If you choose to provide images later, the dialog closes.
8. In the Letterhead and Signature for FedEx generated Commercial Invoice/Proforma section, click **Upload Images**. The Upload images screen displays.



View/Edit International Shipping Profile

Shipping Profile Code: **DEFAULT** Description: **Default International Shipping Profile**

1 - Field Preferences 2 - FedEx Express Preferences 3 - FedEx ShipAlert Preferences
4 - Ground Preferences 5 - Customs Documents

Your own electronic trade documents
When you use Electronic Trade Documents, you can upload your own customs documents from your computer or network. You can set the default file location for your own customs documents here:

Default File Location: **C:\FedEx ETD Documents** **Browse**

Document preferences
To simplify completion of the Customs tab you can set defaults for the following documents:

Commercial invoice/Proforma: **FedEx-generated Commercial Invoice** **6** **Print copies (for your own records)** **0** **Print copies (when electronic upload is not available)** **3**

Certificate of origin: **Select method of completion**

NAFTA certificate of origin: **FedEx-generated NAFTA Certificate of origin** **0** **3**

7 **Other trade document**: **FCC 740 Statement**

Letterhead and Signature for FedEx generated Commercial Invoice/Proforma
You can upload your letterhead and signature image so that they will display on the FedEx generated Commercial Invoice or Proforma

8 **Upload Images**

OK **Cancel**

Setting Preferences (continued)

9. Use images of your letterhead and signature. Hardcopies of your letterhead and signature can be scanned to create these images. Note that the image files must be in GIF or PNG file format and must have the following attributes:

- Letterhead images should be no larger than 7.5 by 1.6 inches or 720 pixels wide by 154 pixels high.
- Signature images should be no larger than 3.5 by 0.5 inches or 336 pixels wide by 48 pixels high.

Note: Images larger than these dimensions are automatically resized to fit and could be distorted, rendering your letterhead and signature illegible.

10. In the Company letterhead image section, click **Browse** to select the appropriate letterhead image file.
11. For your letterhead, select how to apply the image from the **Apply to countries** drop-down menu. You can choose to apply your letterhead only to documents for shipments to countries territories where a letterhead is required or apply to all shipments. FedEx recommends that you apply your letterhead to your documents for all shipments.
12. In the Signature image section, click **Browse** to select the appropriate signature image file.
13. Select the **Always apply signature** check box to apply the signature to all shipments.
14. If you want to remove the image, click **Remove**. If you want to replace the image, click **Remove** and then click **Browse** to select a new image.

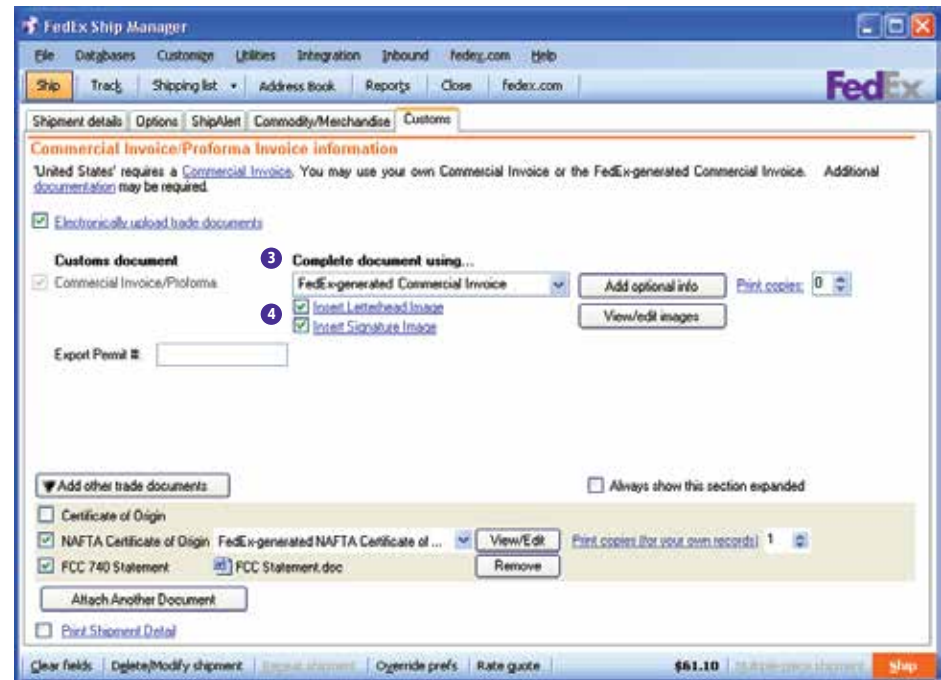
*Note: If you are currently printing the Commercial Invoice generated by FedEx on your letterhead by placing your stationery in the printer, you need to revise this setting. Select **Forms** from the Customize drop-down menu. When the Forms Settings screen displays, select **Reports** in the Form settings section. In the Commercial Invoice letterhead settings Paper type section, click the **Plain paper** radio button. Click **OK**.*

15. To save your preferences, click **OK** on this screen and all subsequent Shipping Profile screens.

Processing Shipments Using FedEx Electronic Trade Documents

To process shipments using your FedEx Electronic Trade Documents preferences, follow these steps:

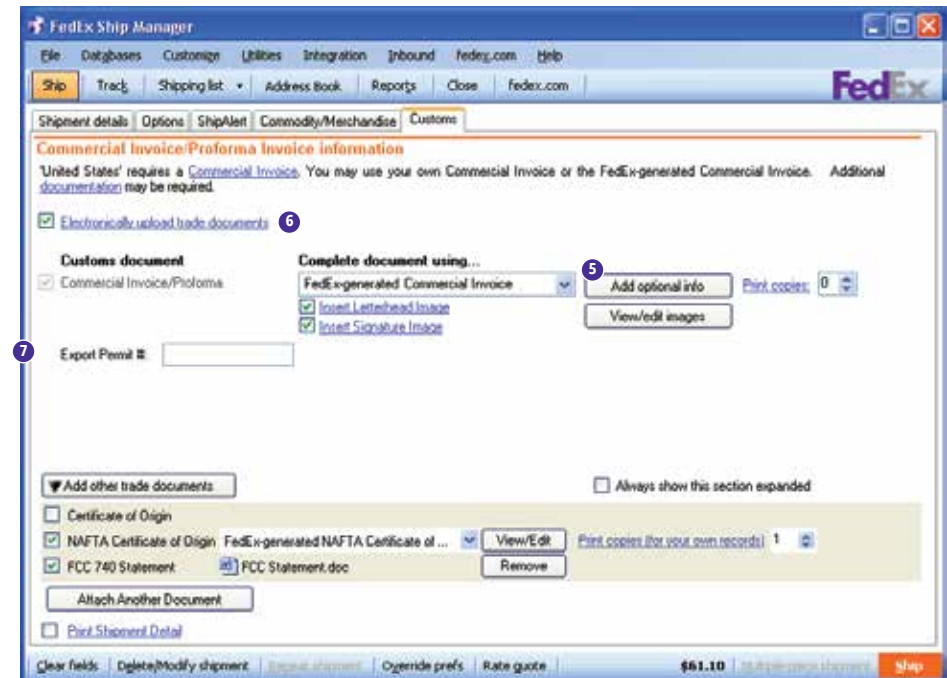
1. Complete the Shipment Details, Options and Commodity/Merchandise screens.
2. On the Customs screen, the following messages may display:
 - The Commercial Invoice message displays at the top of the screen to provide you with information on specific requirements for the destination country/territory.
 - If the shipment is eligible, the Electronically Upload Trade Documents check box displays below this message and defaults to checked.
 - If the destination is not FedEx Electronic Trade Documents eligible, the upload options are not available and a statement displays with information on why the shipment is not FedEx Electronic Trade Documents eligible.
3. You can select **FedEx-generated Commercial Invoice** or **FedEx-generated Proforma Invoice** .
 - For eligible shipments – the Print copies drop-down menu allows you to print copies for your own record.
 - For shipments not eligible – the Print copies drop-down menu allows you to print copies to attach to the package.
4. If you set preferences for your images, the Insert Letterhead Image and Insert Signature Image check boxes are selected automatically. If they are not selected, select these check boxes as applicable. Click **View/Edit images** to select or change the image.



Processing Shipments Using FedEx Electronic Trade Documents (continued)

5. Click **Add optional info** to provide additional information. You can perform several actions, including selecting terms of sale, entering additional charges, and including a NAFTA statement. Click **View/Edit importer** to change the importer information if required.
6. If you select to upload your own documents, you can browse and upload those documents as needed.
7. If required for your shipment, complete the following export fields:
 - Export Permit Number
 - B13A Export Declaration option

Note: The B13A Export Declaration cannot be electronically transmitted with the shipment. It must be printed, stamped and attached to your shipment, or sent electronically using the Canadian Automated Export Declaration (CAED) provided by Statistics Canada.



Processing Shipments Using FedEx Electronic Trade Documents (continued)

8. If necessary, click **Add other trade documents** to attach a NAFTA Certificate of Origin. For eligible NAFTA Certificate of Origin shipments, use the drop-down menu to indicate whether you are using your own document or a FedEx-generated version of the document. For FedEx-generated documents, you can select the number of copies to print. If you select **FedEx-generated NAFTA Certificate of origin** from the drop-down menu, click **View/Edit** and provide the required information.
9. For eligible shipments, you can attach another document that you have saved on your own system by clicking **Attach Another Document** and selecting the appropriate document from the resulting screen.
10. Select the **Print Shipment Detail** check box to print the shipment details.
11. Click **Ship** to process your shipment.

The screenshot shows the FedEx Ship Manager interface with the 'Customs' tab selected. The 'Commercial Invoice/Proforma Invoice information' section displays details for a 'United States' shipment, including a note that a 'Commercial Invoice' is required. The 'Customs document' section shows 'Commercial Invoice/Proforma' selected, with options to 'Add optional info' and 'Print copies'. The 'Add other trade documents' section is expanded, showing a list of documents: 'Certificate of Origin', 'NAFTA Certificate of Origin' (selected), and 'FCC 740 Statement'. The 'NAFTA Certificate of Origin' is set to 'FedEx-generated NAFTA Certificate of ...' with a 'View/Edit' button. The 'FCC 740 Statement' is set to 'FCC Statement.doc' with a 'Remove' button. The 'Attach Another Document' button is also visible. At the bottom, the 'Print Shipment Detail' checkbox is checked. The 'Ship' button is located at the bottom right of the interface.

Processing Shipments Using FedEx Electronic Trade Documents (continued)

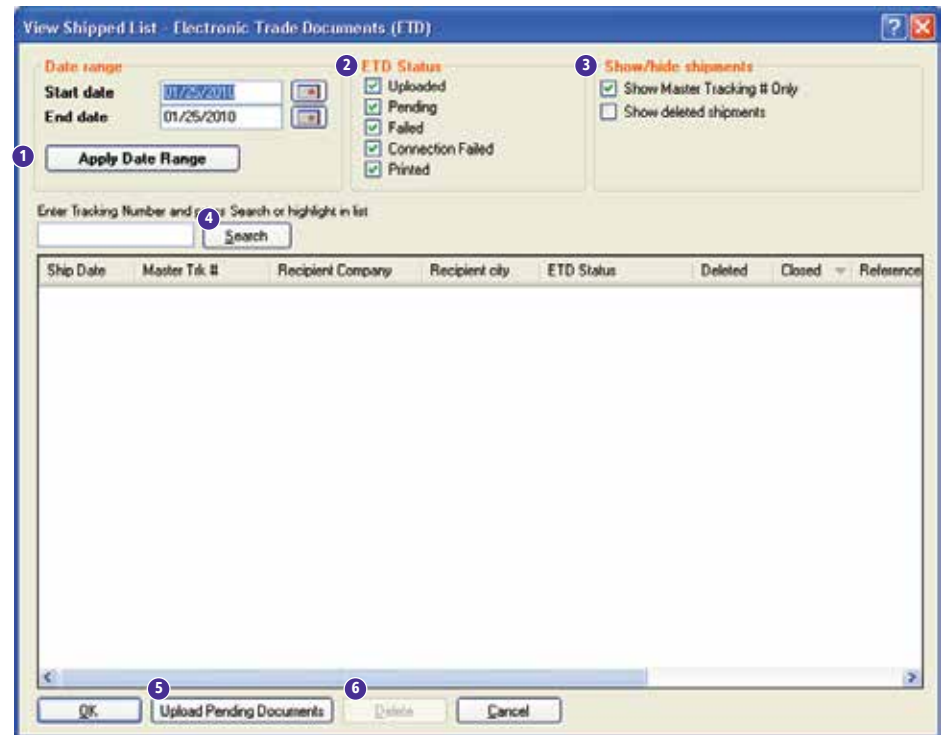
12. If you had selected the **At time of shipment** document upload option on the System Settings screen, the system will upload and transmit the designated documents.
- If the upload is successful, a shipping label is printed.
 - If an upload is not successful, a message displays explaining why the upload failed and allows you to try again, revise the selections or manually print and attach your documents.
13. If you had selected the **At regular hourly upload time (in batch)** document upload option on the System Settings screen, the following options are available:
- System displays a warning message at time of upload if one or more shipments contain documents that did not upload. You have the option to go the FedEx Electronic Trade Documents Shipped List then or choose to complete the shipment later.
 - You can access the FedEx Electronic Trade Documents Shipped List to view the status of uploads.
 - Shipments display in the FedEx Electronic Trade Documents Shipped List with a status of either Uploaded, Pending, Failed or Printed.

Note: If an upload is not successful, click the Failed status link. A message displays explaining why the upload failed and allows you to complete the shipment later or manually print the label and your documents to give to the courier. Once you print the documents, the status changes to Printed.

FedEx Electronic Trade Documents Shipped List

To access the FedEx Electronic Trade Documents Shipped List, select **ETD** from the Shipping List menu. The View Shipped List – Electronic Trade Documents (ETD) screen displays. Your shipments display on both the FedEx Electronic Trade Documents and International shipped lists.

1. In the Date range section, select the date range for shipments to display and click **Apply Date Range**.
2. Check the status options to display in the **ETD Status** section. Click the status link in the **ETD Status** column to see a list of documents attached to the shipment.
3. Check the shipment options in the Show/hide shipments section to display.
4. Enter a tracking number in the Search field and click **Search** to highlight the number in the list.
5. If you want to manually upload documents now that are scheduled to upload at the regular hourly upload time (in batch), click **Upload Pending Documents**.
6. Highlight the shipment and click **Delete** to delete it. The status changes to Deleted on both lists.



Checklist for Using FedEx-generated Commercial Invoice or Proforma Invoice

If you choose to upload the FedEx-generated Commercial Invoice or Proforma Invoice, please review the following checklist.

- ☐ Most countries/territories that accept FedEx Electronic Trade Documents shipments either recommend or require that the Commercial Invoice or Proforma Invoice be signed and on your company letterhead. Upload your letterhead and signature before you begin using this feature.
- ☐ If you are currently printing the FedEx-generated Commercial Invoice on your company letterhead by placing your stationery in the printer, you need to revise this setting. Select **Forms** from the Customize drop-down menu. When the Forms Settings screen displays, select **Reports** in the Form settings section. In the Commercial Invoice letterhead settings Paper type section, click the **Plain paper** radio button. Click **OK**.
- ☐ FedEx Electronic Trade Documents functionality is not available for all countries/territories and services at this time. A message displays on the Customs screen advising you when it is not available. For these shipments, you need to print paper copies of customs documents and place them in the pouch attached to your shipment.

Optional settings to save you time are as follows:

- ☐ You can set your preferences so that the FedEx-generated document is always selected for you on the Customs screen.
- ☐ If you need to keep copies of the FedEx-generated Commercial Invoice for your own internal records, you can set a preference for the number of copies you want to print.
- ☐ You can set a preference for the number of copies you want to print when FedEx Electronic Trade Documents functionality is not available, so that it is always selected for you on the Customs screen.

Checklist for Uploading Your Own Trade Documents

If you wish to upload your own documents instead of using FedEx-generated documents, please review the following checklist:

- ☐ You must have access to those documents via hard drive, USB drive or other means while you process your shipment using FedEx Ship Manager Software.
- ☐ Ensure that you are using unique file names for each of your documents, so the shipper can easily identify and select the correct documents for each shipment. For example, you might want to use a unique PO Number or reference number and possibly include the ship date or other information in the file name. If an incorrect document is uploaded, customs delays may occur.
- ☐ If you keep all of your documents in one file folder, you can use the Default File setting in the Customs International Profile Preferences so the shipper is taken directly to that file when they click **Browse** on the Customs screen.
- ☐ If you do not keep all of your documents in one file folder, do not use the default setting. The shipper is always taken to the last selected file path.
- ☐ For countries/territories that require a company letterhead and signature, your letterhead and signature must be included on the document you are uploading.
- ☐ Ensure that you have a process for printing and attaching your own documents in situations where the FedEx Electronic Trade Documents feature is not available or the document upload fails.

*Note: Applicable customs laws, rules and regulations may require additional documentation for certain commodities, values or quantities and/or that original hard copy commercial invoices, licenses, or permits. **It is the responsibility of the shipper to know when an original hard copy document is required and to place the original document in the pouch on the package.** Some examples of these documents include, but may not be limited to, the following:*

- Manual B13A Declaration (B13A)
- Electronic Export Declaration (B13A) when accompanied by an export permit
- Export Permit (Must be provided when exporting controlled restricted/prohibited goods)
- Cites Certificate (Must be provided when exporting endangered species of wild fauna and flora)
- Kimberley Certificate (Must be provided when exporting rough diamond.)
- E667 Forms (Must be provided when exporting monetary instruments of a value greater than 10,000 CAD)