Legal and Copyright Notices

Payment
You must remit payment in accordance with the FedEx Service Guide, tariff, service agreement or other terms or instructions provided to you by FedEx from time to time. You may not withhold payment on any shipments because of equipment failure or for the failure of FedEx to repair or replace any equipment.

Inaccurate Invoices
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 guarantee. FedEx may suspend any applicable money-back guarantee in the event of equipment failure or if it becomes inoperative.

Confidential and Proprietary
The information contained in this guide is confidential and proprietary to FedEx Corporate Services, Inc. and its affiliates (collectively “FedEx”). No part of this guide may be distributed or disclosed in any form to any third party without written permission of FedEx. This guide is provided to you and its use is subject to the terms and conditions of the FedEx Automation Agreement. The information in this document may be changed at any time without notice. Any conflict between this guide, the FedEx Automation Agreement and the FedEx Service Guide shall be governed by the FedEx Automation Agreement and the FedEx Service Guide, in that order. © 2013 - 2014 FedEx. FedEx and the FedEx logo are registered service marks. All rights reserved. Unpublished.

Disclaimer
All Improper Transaction scenarios are for example only. They do not reflect all error condition scenarios.
# Contents

<table>
<thead>
<tr>
<th>Section</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>Contents</td>
<td>3</td>
</tr>
<tr>
<td>Figures</td>
<td>5</td>
</tr>
<tr>
<td>Tables</td>
<td>8</td>
</tr>
<tr>
<td>About This Document</td>
<td>9</td>
</tr>
<tr>
<td>1  Installation of FedEx Ship Manager Server</td>
<td>11</td>
</tr>
<tr>
<td>1.1 System Requirements</td>
<td>11</td>
</tr>
<tr>
<td>1.2 Before You Begin Installation</td>
<td>15</td>
</tr>
<tr>
<td>1.3 How to Install FedEx Ship Manager Server</td>
<td>19</td>
</tr>
<tr>
<td>1.4 Uninstalling the FedEx Ship Manager Server</td>
<td>48</td>
</tr>
<tr>
<td>2  Configuration of FedEx Ship Manager Server</td>
<td>50</td>
</tr>
<tr>
<td>2.1 Privileges and Access</td>
<td>50</td>
</tr>
<tr>
<td>2.2 Before You Begin Configuration</td>
<td>51</td>
</tr>
<tr>
<td>2.3 About Managing Meters</td>
<td>52</td>
</tr>
<tr>
<td>2.4 Using the FedEx Configuration Utility</td>
<td>54</td>
</tr>
<tr>
<td>2.5 Configuring Shipper Settings</td>
<td>57</td>
</tr>
<tr>
<td>2.6 Configuring Report Settings</td>
<td>64</td>
</tr>
<tr>
<td>2.7 Configuring System Settings</td>
<td>73</td>
</tr>
<tr>
<td>2.8 Configuring Meter Settings</td>
<td>76</td>
</tr>
<tr>
<td>2.9 About FedEx SmartPost Configuration</td>
<td>98</td>
</tr>
<tr>
<td>2.10 Configuring Advanced Settings</td>
<td>123</td>
</tr>
<tr>
<td>2.11 IPD / IED / IDF Configuration Settings</td>
<td>127</td>
</tr>
<tr>
<td>2.12 Configuring Tracking Numbers</td>
<td>129</td>
</tr>
<tr>
<td>2.13 FedEx SmartPost Delivery Confirmation Numbers</td>
<td>134</td>
</tr>
<tr>
<td>2.14 FedEx SmartPost Returns Tracking Numbers Prefixes</td>
<td>134</td>
</tr>
<tr>
<td>2.15 Troubleshooting Via HelpMe FedEx</td>
<td>134</td>
</tr>
<tr>
<td>2.16 Setting Troubleshooting Permissions</td>
<td>135</td>
</tr>
<tr>
<td>2.17 Troubleshooting Printer Problems</td>
<td>136</td>
</tr>
</tbody>
</table>
## FedEx Ship Manager® Server Installation and Configuration Guide

### 2.18 Verifying Communications Using the CommSetup Utility ...................................................... 137
### 2.19 Selecting a Printer ........................................................................................................... 137

### 3 FedEx Rate and Data Downloads .................................................................................. 140
#### 3.1 Download Basics .......................................................................................................... 140
#### 3.2 Ways to Download FedEx Files ...................................................................................... 141
#### 3.3 Downloading Rates and Discounts ................................................................................. 144

### 4 Backing Up and Restoring Local FedEx Data ............................................................ 146
#### 4.1 Backup functionality ...................................................................................................... 148
#### 4.2 Restore functionality ..................................................................................................... 148
#### 4.3 Support ........................................................................................................................ 151
#### 4.4 Configuring Database Settings ....................................................................................... 153
#### 4.5 Configuring Ship History Settings ............................................................................... 154
Figures

Figure 1. Installshield Screen ................................................................................................................. 20
Figure 2. Requirement to Install FedEx Ship Manager Server v 14.00 ................................................. 21
Figure 3. Enter the Product Key ............................................................................................................. 22
Figure 4. Preparing to Install ................................................................................................................... 23
Figure 5. Choose Installation Type ......................................................................................................... 24
Figure 6. Choose Destination Folder ...................................................................................................... 25
Figure 7. Configuring Microsoft Visual C++ 2005 .................................................................................. 26
Figure 8. Password Screen .................................................................................................................... 27
Figure 9. Ready to Install Program ........................................................................................................ 28
Figure 10. Setup Status Screen Displays During Installation ............................................................... 29
Figure 11. Use Network Dialog Box to Specify Network Connection .................................................. 30
Figure 12. Configure Direct Access ....................................................................................................... 31
Figure 13. Meter Registration Utility .................................................................................................... 32
Figure 14. Adding Additional Meters .................................................................................................... 33
Figure 15. Installation Successful ......................................................................................................... 34
Figure 16. Restarting Your System ...................................................................................................... 34
Figure 17. Meter Registration Activity Window Showing Master Meter Component Status .......... 35
Figure 18. Entering Shipper Location Information ................................................................................ 37
Figure 19. Meter Registration Activity Window ................................................................................... 38
Figure 20. Stop Cluster Service ............................................................................................................ 40
Figure 21. Start Cluster Control Service ............................................................................................... 41
Figure 22. Cluster Administrator View - Addition of Services .............................................................. 42
Figure 23. Services Control Panel, Properties Choice .......................................................................... 43
Figure 24. Possible Owners Screen ..................................................................................................... 44
Figure 25. Dependencies Tab ............................................................................................................... 45
Figure 26. Generic Service Parameters ................................................................................................ 46
Figure 27. Registry Key ........................................................................................................................ 47
Figure 28. Bring Services Online .......................................................................................................... 48
Figure 29. Access Privileges Dialog Box .............................................................................................. 55
Figure 30. Shipper Settings Tab - Field Level View with User Level Access ........................................ 56
Figures

Figure 31. Shipper Settings Tab - Field, Support, and Developer Level View Access ......................... 57
Figure 32. Shipper Settings Tab ........................................................................................................... 58
Figure 33. Close Option button ........................................................................................................ 62
Figure 34. Close Options Dialog ........................................................................................................ 63
Figure 35. Configuring Report Settings ............................................................................................ 65
Figure 36. Selecting Default Report Images ..................................................................................... 69
Figure 37. Laser and Thermal Label Default Settings Groupbox ......................................................... 71
Figure 38. Additional Laser and Thermal Copies Groupbox ............................................................... 72
Figure 39. Set Number of Freight Label Copies .................................................................................. 72
Figure 40. Multi-Ply Printer Defaults .................................................................................................. 73
Figure 41. System Settings Tab ......................................................................................................... 74
Figure 42. Meter Settings Tab ............................................................................................................ 77
Figure 43. Rate Reply Content Options ............................................................................................. 80
Figure 44. FedEx Electronic Trade Documents Terms and Conditions Screen ............................. 85
Figure 45. Digital Letterhead Logo and Digital Signature Message .................................................. 86
Figure 46. Global Returns Allowed Checkbox .................................................................................... 88
Figure 47. FedEx Global Returns - Terms and Conditions Language Selection Screen .................... 89
Figure 48. FedEx Global Returns - Terms and Conditions - English Selection ............................... 90
Figure 49. Software ID Data Capture Dialog Box .............................................................................. 91
Figure 50. Handling Charges Dialog .................................................................................................. 92
Figure 51. New Rating Options on the Meter Settings Tab ................................................................. 96
Figure 52. Discount Options ............................................................................................................... 97
Figure 53. Rating Options on the SmartPost Settings Tab ................................................................. 98
Figure 54. FedEx SmartPost Configuration Settings on SmartPost Settings Tab ............................ 100
Figure 55. SmartPost Settings Tab with SmartPost Returns Enabled Checkbox .......................... 103
Figure 56. Add SmartPost Returns Dialog Box .................................................................................. 104
Figure 57. Tracking Numbers Tab .................................................................................................... 108
Figure 58. Handling Charges Dialog for FedEx SmartPost .............................................................. 110
Figure 59. FedEx Demand Download Utility ...................................................................................... 114
Figure 60. SmartPost Option Selected on the Doc-Tab Settings Tab ................................................ 117
Figure 61. FedEx SmartPost Report Settings Tab ............................................................................. 119
Figure 62. FedEx SmartPost Detailed Report .................................................................................... 120
Figure 63. FedEx SmartPost Manifest Report .................................................................................... 122
Figure 64. FedEx SmartPost Returns Report ...................................................................................... 123
<table>
<thead>
<tr>
<th>Figure</th>
<th>Description</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>Figure 65.</td>
<td>Advanced Settings Tab</td>
<td>124</td>
</tr>
<tr>
<td>Figure 66.</td>
<td>New Options in Advanced Settings Tab</td>
<td>126</td>
</tr>
<tr>
<td>Figure 67.</td>
<td>IPD / IED / IDF Settings Tab</td>
<td>127</td>
</tr>
<tr>
<td>Figure 68.</td>
<td>Add Importer of Record</td>
<td>128</td>
</tr>
<tr>
<td>Figure 69.</td>
<td>Tracking Numbers Tab</td>
<td>129</td>
</tr>
<tr>
<td>Figure 70.</td>
<td>FedEx Ground Tracking Number Composition</td>
<td>131</td>
</tr>
<tr>
<td>Figure 71.</td>
<td>Bonus and Earned Discount Option on the Demand Download Utility</td>
<td>143</td>
</tr>
<tr>
<td>Figure 72.</td>
<td>Backup and Restore Utility</td>
<td>147</td>
</tr>
<tr>
<td>Figure 73.</td>
<td>Restore functionality</td>
<td>149</td>
</tr>
<tr>
<td>Figure 74.</td>
<td>Restore Information</td>
<td>150</td>
</tr>
<tr>
<td>Figure 75.</td>
<td>Support functionality</td>
<td>151</td>
</tr>
<tr>
<td>Figure 76.</td>
<td>Support information</td>
<td>153</td>
</tr>
</tbody>
</table>
## Tables

<table>
<thead>
<tr>
<th>Table</th>
<th>Description</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>Table 1</td>
<td>FedEx Ship Manager Server Minimum Software and Hardware Requirements</td>
<td>12</td>
</tr>
<tr>
<td>Table 2</td>
<td>FedEx Ship Manager Server Recommended Software and Hardware</td>
<td>12</td>
</tr>
<tr>
<td>Table 3</td>
<td>Pre-Installation Checklist</td>
<td>15</td>
</tr>
<tr>
<td>Table 4</td>
<td>Post-Installation Checklist</td>
<td>16</td>
</tr>
<tr>
<td>Table 5</td>
<td>FedEx Ship Manager Server Access Privileges</td>
<td>51</td>
</tr>
<tr>
<td>Table 6</td>
<td>Shipper Settings</td>
<td>58</td>
</tr>
<tr>
<td>Table 7</td>
<td>LTL Freight and Smartpost will have the following access privileges</td>
<td>63</td>
</tr>
<tr>
<td>Table 8</td>
<td>Report List</td>
<td>66</td>
</tr>
<tr>
<td>Table 9</td>
<td>Multi-Ply Air Waybill Form Types</td>
<td>73</td>
</tr>
<tr>
<td>Table 10</td>
<td>System Settings Tab</td>
<td>74</td>
</tr>
<tr>
<td>Table 11</td>
<td>System Settings for Database Backup</td>
<td>75</td>
</tr>
<tr>
<td>Table 12</td>
<td>System Settings for Ship History</td>
<td>76</td>
</tr>
<tr>
<td>Table 13</td>
<td>FedEx Express Options</td>
<td>78</td>
</tr>
<tr>
<td>Table 14</td>
<td>FedEx Ground Options</td>
<td>80</td>
</tr>
<tr>
<td>Table 15</td>
<td>FedEx Freight Options</td>
<td>82</td>
</tr>
<tr>
<td>Table 16</td>
<td>FedEx Electronic Trade Documents Options</td>
<td>83</td>
</tr>
<tr>
<td>Table 17</td>
<td>General Options</td>
<td>83</td>
</tr>
<tr>
<td>Table 18</td>
<td>Software ID Data Capture Fields</td>
<td>91</td>
</tr>
<tr>
<td>Table 19</td>
<td>Meter Settings for Handling Charge Calculations</td>
<td>93</td>
</tr>
<tr>
<td>Table 20</td>
<td>FedEx SmartPost Options</td>
<td>100</td>
</tr>
<tr>
<td>Table 21</td>
<td>FedEx SmartPost Settings Fields</td>
<td>105</td>
</tr>
<tr>
<td>Table 22</td>
<td>Handling Charges Fields</td>
<td>111</td>
</tr>
<tr>
<td>Table 23</td>
<td>FedEx SmartPost Default Doc-Tab Fields for Shipping Labels</td>
<td>115</td>
</tr>
<tr>
<td>Table 24</td>
<td>Advanced Settings Tab Fields</td>
<td>124</td>
</tr>
<tr>
<td>Table 25</td>
<td>FedEx Ground Tracking Number Prefixes</td>
<td>131</td>
</tr>
<tr>
<td>Table 26</td>
<td>FedEx Ground Tracking Number Options</td>
<td>132</td>
</tr>
<tr>
<td>Table 27</td>
<td>Transaction Download Example</td>
<td>142</td>
</tr>
</tbody>
</table>
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 people who will install and configure FSMS. You must have a basic understanding of how to set up network connectivity and administer Microsoft Windows.

Note: Some tasks in the guide require field level access privileges to the FSMS Configuration Utility. For Field Level access, type the password provided by your FedEx account executive.

Conventions

This guide uses the following conventions in the text.

- Sample transaction code is formatted in Courier New.
- Important notices begin with the word “Note.”
- In task instructions, software user interface elements, or information you need to enter in a field or transaction, are formatted 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

- FedEx Ship Manager®Server Developer Guide
- FedEx Ship Manager®Server Installation and Configuration Guide
- FedEx Ship Manager®Server Technical What’s New Guide
- FedEx Ship Manager®Server Transaction Coding Reference Guide

Support

- Contact support on the web at fedex.com.
- For 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.

FedEx Service Guide

Within this guide, you may be asked to refer to the FedEx Service Guide for details about FedEx services, packaging, and other information. To view or download the U.S. guide, go to fedex.com/us/service-guide and click the Download now option in the gray box on the left.

FedEx Electronic Export Information Filing Options (United States 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) go to http://www.fedex.com/us/electronic-export-information/filing.html for more information.
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, review System Requirements.

1.1 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 for minimum software and hardware requirements.
1.1.1 Minimum Software and Hardware Requirements

Table 1: FedEx Ship Manager Server Minimum Software and Hardware Requirements

<table>
<thead>
<tr>
<th>Minimum Software Requirements</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Operating System</td>
<td>Windows® 2003 SP2</td>
</tr>
<tr>
<td></td>
<td>Windows® XP SP3</td>
</tr>
<tr>
<td></td>
<td>Windows® 2008 Standard Server (32 bit)</td>
</tr>
<tr>
<td></td>
<td>Windows® 2008 Standard Server (64 bit)</td>
</tr>
<tr>
<td></td>
<td>Windows® 7 Professional (32 bit)</td>
</tr>
<tr>
<td></td>
<td>Windows® 7 Professional (64 bit)</td>
</tr>
<tr>
<td></td>
<td>Windows® Server 2012 Standard</td>
</tr>
<tr>
<td></td>
<td>Windows® Server 2012 R2 Standard</td>
</tr>
<tr>
<td></td>
<td>Windows® 2008 R2 Standard Server (64 bit)</td>
</tr>
<tr>
<td></td>
<td>Windows® 2008 R2 Server Enterprise (for Clustering)</td>
</tr>
<tr>
<td></td>
<td>Windows® 2003 R2 Server Enterprise (for Clustering) with iSCSI initiators</td>
</tr>
</tbody>
</table>

Note: This version of FedEx Ship Manager® Server is designed to work best on Windows 2003/2008R2 and higher. Microsoft ended support for Windows XP on April 8, 2014. FedEx recommends that you upgrade to ensure your systems are not at risk. See the Microsoft website: https://www.microsoft.com/en-us/windows/enterprise/end-of-support.aspx

<table>
<thead>
<tr>
<th>Minimum Hardware Requirements</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Processor</td>
<td>1.86 GHz or higher XEON Processor</td>
</tr>
<tr>
<td>Memory</td>
<td>2 GB RAM</td>
</tr>
<tr>
<td>Hard Drive</td>
<td>50 GB or larger</td>
</tr>
<tr>
<td>Network adapter</td>
<td>10/100/1000 Mbps</td>
</tr>
<tr>
<td>CD ROM drive</td>
<td>Windows-compatible</td>
</tr>
<tr>
<td>Modem</td>
<td>Hayes compatible 56k</td>
</tr>
<tr>
<td>Ambient Temperature</td>
<td>50 to 90 degrees Fahrenheit</td>
</tr>
</tbody>
</table>

1.1.2 Recommended Software and Hardware Requirements

Table 2 lists recommended software and hardware requirements.

Table 2: FedEx Ship Manager Server Recommended Software and Hardware

<table>
<thead>
<tr>
<th>Software Requirements</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Operating System</td>
<td>Windows® 2008 Standard Server (64 bit)</td>
</tr>
<tr>
<td></td>
<td>Windows® 7 Professional (32 bit)</td>
</tr>
<tr>
<td></td>
<td>Windows® 7 Professional (64 bit)</td>
</tr>
<tr>
<td></td>
<td>Windows® Server 2012 Standard</td>
</tr>
<tr>
<td></td>
<td>Windows® Server 2012 R2 Standard</td>
</tr>
<tr>
<td></td>
<td>Windows® 2008 R2 Standard Server (64 bit)</td>
</tr>
</tbody>
</table>
Software Requirements

Compatible Hypervisors that FedEx Ship Manager® Server supports (Virtualization lets you replicate multiple servers on a single machine, requiring less hardware):

- VMware ESX 3.5 and greater
- VMware VSphere 4 and greater
- Hyper-V

Hardware Requirements

<table>
<thead>
<tr>
<th>Requirement</th>
<th>Specification</th>
</tr>
</thead>
<tbody>
<tr>
<td>Processor</td>
<td>1.86 GHz or higher XEON processor</td>
</tr>
<tr>
<td>Memory</td>
<td>8 GB RAM</td>
</tr>
<tr>
<td>Hard Drive</td>
<td>80 GB or larger</td>
</tr>
<tr>
<td>Network adapter</td>
<td>100/1000 Mbps</td>
</tr>
<tr>
<td>CD ROM drive</td>
<td>Windows-compatible</td>
</tr>
<tr>
<td>Ambient Temperature</td>
<td>60 to 70 degrees Fahrenheit</td>
</tr>
</tbody>
</table>

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

1.1.3 Supported Servers

- HP Server Tower
  - HP Proliant ML 310 G5
  - HP Proliant ML 310 G6
  - HP Proliant ML 310e Gen8
- HP Server Rack
  - HP Proliant DL 360 G5
  - HP Proliant DL 360 G6
  - HP Proliant DL 320e Gen8
  - HP Proliant DL 360 G7
- Non HP Servers
  - Dell PowerEdge SC 440 (Tower)
  - Dell PowerEdge 1950 (Server Rack)

Note: FedEx does not support any other server models.

1.1.4 Supported Thermal Printers

- EPL printers
  - Zebra 2348 Plus
  - Zebra 2844
- ZPL printers
1.1.5 Supported Dot Matrix Printers

- Lexmark 2480
- Lexmark 2580
- Lexmark 2580 Plus

1.1.6 Supported Laser Printers

- HP LaserJet P 2015
- HP LaserJet P 2035
- HP LaserJet 1160
- HP LaserJet 1300
- HP LaserJet Pro 400 M401n

1.1.7 Supported Scales

- Serial/USB
  - Mettler Toledo PS60
  - Mettler Toledo PS90
  - Mettler Toledo BC 60

1.1.8 Network and Internet Connectivity Requirements

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

- Server running the software application must be configured for the TCP/IP protocol.
- 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.
1.2 Before You Begin Installation

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:

- About Your FedEx Account
- Creating a Windows Administrator Account
- Setting Windows Administrator User Rights
- System and Password Security

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.

1.2.1 Installation 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.
- Restart your computer when prompted and follow the instructions.

1.2.2 Pre-Installation Checklist

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

Table 3: Pre-Installation Checklist

<table>
<thead>
<tr>
<th>√</th>
<th>Action</th>
<th>Who</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>FedEx Account</td>
<td></td>
</tr>
<tr>
<td></td>
<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.GoFedEx 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></td>
<td>Windows Administrator Account</td>
<td></td>
</tr>
<tr>
<td></td>
<td>If your server is currently on a domain, remove it from the domain prior to the install process. After installation, you can add it back to the domain. While you can successfully install FSMS on a domain that is configured properly, it is best to remove it in order for the installation to go smoothly. This also eliminates other variables that could cause issues during the install.</td>
<td>Windows Admin</td>
</tr>
<tr>
<td></td>
<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></td>
<td>Verify that the computer you plan to use to run the FSMS application has a local</td>
<td>Windows Admin</td>
</tr>
</tbody>
</table>
## Installation of FedEx Ship Manager Server

### Action | Who
--- | ---
Windows Administrator account for installing and running the FSMS software. | Windows Admin
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. | Windows Admin

### FTP and Network Connections

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](http://microsoft.com).

### FedEx Compatible Installation and Solution Type

The FedEx® Compatible Program integrates FedEx shipping capability with many popular business software systems. The FedEx Compatible Solution Type code is a three-digit number that corresponds to the specific FedEx Compatible software you are using. This code is required to be entered during installation when FSMS is used with FedEx Compatible software. You must also accept an End User’s License Agreement (EULA). If you do not have a FedEx Compatible Solutions Type, contact your FedEx Compatible software provider to request the code.

**FedEx Compatible Providers:** Please contact the FedEx Compatible team at [compatible.help@fedex.com](mailto:compatible.help@fedex.com) to get the code for your solution type.

### 1.2.3 Post-Installation Checklist

Complete the post-installation checklist in [Table 4](#) after you install the FSMS software.

**Table 4: Post-Installation Checklist**

<table>
<thead>
<tr>
<th>Action</th>
<th>Who</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Meter Number Registration</strong>&lt;br&gt;If you do not choose to launch the Meter Registration Utility (MRU) 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><strong>FedEx Ship Manager Server Application Services</strong>&lt;br&gt;The FSMS application services start automatically. To verify that these server processes are starting, select Start &gt; Control Panel &gt; Administrative Tools &gt; Services.&lt;br&gt;&lt;br&gt;<em>Note: These steps are Operating System dependent.</em></td>
<td>FSMS Admin</td>
</tr>
</tbody>
</table>
### 1.2.4 About 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**.

### 1.2.5 Creating a Windows Administrator Account

You must create a local 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.

#### 1.2.5.1 To Create a Windows XP 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.

1.2.5.2 To Create a Windows 2003 Server Administrator Account

1. Log into your server using an account that has administrator privileges.
2. Create a new user account:
   o Click Start > Control Panel > Administrative Tools > Computer Management > Local Users and Groups.
   o 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.

1.2.5.3 To Create a Windows 2008 Server Administrator Account

1. Log into your server using an account that has administrator privileges.
2. Create a new user account:
   a. Click Start > Control Panel.
   b. Click on the Add or Remove user accounts under the User Accounts section.
   c. Click the Create a new account link.
   d. Specify an account name; for example FedEx Admin.
   e. Select the Administrator radio button.
   f. Click Create Account button.
3. Reboot your computer and logon using the account you just created. You must use this account to install and to configure FSMS.

1.2.6 Setting Windows Administrator User Rights

When you create the local 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.
2. You might have to switch to Classic View to see the Administrative Tools icon.
   
   Note: These steps are Operating System dependent.

3. In the left pane, expand Local Policies then click User Rights Assignment.
4. The User Rights policies appear in the right pane.
5. Double-click Log on as a service.
6. The service properties dialog box appears.
7. On the Local Security Setting tab, verify that your Administrator account is listed.
8. 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 go to microsoft.com.

### 1.2.7 System and Password Security

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. Note that if the password is changed and the server is rebooted, then the multiple attempts by the services to start will lock out the user account that is running the FedEx services.

### 1.3 How to Install FedEx Ship Manager Server

This section describes how to install the FSMS.

Note: To avoid installation errors caused by insufficient account permissions, remove the server from the domain prior to installing the FSMS software.

#### 1.3.1 Installing FedEx Ship Manager Server

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

Pre-Installation Checklist.

1. 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.
2. The FSMS setup prepares the InstallShield Wizard for the FSMS software installation.
3. If necessary, the Setup program installs the Microsoft Visual C++ Redistributable software. This step requires no intervention.
4. The Welcome message appears. Click Next to continue.

Figure 1. Installshield Screen
5. Enter the product key and press next.
   For the Product Key, refer to the most recent version of the FedEx Ship Manager® Server Release Notes.
Figure 3. Enter the Product Key

Note: The product key is valid for three years from general release date of FedEx Ship Manager Server 14.0.0. 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.”
6. Select the Installation Type: **Proprietary - Hardware**, **Proprietary - Software Only**, or **FedEx Compatible Provider**.
Figure 5. Choose Installation Type

7. Select the directory location where you want to install FSMS.
   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 6. Choose Destination Folder

![Destination Folder Dialog Box]

- Install FedEx Ship Manager Server v 14.00 to: C:\FedEx\'
- Click Next to install to this folder, or click Change to install to a different folder.
- Options: Back, Next, Cancel.
8. Before installing the FSMS files 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.

*Note: If someone else logs in with a different password then the FedEx services will not start after the installation is complete.*

Click **Next** to continue.
Figure 8. Password Screen

Specify the user name and password of the user account that will logon to use this application. The user account must be in the form DOMAIN\Username.

User name: WIN-GMLPF3LOT3J\Administrator

Password: ********

Select the button below to specify information about a new user that will be created during the installation.
9. The wizard displays the **Start Copying Files** window.

   After a few moments, the network connection dialog appears.

   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.

10. The wizard displays the **Setup Status** window and shows the status of the FSMS installation.
11. The network options screen lets you specify how the setup program should communicate with FedEx.
   a. 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.
   b. Choose **Network** to connect through your site’s existing network (preferred option).
   c. Choose **Private** to connect through an existing VPN connection to FedEx.
12. 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.

a. Select Connect through a Proxy Server if you are connecting to FedEx through a proxy server.

b. Be sure to click the Set Proxy Password button at the bottom of the window to specify the proxy user and password.

c. Specify whether you want to establish the connection manually or automatically by using a proxy configuration script.

13. To set up an automatic connection, select Set Automatic Proxy Configuration Location (URL) for Tunnel Client and specify the automatic configuration script URL.
14. To set up a manual connection, select **Set Manual Proxy Settings for Tunnel Client** and specify the address (iPort number) for the Tunnel Server.

15. 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.

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

   ![Figure 12. Configure Direct Access](image)

---

*FedEx Ship Manager Server Installation and Configuration Guide*
17. The Meter Registration Utility opens and displays the information for your account. If you selected I would like to launch the Meter Registration Utility as part of the installation process in step 9, provide the following information:
   o FedEx Account Number
   o Country
   o Postal Code
   o Meter Number

   **Figure 13. Meter Registration Utility**

If you have additional meters you would like to add, then enable the checkbox labeled This meter has also been assigned Child meters and enter the information, as shown.
18. Click **Next** to proceed.

19. Click **Finish** to exit the installation process.
20. Click **Yes** to restart your system so that the configuration changes you made take effect.

21. After the reboot, if you enabled the Meter Registration Utility checkbox, then the Meter Registration Utility opens and displays an activity window that tracks the downloads received from FedEx as part of the meter registration process.

   *Note: The activity window is dynamic. Markers indicate the 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 17. Meter Registration Activity Window Showing Master Meter Component Status
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.

### 1.3.2 Creating a New FedEx Meter Number

A Meter Number is tied to your shipping location and your account number. You must have a FedEx Express account number and a master meter before you can begin using FSMS. You can start the Meter Registration Utility (MRU) as part of the FSMS installation process if you have an existing meter(s) or you can run it manually at any time to acquire additional meters. When 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.

1. To register a new FedEx meter:
   a. Start the FedEx Meter Registration Utility by double-clicking the Meter Registration icon in the FedEx Ship Manager folder on your desktop.

   ![Meter Registration Icon](image.png)

   b. In the Meter Registration Utility window, enter the detailed information about your shipper location, then click Next.
c. When a new meter number is successfully created, the new number displays an activity window, as shown, that tracks the downloads received from FedEx as part of the meter registration progress.
d. When finished, click Finish and the FSMS Configuration Utility will be automatically populated with the downloaded information.
1.3.3 Adding an Existing FedEx Meter Number from the FSMS Configuration Utility

To add an existing FedEx meter number after the initial install:

1. Start the FedEx Configuration Utility by double-clicking the FSMS Configuration Utility icon in the FedEx Ship Manager folder on your desktop.
2. Select Access Privileges.
3. Enter your password.
4. Select Add New.
5. Enter in the Meter Number, Account Number, Country and Postal Code.
6. Click OK.
7. Click Apply & Exit.

1.3.3.1 Downloading Components

After adding a FedEx meter number from the FSMS Configuration Utility, you can download components.

1. Open the FedEx Demand Download Utility by double-clicking the FSMS Demand Download Utility icon in the FedEx Ship Manager folder on your desktop.
2. Select the meter number in the Meter / Account field.
3. Select the components you want to download and click Start.
4. After all the selected components have been downloaded, click Exit.

1.3.4 Installing FedEx Ship Manager Server in a Microsoft Based Failover/Availability Cluster

Prevent interruptions and improve your reliability.

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

1.3.4.1 Install FSMS on Primary Node

1. Take secondary nodes offline via Cluster Administrator. Right click on the secondary node, then select Stop Cluster Service.
2. Install FSMS on primary node on clustered shared drive.

1.3.4.2 Install FSMS on Any Additional Node(s)

1. Bring secondary node online via Cluster Administrator.
2. Take primary node offline via Cluster Administrator.
3. Right click the primary node then select Stop Cluster Service.
4. Install FSMS on additional node(s) on clustered shared drive.
5. Configure the FSMS Cluster as detailed below, now or after the complete cluster is set up, that is, all nodes have been added.
1.3.4.3 Configuring Cluster Groups

1. Add all services and configure as resource dependencies in the Cluster Administrator for the services listed below.

Right click Cluster Group, select New, then select Resource (see Cluster Administrator View - Addition of Services).

Note: At a minimum FSMS must be configured and installed on your primary node.
Figure 22. Cluster Administrator View - Addition of Services

a. From the Services control panel, right click on each service and select Properties (see Services Control Panel, Properties Choice).

- FedEx Admin
- FedEx Broadcast Service
- FedEx CLS Service
- FedEx ConfigManager Service
- FedEx Open Ship
- FedEx Print Service
- FedEx Query Service
- FedEx Rating
- FedEx Routing
- FedEx Ship Manager
- FedEx SQL Anywhere - FXRS_DB
- FedEx Tracking
- FedEx Web Services Client
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 FedEx Routing Properties window.

**Figure 23. Services Control Panel, Properties Choice**

c. Click Next.

d. The node names will automatically be populated within the Possible owners list.

e. If not, add them from the Available nodes list and click Next.
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 FedEx Routing Properties panel.
   e. Add each service as a dependency and click Next.
b. On the **Generic Service Parameters** window, name the service exactly as it appears on the **General** tab of the **FedEx Routing Properties** window and click **Next**.
3. Set the registry replication:
   - Software\Federal Express
   - Software\FedEx
   - Software\FedEx Services
   - Software\FESC
   - Software\FXRS_Install
     a. Select each Registry Key, as shown in Registry Key and click Add.
     b. Click Apply when finished.
4. Bring services online, if offline.
   Right click **Cluster Group** and select **Bring online** (see **Bring Services Online**).

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

6. 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 or support customers’ virtual or clustered environments.

1.4 Uninstalling the 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.

1.4.1 Windows XP/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 **Yes, I want to restart my computer now.**
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.
- Hold the mouse cursor over a field to display 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 Exit or the Close button (\(\times\)) to close the FSMS Configuration Utility, the data you entered will not be saved. Be sure to click Apply or Apply & Exit to save your entries.

2.1 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: Privileges assigned to allow a user to view, but not edit, field level settings.
- Field Level: Password protected privileges accessible by FedEx account executives and customer integration consultants (CICs).

Table 5 shows how privileges are assigned for each configuration category managed by the FSMS Configuration Utility.
2.2 Before You Begin Configuration

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.
Configuration of FedEx Ship Manager Server

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 intra-U.S. 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.

2.3 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. 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.

FedEx Ship Manager Server can handle more than one account number, but each meter is assigned to a single account number. Each FedEx Ship Manager Server 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. The child meters may have the same or different Express and Ground account numbers as the master meter.

*Note: Meter numbers should only be on one server at a time. If the same meter is on multiple FSMS servers then a rating, routing, or tracking number outage can occur.*

2.3.1 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.

Note: FedEx recommends, for the best system performance and backup/maintenance, using no more than 50 meters on a server if possible, depending on the hardware specifications and operating system.

2.3.2 Getting 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 with the same Express account number, 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 will be child meters.

2.3.2.1 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.

3. The meter you acquire will be a child meter of the specified Master Meter.

Note: If you are not enabled for ground shipping, you will receive Error Message 5061, "Your FedEx account is not FedEx Ground enabled. Please call FedEx Customer Support via your normal support channel to request FedEx Ground enablement."

4. Specify the contact and location information that you want to associate with the child meter, and then click Next.
5. 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.

2.4 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 set for User Level access:
- 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

When using the FedEx Configuration Utility, if a text field appears in red, it contains an invalid field value. Correct the field before exiting the window. Hold the mouse cursor over a field to display 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 & Exit to save your entries before you close the Configuration Utility.
2.4.1 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.

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.
   - Enter your password.
     - 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.
     - 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.
     - For Field Level access, type the password provided by your FedEx account executive.
4. Click OK to continue.
   - Note: The following figure 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.
Shipper Settings Tab - Field Level View with User Level Access shows Field, Support, and Developer Level access to the FSMS Configuration Utility.

Note: The IPD / IED / IDF Settings tab does not display if the shipper has not contracted for those optional services.
2.5 Configuring Shipper Settings

Configure shipper settings, as shown in the Shipper Settings Tab, 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.

1. To configure Shipper Settings, click the Shipper Settings tab.
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 & Exit** to save your selections. **Table 6** describes Shipper Settings.

**Table 6: 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>
</tbody>
</table>
### Setting | Description
---|---
Account Number | The customer’s FedEx account number.
Master Meter | 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. If a meter number is not specified in a transaction, the server defaults to the master meter.
Do Not Allow Multiple Meters per Account Number | 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.
Contact Name* | Enter the contact name. This can be a company name.
Company Name* | Enter the company name.
Department* | 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.
Address Line 1* | Enter the primary address for your location, typically the street name and number.
Address Line 2* | Enter any secondary address information, such as Suite #, on Address Line 2.
City* | Enter the city name from which shipping will originate.
Country* | FedEx Ship Manager Server 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
## Setting

<table>
<thead>
<tr>
<th>Setting</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>validated and any routing information supplied on your package label is determined from the FedEx location designated for your country.</strong></td>
<td></td>
</tr>
<tr>
<td><strong>State/Province</strong> *</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><strong>Postal Code</strong> *</td>
<td>Enter the postal code for your shipping origin location.</td>
</tr>
<tr>
<td><strong>Cleaned Postal</strong></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><strong>Phone Number</strong> *</td>
<td>Enter your company phone number. No special characters, such as dashes, are allowed.</td>
</tr>
<tr>
<td><strong>Origin Loc ID</strong></td>
<td>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><strong>Meter Time Zone</strong></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.  
  * The Force Close Time is entered in military time (for example, 1:00) |
### Setting | Description
--- | ---
 | 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.

**Email Address**
Enter the email address for the shipping contact in your company.

**Pager Number**
Enter the pager number for the shipping contact in your company.

### 2.5.1 Close Options

A new button called 'Close Options' is added to the Shipper Settings Tab to allow you to configure the Auto Close time for Express, Ground, SmartPost and Freight shipments. The access privileges for the new button will be at "User View" Level. When clicked, a pop up window will appear that could contain any combination of Express, Ground, SmartPost or Freight based on the origin country of the meter.
2.5.1.1 Close Option Dialog

The following new Close Option Dialog box appears on clicking the “Close Options” button. The Meter drop down list contains all meters installed on the box. If the meter selected is the actual Master meter, the word “Master” displays in red.

- The OpCo's that are visible are based on the origin country of that meter. This is the existing general behavior within the configuration utility.
- The Auto Close time field and checkbox continue to function as they do on the Meter tab for Express and Ground. The access privileges are at the “User View” Level.
- The “OK” and “Cancel” buttons function as they do currently on existing tabs.

Note: The “Copy to All Meters” functionality is not applicable.
Table 7: LTL Freight and Smartpost will have the following access privileges

<table>
<thead>
<tr>
<th>Level</th>
<th>Read Only Access</th>
<th>Write</th>
</tr>
</thead>
<tbody>
<tr>
<td>User Level</td>
<td>×</td>
<td>×</td>
</tr>
<tr>
<td>User View Level</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Field Level</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Support Level</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Development Level</td>
<td>✓</td>
<td>✓</td>
</tr>
</tbody>
</table>

2.5.1.2 Auto Close Time Box

The following close related configurable option is removed from the Express, Ground and LTL Freight Options combo boxes on the Meter Settings tab and relocated to the Shipper Settings tab.

Note: There are no checkboxes following the Express and Ground Auto Close Time Box.
The following close related configurable option is removed from the SmartPost Options combo box on the SmartPost Settings tab and relocated to the Shipper Settings tab:

2.6 Configuring Report Settings

Open the Report Settings tab, as shown in Configuring Report Settings, 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.

1. To configure Report Settings, click the Report Settings tab.
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

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. This table shows samples of available reports.
### Table 8: Report List

<table>
<thead>
<tr>
<th>Reports</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>U.S. origin, FedEx Express®, and FedEx Freight®. The Freight folder has the Bill of Lading report for FedEx Freight service. The Shipment Summary report provides a summary of all shipping.</td>
</tr>
<tr>
<td></td>
<td>U.S. origin, FedEx Express and FedEx Ground®</td>
</tr>
<tr>
<td></td>
<td>U.S. origin, FedEx SmartPost® enabled</td>
</tr>
<tr>
<td></td>
<td>- FedEx SmartPost Detail Manifest, and Returns reports will be enabled when SmartPost is enabled on the SmartPost Settings tab on the FSMS Configuration Utility.</td>
</tr>
<tr>
<td></td>
<td>- FedEx SmartPost Manifest report shows SmartPost shipments in which FedEx Ground only is the pickup carrier, and it only includes the SmartPost Delivery Confirmation Numbers. See the FedEx Ship Manager® Server Developer Guide for details on SmartPost reports.</td>
</tr>
<tr>
<td></td>
<td>U.S. origin, all services enabled</td>
</tr>
<tr>
<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 &amp; Exit button, and then re-launch the FSMS Configuration Utility to configure FedEx Ground reports.</td>
</tr>
<tr>
<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>
</tbody>
</table>
### Reports

<table>
<thead>
<tr>
<th>Reports</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>CA origin, MX origin, FedEx Express only</td>
<td><strong>Reports</strong>&lt;br&gt;া. Domestic&lt;br&gt;ি. International&lt;br&gt;০. DG&lt;br&gt;৭. Freight&lt;br&gt;odus. Shipment Summary</td>
</tr>
<tr>
<td>CA origin, FedEx Express and FedEx Ground</td>
<td><strong>Reports</strong>&lt;br&gt;া. Domestic&lt;br&gt;ি. International&lt;br&gt;০. Ground&lt;br&gt;০. DG&lt;br&gt;৭. Freight&lt;br&gt;odus. Shipment Summary</td>
</tr>
<tr>
<td>CA origin, all services enabled</td>
<td><strong>Reports</strong>&lt;br&gt;া. Domestic&lt;br&gt;ি. International&lt;br&gt;ব. IPD Distribution [IPD/ED]&lt;br&gt;ব. IDF&lt;br&gt;ব. Ground&lt;br&gt;ব. DG&lt;br&gt;৭. Freight&lt;br&gt;odus. Shipment Summary</td>
</tr>
<tr>
<td>Non-U.S. or CA origin, FedEx Express only</td>
<td><strong>Reports</strong>&lt;br&gt;ি. International&lt;br&gt;০. DG&lt;br&gt;odus. Shipment Summary</td>
</tr>
<tr>
<td>Non-U.S. or CA origin, all services enabled</td>
<td><strong>Reports</strong>&lt;br&gt;া. Domestic&lt;br&gt;ি. International&lt;br&gt;ব. IPD Distribution [IPD/ED]&lt;br&gt;ব. IDF&lt;br&gt;ব. Ground&lt;br&gt;ব. DG&lt;br&gt;৭. Freight&lt;br&gt;odus. Shipment Summary</td>
</tr>
</tbody>
</table>

- 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 & Exit** button and then re-launch the FSMS Configuration Utility to configure FedEx Ground reports.
- 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.
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.
   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.
   d. To print close by reference reports for domestic and international FedEx Ground and FedEx Express shipments, check the either the **Reference Confirmation** or the **End of Day Close** checkbox under **Report Print Options**. These options will indicate if the report is to print when processing an **017/117 Reference Confirmation Request**, an **007/107 End-of-Day Request**, or both.

6. For International Commercial Invoice, Pro forma 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.
   a. See [Selecting Default Report Images](#).

8. Click **Apply** or **Apply & Exit** to save your selections.
**Figure 36. Selecting Default Report Images**

Note: If the **No Shiptime Rates** checkbox is selected on the Meter Settings tab, the following reports print without rates:

- Domestic Courier Report Close
- Domestic EOD TransOut Report
- Domestic Invoice Report
- Domestic Shipments Report
- Freight Bill of Lading
- Ground C.O.D. Report
- Ground Domestic EOD
- Ground Hazardous Material Certification Report
2.6.1 Configuring Laser and Thermal Label 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 Label Defaults groupbox, shown in Laser and Thermal Label Default Settings Groupbox and Additional Laser and Thermal Copies Groupbox to configure these settings. The whole Label Settings tab is not shown.

1. To designate printers to print laser and/or thermal air waybills, click the Label Settings tab.
2. Under Laser and Thermal Label 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:
   o 0 Tracking number
6. To designate additional laser and thermal label copies, click the **Label Settings** tab and perform the following steps.

   a. Under **International**, enter the number of labels to print for FedEx International services. You may print up to three (3) copies per category.
      - In **Shipper**, enter the number of additional labels to print for the person or company sending the shipment.
      - In **Customs**, enter the number of additional labels to print to fulfill international customs regulations.
      - In **Manifest**, enter the number of additional labels to print with manifest documents.

   ![Additional Laser and Thermal Copies Groupbox](image)

   b. Under **LTL Freight**, enter the number of labels to print as shown in **Set Number of Freight Label Copies**. You may print up to nine (9) copies per shipment. Enter zero (0) to not print copies.

   ![Set Number of Freight Label Copies](image)

   **Note:** The IPD/IDF/IED items appear only if one of the optional services is enabled on the IPD / IDF / IED 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.

7. To select an air waybill multi-ply pin-feed printer, click the **Label Settings** tab and perform the following steps.
a. Under Multi-Ply Printer Defaults, click the Printer icon to select the pin-feed printer for multi-ply forms.

Figure 40. Multi-Ply Printer Defaults

<table>
<thead>
<tr>
<th>Multi-ply Printer Defaults</th>
</tr>
</thead>
<tbody>
<tr>
<td>Air Waybill Printer ID</td>
</tr>
<tr>
<td>Form Type</td>
</tr>
</tbody>
</table>

b. In the Printer Selection screen, select the printer type.

c. 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. This table describes the form types.

Table 9: Multi-Ply Air Waybill 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>

8. 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.

9. To apply and save your label configurations, click Apply or Apply & Exit to save changes to printer selections and other settings on the Label Settings tab.

2.7 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.

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.
3. Configure system settings as described in the following tables, and then click **Apply** or **Apply & Exit** to save your selections.

Table 10 describes general fields on the **Systems Settings** tab.

Table 11 describes **Database Backup** fields on the **Systems Settings** tab.

Table 12 describes **Ship History** fields on the **Systems Settings** tab.

### Table 10: 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, tracking numbers, etc.). The Reconcile Time defaults to 0300. Recommendation: Configure the reconcile time to a time when no server activity</td>
</tr>
</tbody>
</table>
**Setting Name** | **Description**
--- | ---
Enable Password Configuration | Select this checkbox to enable the Enter Password and Confirm Password fields. Enter the same password in both fields.
CTS Port Number | The port used to send standard FedEx transactions to FedEx Ship Manager® Server (FSMS).
Web Services Port Number | The port used to send Web Services transactions to FSMS.
Origin Phone Number | Your system modem number.
Transaction Log | Enable this checkbox to have the system keep a log file all transactions processed by FSMS. When enabling the transaction logger, shipping must be stopped and the FedEx ShipManager service must be stopped and restarted.
Use Dynamic Surcharging | Check this box to use the Dynamic Surcharging feature, which is described in detail in the *FedEx Ship Manager® Server Developer Guide*. When switching between standard and dynamic surcharging, the FedEx OpenShip service must be stopped and then restarted for the change to take effect.
Extend 90 Day limit - Ground | 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 intra-country and international shipping only. When this box is not selected, the standard 90-day limit is used for Future Day shipping.
Receive Rates | 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.

**Table 11: 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 (.folder) to browse and select a directory.</td>
</tr>
<tr>
<td>2nd Backup Directory</td>
<td>Type a directory path or click the Folder icon (folder) to browse and select a directory.</td>
</tr>
</tbody>
</table>
Table 12: 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. 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®. Specify the time in the 24-hour (hhmm) format (for example, 1300 is 1 p.m.).</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>LTL Freight</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>

2.8 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 Developer Guide for details.) The Meter Settings tab requires Field Level access privileges.

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, as shown in the figure.

Figure shows settings for a meter that is set up for U.S.-origin shipping.
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 & Exit** to save your selections.

Table 13 describes the fields on the Meter Settings tab for setting up FedEx Express service.

Table 14 describes the fields on the Meter Settings tab for setting up FedEx Ground service.

Table 15 describes the fields on the Meter Settings tab for setting up FedEx Freight service.

Table 16 describes the fields on the Meter Settings tab for setting up FedEx Electronic Trade Documents service.

Table 17 describes fields for general options.

*Note: See About FedEx SmartPost Configuration and the FedEx Ship Manager® Server Developer Guide for instructions on how to configure the settings for the optional FedEx SmartPost service.*
### Table 13: FedEx Express Options

<table>
<thead>
<tr>
<th>Settings</th>
<th>Description</th>
</tr>
</thead>
</table>
| **Rating Options**             | For the meter(s) on your server (U.S. origins only), there are five rating options:  
  - None - No rates are returned  
  - Discount - Only discount rates are returned  
  - List & Discount - Both discount and list rates are returned  
  - Discount/List/Alternate  
  - Discount & Alternate  
  **Default:** Discount |
| **Rate Reply Content Options** | Discount Options include:  
  - Exclude Earned Discounts  
  - Exclude Bonus Discounts  
  - Use Discount Options with the Standard Rate Reply tags.  
  - Use Discount Options with the Alternate Rate Reply tags.  
  See [Rate Reply Content Options](#) and in the **Discount Options** area, check one or more type of discounts that you would like to include. You must also check one or more of the bottom checkboxes to indicate on which fields you would like to exclude the discounts that were selected in the **Discount Options** area.  
  **Note:** If you do not check at least one checkbox from the top two choices and one from the bottom two choices, then discounts will not be excluded. |
| **Third Party Consignee**      | When this option is selected, the Commercial Invoice for international shipments is not to be attached to the shipment. |
| **Late Drop Off Time**         | 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. |
| **Canada Label Customs Value Suppression** | This option, if selected, prevents the customs value for a FedEx CA-origin shipment from printing on the shipping label. |
Note: For CA-origin shipments, this field appears as Label Customs Value Suppression to U.S.

### ExpExtFutureAllowed
Enable this checkbox to allow Future Day service in 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 Customer Integration Consultant (CIC) or FedEx Compatible provider for more information.

### IATA DG Validation
When selected, displays the IATA DG Validation Dialog pop-up window. The Meter drop-down menu default is the selected or default meter number set in the Configuration Utility.

There are three shipping options:
- **Intra Country - (Intra-XX):** This checkbox is only visible where intra-country shipping is allowed and IATA Dangerous Goods is supported. For a U.S. Origin meter, this is checked by default. All other non-U.S. Origin meters are unchecked by default.
- **Export:** This checkbox is only visible if IATA Dangerous Goods is supported. For a U.S. Origin meter, this is checked by default. All other non-U.S. Origin meters are unchecked by default.
- **Transborder Distribution:** This checkbox is only visible for Canada TD shipments.

Regarding these checkboxes, unchecked is OFF which equals Optional/Legacy IATA Dangerous Goods Validation, and checked is ON which equals Full IATA Dangerous Goods Validation. The Apply button saves the selected option for the meter in the database. The Copy to Same Origin Meters button applies the meter settings to all the same origin meters.
## Configuration of FedEx Ship Manager Server

### FedEx Ship Manager

**Server Installation and Configuration Guide**

<table>
<thead>
<tr>
<th>Settings</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Exit button</td>
<td>Closes the window without saving the settings and returns you to the Meter Settings Tab.</td>
</tr>
<tr>
<td>Auto Close Time</td>
<td>Define the time daily shipments should automatically close. This field defaults to <strong>0000</strong>, which means Auto Close Time will not start. Enter a valid time for the auto close to occur daily. The close function for the specified carrier will start with the <strong>007 End-of-Day Close Request</strong> for the meter specified.</td>
</tr>
</tbody>
</table>

![Rate Reply Content Options](image)

**Figure 43. Rate Reply Content Options**

**Table 14: 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&lt;sup&gt;®&lt;/sup&gt; and FedEx Home Delivery&lt;sup&gt;®&lt;/sup&gt; 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. If you are not ground enabled and attempt to register a U.S. or Canada child meter, you will receive Error Message 5061, “Your FedEx account is not FedEx Ground enabled. Please call FedEx Customer Support via your normal support channel to request FedEx Ground enablement.”</td>
</tr>
<tr>
<td>Rating Options</td>
<td>For the meter(s) on your server (U.S. origins only), there are five rating options:</td>
</tr>
<tr>
<td>Settings</td>
<td>Description</td>
</tr>
<tr>
<td>---------------------------------</td>
<td>-----------------------------------------------------------------------------</td>
</tr>
<tr>
<td><strong>Settings</strong></td>
<td><strong>Description</strong></td>
</tr>
<tr>
<td>None - No rates are returned</td>
<td>None - No rates are returned</td>
</tr>
<tr>
<td>Discount - Only discount rates are returned</td>
<td>Discount - Only discount rates are returned</td>
</tr>
<tr>
<td>List &amp; Discount - Both discount and list rates are returned</td>
<td>List &amp; Discount - Both discount and list rates are returned</td>
</tr>
<tr>
<td>Discount/List/Alternate</td>
<td>Discount/List/Alternate</td>
</tr>
<tr>
<td>Discount &amp; Alternate</td>
<td>Discount &amp; Alternate</td>
</tr>
<tr>
<td><strong>Default:</strong> Discount</td>
<td>Discount</td>
</tr>
</tbody>
</table>

**Rate Reply Content Options**

Discount Options include:
- Exclude Earned Discounts
- Exclude Bonus Discounts
- Use Discount Options with the Standard Rate Reply tags.
- Use Discount Options with the Alternate Rate Reply tags.

**HazMat**

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. This flag should automatically be set when you demand download Express domestic rates using the Demand Download Utility, if your account has already been enabled.

**ECOD**

If you have contracted to ship FedEx Ground 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.

**Label Multipack Piece Count**

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*.

**Custom Transit Data Key**

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
<table>
<thead>
<tr>
<th>Settings</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<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>
<tr>
<td>IGD Enabled</td>
<td>Enable this checkbox to enable FedEx International Ground® Distribution shipments.</td>
</tr>
<tr>
<td>Note: If IGDD is enabled for a specific meter, services other than IGDD such as Express, may not be used on that meter.</td>
<td></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>
<tr>
<td>Alcohol Shipper</td>
<td>Enable this checkbox to allow FedEx Ground alcohol shipments within the 50 U.S. states, excluding Puerto Rico and the U.S. territories. You must have either Field, Support, or Development Access. After this checkbox is enabled, when Field 1332 (Alcohol Flag) is set to Y for intra-U.S. shipping, Field 2399 (Signature Required Type) defaults to 4 (Adult) signature requirement.</td>
</tr>
<tr>
<td>Auto Close Time</td>
<td>Define the time daily shipments should automatically close. This field defaults to 0000, which means Auto Close Time will not start. If a time is entered, then the close function for the specified carrier will start with the 007 End-of-Day Close Request for the meter specified.</td>
</tr>
</tbody>
</table>

**Table 15: FedEx Freight Options**

<table>
<thead>
<tr>
<th>Settings</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Rating</td>
<td>For the meter(s) on your server (U.S. origins only), there are two rating options:</td>
</tr>
</tbody>
</table>
### Configuration of FedEx Ship Manager Server

#### Table 16: FedEx Electronic Trade Documents Options

<table>
<thead>
<tr>
<th>Settings</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>ETD Allowed</td>
<td>Enable this checkbox to activate functionality for FedEx® Electronic Trade Documents. 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 17: 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>
<tr>
<td>Global Returns Allowed</td>
<td>This checkbox lets you configure Global Return shipments. Before creating your first global return shipment, or a non intra-U.S. return shipment, you must acknowledge receipt of the Terms and Conditions. If you do not acknowledge the Terms and Conditions, then you will be prevented from creating the return shipment. When you select this checkbox, the Global Returns - Terms and Conditions Language Selection pop-up window appears. Select the language preference and select OK, which checks the Global Returns Allowed checkbox and returns you to the Meter Settings tab.</td>
</tr>
<tr>
<td>Alcohol Shipper</td>
<td>The Alcohol Shipper checkbox is added on the Meter Settings tab. This checkbox is downloaded from the</td>
</tr>
</tbody>
</table>
Settings | Description
---|---
FedEx central system based on the customer eligibility to ship alcohol. Alcohol shipping functionality is available for the meter only when this checkbox is enabled. When an intra-U.S. shipment is identified as containing alcohol using Field 1332 (Alcohol Flag), the shipment will be defaulted with adult signature service; i.e. Field 2339 (Signature Required Type) will be set to 4 (Adult), and a signature service surcharge is added to the shipment. **Note:** The Customer reference field will also have ‘$AW’ text added in the beginning.

2.8.1 Configuring FedEx Electronic Trade Documents

The **ETD Allowed** checkbox, shown in [Meter Settings Tab](#), is found on the **Meter Settings** tab. The checkbox is visible under Field and Support Privilege Levels for sender countries allowed to use FedEx® Electronic Trade Documents (ETD). 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 [FedEx Electronic Trade Documents Terms and Conditions Screen](#).

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.
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.

   Note: Many countries require the letterhead and signature for electronic documents, so it is important to upload them prior to processing shipments.
Figure 45. Digital Letterhead Logo and Digital Signature Message

Note: The maximum letterhead image cannot exceed 7.75\" x 3\" for letter-size paper with a 3\" offset. The maximum signature image dimensions cannot exceed 2\" x 1\".

5. The Meter Settings tab reappears with the ETD Default Options, as shown in Meter Settings Tab.

6. The Electronic Trade Documents feature automatically defaults to Use ETD, as shown in Meter Settings Tab, 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. 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).

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

   o 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 ETD transactions while you wait for the confirmation.

   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.

   a. 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.

a. To confirm your document upload, 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 to optimize shipping speed within the 020 Global Ship Transaction.

Note: Customers can upload the Commercial Invoice, Certificate of Origin, Pro forma 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. Adjust the size of the document before uploading the document, and you can upload up to five documents at a time.

9. As a best practice, provide Commodity Level Detail.
   a. When processing an Open Ship transaction for multiple-piece shipments (MPS) using Electronic Trade Documents, 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 for detailed information.

10. Select Apply & Exit.

2.8.1.1 Methods for Uploading Electronic Trade Documents Shipping Document

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.
   a. Ensure that you clearly specify what customs documentation you are uploading, such as a Commercial Invoice. Failure to do so will result in no upload and can potentially lead to delayed shipments.
   b. Upload Customer and FedEx Generated shipping documents and ship at the same time via the 020/120 Global Ship Transaction.

2.8.2 Configuring Global Returns

Before creating your first international print return shipment, or a non-U.S. intra-country return shipment, you must acknowledge receipt of the Terms and Conditions. If you do not first acknowledge the Terms and Conditions, you will be prevented from creating the return shipment.

1. Select the Global Returns Allowed checkbox located on the Meter Settings tab.
This checkbox is available to user view, field, support and development access privilege levels. The default is unchecked, which means that global returns is not available or is off. This must be checked for a global returns shipment or a non-US intra-country returns shipment to be created by the meter. This includes creating a meter manually, or by using the Meter Registration Utility (MRU) or the Auto Configuration Utility (ACU). This value will not be copied from the master meter to any other new meters. The **Global Returns - Terms and Conditions** pop-up window appears, as shown.
Figure 47. FedEx Global Returns - Terms and Conditions Language Selection Screen

Note: The Terms and Conditions are not displayed at this time.

2. Select the language preference, either **English**, as shown in this figure, or **French**.
3. Select **Print** to print the Terms and Conditions.

4. Select I accept the terms and conditions and select OK, which then automatically checks the Global Returns Allowed checkbox and returns you to the Meter Settings tab. If you select Cancel, then the Global Returns - Terms and Conditions Language Selection pop-up window disappears, the system un-checks the I accept the terms and conditions if checked, the IR Allowed checkbox also remains unchecked, and you are returned to the Meter Settings tab. The value of the checkbox, the last date in which the value was changed, and the meter number is saved to a file for legal purposes.

### 2.8.3 Editing Software ID Data Capture

1. Click the **Software ID Data Capture** button of the Meter Settings tab to display the **Software ID Data Capture** dialog box shown in **Software ID Data Capture Dialog Box**, which displays further identification information about FedEx Compatible client software that is associated with your FSMS installation.

2. Before editing Software ID information, be sure that you have reviewed the FedEx Compatible Installation and Solution Type information listed in **Table 4**.
3. Software ID Data Capture Fields describes fields used to capture Software ID information.

Figure 49. Software ID Data Capture Dialog Box

Table 18: Software ID Data Capture Fields

<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 FedEx Compatible 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, the middleware identification in entered 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>

2.8.4 Configuring Handling Charges

If your shipping operation charges handling fees in additional 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.

1. To open the Handling Charges Dialog, click the Meter Settings tab.
2. Click Handling Charges.
3. The **Handling Charges Dialog** screen appears, as shown in Handling Charges Dialog.

4. 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 and the FedEx Ship Manager® Server Developer Guide for details on setting handling charges for FedEx SmartPost.

![Handling Charges Dialog](image)

2.8.4.1 Handling Charge Calculation

The settings required to designate a handling charge calculation are defined in Meter Settings for Handling Charge Calculations.
### Table 19: Meter Settings for Handling Charge Calculations

<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>
<tr>
<td>Percent of Net Charge - Taxes</td>
<td>This feature is available for Canadian customers shipping intra-Canada packages only. If you choose this option, you may include Canadian taxes as part of the net charge used to calculate a handling charge. For example, your shipment price is $100CAD and Canadian taxes are $5CAD. If you configure 5.00 (%) for your handling fee, the actual handling fee assessed on the shipment is $5.25CAD.</td>
</tr>
</tbody>
</table>

#### 2.8.4.2 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.

### 2.8.4.3 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.

### 2.8.4.4 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.

### 2.8.4.5 No Upload No Ship

If this option, shown in **New Rating Options on the Meter Settings Tab** is selected, FedEx Ship Manager Server does not allow shipping to continue if revenue files have not been uploaded for 72 hours.

### 2.8.4.6 No Shiptime Rates

The **No Shiptime Rates** checkbox on the Meter Settings tab provides the ability to turn off rating when shipping. This allows customers to improve their performance when rating at the time of shipping is not required. See **New Rating Options on the Meter Settings Tab**.

The default position of the **No Shiptime Rates** checkbox is unchecked (turned off). If a customer upgrades to FSMS 13.0.0, the **No Shiptime Rates** checkbox is unchecked and the **Rating Options** drop-down menu options are set to **List and Discount**.
When No Shiptime Rates is enabled, no rate reply fields are returned in the 120 Global Ship Reply and no rates will be stored in the database.

User View, Field, Support, and Development access privileges can turn on or off the No Shiptime Rates button on the Meter Settings tab.

### 2.8.4.7 Rating Option Settings

In the 070 Meter Query or Configuration Request transaction, Field 3025 (Carrier Code) and Field 3062 (Rate Quote Type), are enhanced to configure the rating option settings for FedEx Express, FedEx Ground, and FedEx SmartPost. The two new additions are:

- Discount Rate, List Rate, and Alternative Rate
- Discount Rate and Alternative Rate

These new Rating Options values are added for Express, Ground, and SmartPost on the Meter Settings tab, as shown. Express Options also includes the Discount option.
When the **Discount** option is selected, a new window opens. This figure shows the Discount Options screen for FedEx Express.
Ground Discount Options will only have an Earned checkbox.

This figure shows the Discount option for the SmartPost Setting tab.

Note: In order to exclude Earned or Bonus discounts (or both) you will need to check at least one checkbox in the Discount Options as well as at least one checkbox below, which indicates which fields you want the discounts excluded from. If you do not at least check one checkbox from each, then discounts will not be excluded.
2.9 About FedEx SmartPost Configuration

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. FedEx SmartPost configuration settings can be enabled and disabled with User Level Access.

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 FedEx SmartPost Configuration Settings on SmartPost Settings Tab. 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

Shipping both FedEx SmartPost outbound and FedEx SmartPost Returns requires 2 separate accounts and meters configured.

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.

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. Another option to download rates is to run the 057 Demand Download Request Transaction.
Table 20: FedEx SmartPost Options

<table>
<thead>
<tr>
<th>Settings</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Rating Options</td>
<td>For the meter(s) on your server (U.S. origins only), there are two rating options:</td>
</tr>
<tr>
<td></td>
<td>- None - No rates are returned</td>
</tr>
<tr>
<td></td>
<td>- Discount - Only discount rates are returned</td>
</tr>
<tr>
<td></td>
<td><strong>Default</strong>: Discount</td>
</tr>
<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>Settings</td>
<td>Description</td>
</tr>
<tr>
<td>--------------------------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td><strong>Customer ID</strong></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><strong>Mailer ID</strong></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><strong>Customer Distribution Center</strong></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><strong>Pick Up Carrier</strong></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>
<tr>
<td><strong>Hub ID</strong></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, then the following error message is returned: “SmartPost Hub ID Field cannot be left blank”.</td>
</tr>
<tr>
<td><strong>Postal Classes Allowed</strong></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><strong>Delivery Confirmation Default</strong></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><strong>Auto Close time</strong></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>
### Rate Reply Content Options

Discount Options include:
- Exclude Earned Discounts
- Use Discount Options with the Standard Rate Reply tags.
- Use Discount Options with the Alternate Rate Reply tags.

**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.

#### 2.9.1 Configuring FedEx SmartPost Returns Service

You must download “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.
5. Click **Add** and a pop-up window displays.
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.
11. Then the account information will display in the bottom portion of the SmartPost Settings tab.
12. Click Apply.

2.9.2 Obtaining Tracking Numbers

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 Tracking Numbers Tab.

1. Download the DCNs from the Demand Download Screen when the FedEx SmartPost Delivery Confirmation Default checkbox is checked.
2. Download the “Update Features” from the Demand Download Screen when the FedEx SmartPost Update Features checkbox is checked.

Use FedEx SmartPost Settings Fields to guide your selections.

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

Table 21: FedEx SmartPost Settings Fields

<table>
<thead>
<tr>
<th>Settings</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Customer ID</td>
<td>Your 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 used by the United States Postal Service to identify mail owners and mailing agents or other service providers, such as consolidators. The Mailer ID used on packages tendered to FedEx SmartPost is a 9-digit number issued by FedEx and is embedded within the FedEx SmartPost tracking number.</td>
</tr>
<tr>
<td>Customer Distribution Center</td>
<td>This two-digit number indicates the distribution center that supports your shipping location according</td>
</tr>
<tr>
<td>Settings</td>
<td>Description</td>
</tr>
<tr>
<td>---------------------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>to the Mailer ID. This is entered during configuration and is part of the electronic FedEx SmartPost shipping manifest file.</td>
<td></td>
</tr>
<tr>
<td>PickUp Carrier</td>
<td>Identifies the FedEx service that is used by FedEx to deliver the item to the United States Postal Service (USPS) for final delivery.</td>
</tr>
<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, then 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>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 Modify and Delete buttons to update the Returns account information.</td>
</tr>
</tbody>
</table>

3. Click the Tracking Numbers tab.
   a. The Tracking Numbers tab shows the Delivery Confirmation Number (DCN) ranges, as shown in Tracking Numbers Tab.
The Tracking Numbers tab includes:

- **SmartPost Delivery Confirmation Numbers** — displays current range of Delivery Confirmation Numbers (DCN) in the Start, End, and Current fields. Refer to the *FedEx Ship Manager Server® Developer Guide* for information on setting the future range of DCN to the current range. Displays when Current Tracking Numbers option is selected.

- **SmartPost Future Delivery Confirmation Numbers** — contains the Start and End numbers that are received from FSMS for a Future Range of DCNs. Note: Displays when Future Tracking Numbers option is selected.

- **Edit Tracking Number** — allows a FedEx representative (Field Level access or higher) to edit the FedEx SmartPost Delivery Confirmation Numbers in an emergency situation.

- **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.
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. Note that if you have just created a meter using the MRU or just added one to the FSMS Configuration Utility, you must perform a Demand Download of "Update Features" prior to downloading SmartPost Delivery Confirmation Numbers. This will ensure you receive IMPB SmartPost Delivery Confirmation Numbers.

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. If there is both a current and future SmartPost Delivery Confirmation range, then the Demand Download will fail as this is the most you can have at one time.

In addition, at reconcile, if more than 80% of the current range has been used, then a request will be sent from the FedEx server to FedEx to retrieve a new SmartPost range.
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. FedEx Demand Download Utility shows the new options for FedEx SmartPost CNs.

The seven-digit IMPB 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.

### 2.9.3 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 menu for handling charges for FedEx SmartPost shipments.

Configure fixed and variable handling charges for FedEx SmartPost shipments.

1. To configure FedEx SmartPost Handling Charges, 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 Handling Charges Dialog for FedEx SmartPost. 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.
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 Handling Charges Fields):

a. Request
   - 1588 - Handling Charge Type
   - 1595 - Handling Charge Amount or Percentage
   - 1606 - Handling Charge Application Point

b. Reply
   - 1596 - Handling Charge
### Table 22: 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 Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1595-#</td>
<td>Max=7.2</td>
<td>N</td>
<td>I</td>
<td>FDXE, FDXG, FDXS</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>
</tbody>
</table>

Handling Charge Amount or Percentage  
Transactions: 020 Global Ship Request

<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 Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1596</td>
<td>Max=11.2</td>
<td>N</td>
<td>O</td>
<td>FDXE, FDXG, FDXS</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>
</tbody>
</table>

Handling Charge  
Transactions: 120 Global Ship Reply, 125 Rate Available Services Reply
## Configuration of FedEx Ship Manager Server

### 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 Description</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Handling Charge Type</td>
<td>Transactions: 020 Global Ship Request</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>
</tr>
</tbody>
</table>
|         |       |   |   |               |       | 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. |

<table>
<thead>
<tr>
<th>Handling Charge Application Point</th>
<th>Transactions: 020 Global Ship Request</th>
<th></th>
<th></th>
<th></th>
<th></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>
</tr>
</tbody>
</table>
|       |       |   |   |               |       | 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. |
2.9.4 Manually Downloading FedEx SmartPost Rates

1. Open the FedEx Demand Download Utility, as shown in FedEx Demand Download Utility.
2. Ensure the correct Meter/Account is selected.
3. Expand the Rates checkbox.
4. 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).

5. Select Start.
6. After the FedEx SmartPost files have been loaded, click the Exit button twice to completely exit out of the Demand Download utility. Once exited, FSMS will implement the rates that were downloaded.

   Note: FedEx Demand Download Utility shows the Update Features checkbox, which allows customers to request FedEx SmartPost updates.
Figure 59. FedEx Demand Download Utility

Note: Rates and Earned Discounts can be automatically downloaded with User Level Access.
2.9.5 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" or 4" x 9" thermal label size with and without doc-tabs for FedEx SmartPost shipments.

2.9.5.1 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 the “Doc-Tab Fields” table in the FedEx Ship Manager® Server Developer Guide for descriptions of doc-tab fields for intra-U.S. Outbound shipping labels that will be printed in the doc-tab portion of the FedEx SmartPost label.

Table 23 describes the default doc-tab fields for intra-U.S. Outbound shipping labels that will be printed in the doc-tab portion of the FedEx SmartPost label.

Table 23: FedEx SmartPost Default Doc-Tab Fields for Shipping Labels

<table>
<thead>
<tr>
<th>Position</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>

2.9.5.2 Configuring Customizable SmartPost Doc-Tab Labels

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

1. To configure custom FedEx SmartPost Doc-Tab labels, go to the FedEx Configuration Utility and click Doc-Tab Settings.
2. Under **Shipping Type**, select **SmartPost**, as shown in [SmartPost Option Selected on the Doc-Tab Settings Tab](#).

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.

6. 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 menu:
   
   - 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

7. You can enable the **Reference** checkbox to have this field included on the label when it is printed.

8. 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. If **No Shiptime Rates** is enabled on the Meter Settings tab, then the doc-tab reference field rate data will be blank when printed.
9. 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.

10. Click **Apply** or **Apply & Exit** to save your selections.

**Figure 60.  SmartPost Option Selected on the Doc-Tab Settings Tab**

---

### 2.9.6 Configuring FedEx SmartPost Reports

To configure FedEx SmartPost Detail report and a Manifest report, see [FedEx SmartPost Detail Report](#) and [FedEx SmartPost Manifest Report](#) for information on how to print these reports.

1. To print a FedEx SmartPost Detail or Returns report perform the following steps.
   a. From the FedEx Configuration Utility, click **Report Settings**.
   b. Under the Report > SmartPost list, click the **Detail** option or the **Returns** option, as shown in the following figure.
2. To configure a FedEx SmartPost Manifest Report perform the following steps.
   a. Click the Manifest option as shown in the following figure.
   b. 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
   c. Select the Headings and values to print in the Doc-Tab portion of the label.
3. Click Apply or Apply & Exit.
2.9.7 FedEx SmartPost Detail Report

Print the FedEx SmartPost Detailed Report in an

- 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)
Figure 62. FedEx SmartPost Detailed Report

FedEx Shipment Summary Report  
Date: 08/28/2013

Meter Number:  
Express Cycle: 0001  
Ground Cycle: 0001

Express Cycle Start Time:  
Express Cycle Complete Time:  
Ground Cycle Start Time:  
Ground Cycle Complete Time:  

<table>
<thead>
<tr>
<th>Service</th>
<th>Packages Shipped</th>
</tr>
</thead>
<tbody>
<tr>
<td>Priority Overnight</td>
<td>0</td>
</tr>
<tr>
<td>2Day AM</td>
<td>0</td>
</tr>
<tr>
<td>2Day</td>
<td>0</td>
</tr>
<tr>
<td>Standard Overnight</td>
<td>0</td>
</tr>
<tr>
<td>Express Saver</td>
<td>0</td>
</tr>
<tr>
<td>Early Overnight</td>
<td>0</td>
</tr>
<tr>
<td>Express Return Labels</td>
<td>0</td>
</tr>
<tr>
<td>International Priority</td>
<td>0</td>
</tr>
<tr>
<td>International Economy</td>
<td>0</td>
</tr>
<tr>
<td>International First</td>
<td>0</td>
</tr>
<tr>
<td>Early Overnight Freight</td>
<td>0</td>
</tr>
<tr>
<td>1Day Freight</td>
<td>0</td>
</tr>
<tr>
<td>2Day Freight</td>
<td>0</td>
</tr>
<tr>
<td>3Day Freight</td>
<td>0</td>
</tr>
<tr>
<td>International Priority Freight</td>
<td>0</td>
</tr>
<tr>
<td>International Economy Freight</td>
<td>0</td>
</tr>
<tr>
<td>Ground</td>
<td>0</td>
</tr>
<tr>
<td>Home Delivery</td>
<td>0</td>
</tr>
<tr>
<td>Ground Return Labels</td>
<td>0</td>
</tr>
<tr>
<td>Home DeliveryReturn Labels</td>
<td>0</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Subtotal</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Domestic Express Subtotal</td>
<td>0</td>
</tr>
<tr>
<td>Domestic Express Freight Subtotal</td>
<td>0</td>
</tr>
<tr>
<td>International Express Subtotal</td>
<td>0</td>
</tr>
<tr>
<td>International Express Freight Subtotal</td>
<td>0</td>
</tr>
<tr>
<td>Ground Subtotal</td>
<td>0</td>
</tr>
<tr>
<td>Home Delivery Subtotal</td>
<td>0</td>
</tr>
<tr>
<td>Return Subtotal</td>
<td>0</td>
</tr>
<tr>
<td>Total Packages Shipped</td>
<td>0</td>
</tr>
</tbody>
</table>

Note: Package counts do not contain any Online Return shipments processed through FedEx Ship Manager Server.
2.9.8 FedEx SmartPost Manifest Report

The FedEx SmartPost 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 63. FedEx SmartPost Manifest Report**

**FEDEX GROUND PICK-UP MANIFEST**

<table>
<thead>
<tr>
<th>Tracking#</th>
<th>CDP</th>
<th>Decl. Val.</th>
<th>Overseas</th>
<th>Overseas</th>
<th>Overseas</th>
<th>Add'l</th>
<th>Residential</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>(if &gt; $100)</td>
<td>I</td>
<td>II</td>
<td>III</td>
<td>Handling</td>
<td></td>
</tr>
<tr>
<td>1234567890123</td>
<td>0123</td>
<td>456789</td>
<td>01</td>
<td>02</td>
<td>03</td>
<td>04</td>
<td>05</td>
</tr>
<tr>
<td>1234567890123</td>
<td>0123</td>
<td>456789</td>
<td>01</td>
<td>02</td>
<td>03</td>
<td>04</td>
<td>05</td>
</tr>
<tr>
<td>1234567890123</td>
<td>0123</td>
<td>456789</td>
<td>01</td>
<td>02</td>
<td>03</td>
<td>04</td>
<td>05</td>
</tr>
<tr>
<td>1234567890123</td>
<td>0123</td>
<td>456789</td>
<td>01</td>
<td>02</td>
<td>03</td>
<td>04</td>
<td>05</td>
</tr>
<tr>
<td>1234567890123</td>
<td>0123</td>
<td>456789</td>
<td>01</td>
<td>02</td>
<td>03</td>
<td>04</td>
<td>05</td>
</tr>
</tbody>
</table>

Total Packages: 0 0 0 0 0 0 0

1. The liability of FedEx Ground is limited to the sum of $100.00 per package, unless a higher value is declared by a shipper and an additional charge is paid at the rate set forth in the current FedEx Ground rate schedule and tariff per each $100.00 of additional value or fraction thereof. Claims not made to FedEx Ground within 9 months of the scheduled delivery date are waived.

2. The entry of a C.O.D. amount is not a declaration of value.

3. In no event shall FedEx Ground be liable for any special, incidental or consequential damages, including, without limitation, loss of profits or income, whether or not FedEx Ground has knowledge that such damages might be incurred.

---

This section to be completed by Driver

Total Ground Page: 1 Preprinted Bar Codes: 0

Total Air Packages: 0

Drivers Signature: 0 Total International: 0

Package: 0

---

Pickup #: 1

This section completed for spotted trailers

Shipper: 0 Trailers #: 0
2.9.9 FedEx SmartPost Returns Report

Print the FedEx SmartPost Returns Report:

- 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)

![FedEx SmartPost Returns Report](image)

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

2.10 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.

1. To configure Advanced Settings, perform the following steps.
   a. If the Advanced Settings tab is not displayed, click the Access Privileges button and type the password for Field Level access privileges.
   b. Click the Advanced Settings tab. Advanced Settings Tab shows the Advanced Settings tab when a meter is set up for U.S.-origin shipping.
c. Configure the Advanced Settings, and then click Apply or Apply & Exit to save your selections.

Table 24 describes the settings on the Advanced Settings tab.

Table 24: Advanced Settings Tab Fields

<table>
<thead>
<tr>
<th>Setting</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 FSMS Configuration Utility), FSMS performs a Close for you. To prevent interruption in your shipping activities, choose a Force Close Time that will occur after your shipping day is</td>
</tr>
</tbody>
</table>
2.10.1 New Options in Advanced Settings Tab

A new option to retain the label buffer by number of days is added to the Advanced Settings Tab. The initial default maximum number of days is three; however, you can decrease that number.
The new "Label Buffer Retention Period" option is displayed on the "Advanced Settings" tab at the "User View" access level, but it will be grayed out.

The new "Label Buffer Retention Period" option is enabled for configuration for the following access levels:

- Field Level
- Support Level

For any new install or clean load of FSMS 14.01, the new "Label Buffer Retention period" option is set to its default of 3.
Upon upgrade from FSMS 14.01 to a greater version, the setting of the "Label Buffer Retention Period" in place on the Advanced Settings tab at the time of the upgrade is carried over by meter.

Note: There is a possibility that your hard drive capacity to store the label buffers could max out prior to the 3-day maximum you may have configured on the Advanced Settings tab. There is no way for the FSMS software to know or predict these limitations. Therefore, it is your responsibility to be aware of and manage capacity as it relates to label buffers.

### 2.11 IPD / IED / IDF Configuration 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.

![IPD / IED / IDF Settings Tab](image-url)
The IPD / IED / IDF Settings tab 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. This tab requires Field Level access privileges. For more information, see the FedEx Ship Manager® Server Developer Guide.

When you click the Add button, the Add IPD Importer of Record (IOR) screen appears, where you will enter the IOR information.

Note: Do not use the FedEx Clearance Facility as the IOR information.

Figure 68. Add Importer of Record
2.12 Configuring Tracking Numbers

The Tracking Numbers tab provides information for FedEx (FedEx Express and FedEx Freight) FedEx Ground, and FedEx SmartPost tracking number management. No entries are required in this window. The Tracking Numbers tab requires User-Level View access privileges.

Figure 69. Tracking Numbers Tab

1. To view Tracking Number settings, perform the following steps.
   a. If the Tracking Numbers tab is not displayed, click the Access Privileges button.
   b. In the Password box type View then click OK.

   Note: The password is case-sensitive; type View with an upper case V.
2.12.1 Downloading FedEx 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 FedEx Future Tracking Numbers area.

1. Download FedEx tracking numbers using the following two utilities. Demand Download Utility, which is available in the FSMS folder on your desktop. Meter Registration Utility during the meter registration process.

2.12.2 Editing FedEx Tracking Numbers

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

1. To edit FedEx tracking numbers, perform the following tasks.

The system displays a warning message to prompt you to suspend all shipments before you edit tracking numbers.

a. On the Tracking Numbers tab, click Edit Tracking Numbers. If the check box for tracking numbers cannot be checked, the tracking numbers already exist in the database.

b. Make your changes in the FedEx Tracking Numbers section, then click Apply and Apply & Exit.

If you enter an invalid value, the number turns red.

2.12.3 Enabling and Monitoring 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. This is true unless you are using EPIC ground (FDX1D) in which case ground shares the same tracking range with Express. The range is available when the master meter is properly configured by a FedEx Customer Service 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 the following figure 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.
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.

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 Service representative or field personnel.

2. To enable FedEx Ground tracking numbers, perform the following steps.
   a. Open the FedEx Configuration Utility.
   b. Click the Meter Settings tab.
   c. In the Ground Options section, check the Ground Enabled box.
   d. Click Apply to apply your changes or click Apply & Exit to apply your changes and close the utility window.

3. To monitor FedEx Ground tracking numbers, perform the following tasks.
   a. Open the FedEx Configuration Utility.
   b. Click the Tracking Numbers tab. The FedEx Ground Tracking Numbers Prefixes section shows the FedEx Ground accounts and tracking number ranges for the selected meter number. Values for the tracking number range fields (Start, End, Current) must be specific to each FedEx Ground account on your system. Use the information in this table to guide your entries.

   Note: You cannot edit account or tracking numbers.

Table 25: FedEx Ground Tracking Number Prefixes

<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>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.</td>
<td>Tracking number at end of range.</td>
</tr>
</tbody>
</table>
The **FedEx Ground Tracking Numbers Prefixes** section is password protected. To change your tracking numbers, contact your FedEx customer service representative. Your FedEx customer service representative can use the following tracking number options. This table describes settings for FedEx Ground tracking number options.

### Table 26: FedEx 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 FedEx Ground tracking number range to all of the FedEx Ground® accounts on the system.</td>
</tr>
<tr>
<td>Edit</td>
<td>Edit the FedEx 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 <a href="#">FedEx Ship Manager® Server Developer Guide</a> for more information about how to manage FedEx Ground tracking numbers.</td>
</tr>
<tr>
<td>Reset Range to Default</td>
<td>Reset FedEx Ground tracking number range to the default range for a selected FedEx Ground account number.</td>
</tr>
</tbody>
</table>

### 2.12.3.1 Allocation of FedEx Ground Tracking Numbers

FedEx Ship Manager Server allocates the FedEx 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
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
2.12.3.2 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.

2.13 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.

2.14 FedEx SmartPost Returns Tracking Numbers Prefixes

As a result of adding the FedEx SmartPost 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 columns.

See the FedEx Ship Manager® Server Developer Guide for instructions on how to configure settings for optional FedEx SmartPost service.

2.15 Troubleshooting Via 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

2.15.1 Initiate a GoToAssist Session

In the FedEx Ship Manager folder on your desktop, double-click the HelpMe FedEx icon.

2.16 Setting 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.

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.

1. To verify the status of FedEx Ship Manager Server services, click Start > Settings > Control Panel.

   The Windows Control Panel appears.

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.

9. 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.

10. If you logged into the system using the correct account, then check the following settings:
   a. 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.
   b. Make sure that account has administrator privileges.
      You can check this in Control Panel &gt; User Accounts.

11. 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 &gt; Administrative Tools &gt; Services to verify that the FedEx services are running.

### 2.17 Troubleshooting Printer Problems

If you are having trouble printing labels or reports from FSMS:

1. Verify that Windows can communicate with your printers, such as creating a short document in Windows Notepad, then printing it from Notepad. If your printer is properly configured, then you will be able to select the printer in the Print dialog box.

2. If you cannot see the printer, then reinstall the printer according to the printer manufacturer’s documentation.

3. Do not create a ‘Print to File’ printer and set it for any EOD reports. When anything is printed to this type of printer, a dialogue box pops up asking for the file name. This dialogue box doesn’t show up when FSMS tries to print to this type of printer. Therefore, the CLOSE process never finishes, even after a restart of services.
2.18 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. Browse to the FedEx Ship Manager Software directory (default is C:\FedEx) and double click on the Fedex_Bin folder.
2. Double click on the icon named CommSetup.exe.
3. 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. 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.

2.19 Selecting 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.
2. See Supported Thermal Printers, Supported Dot Matrix Printers or Supported Laser Printers for a list of the printers supported by FSMS.
3. Define the printer to be used by each label and report as described in Labels Default Configuration and Reports Default Configuration.

2.19.1 Default Printer Settings

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 Supported Thermal Printers, Supported Dot Matrix Printers or Supported Laser Printers for a list of thermal, dot matrix and laser printers supported within FSMS.
2.19.1.1 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.

2.19.1.2 Labels Default Configuration

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 Label Defaults 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.

2.19.1.3 Reports Default Configuration

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 for information on how to define the default printer for different reports.

2.19.1.4 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.

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.
3 FedEx Rate and Data Downloads

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 at the reconcile time.

3.1 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
- Ground List Rates
- SmartPost Rates
- SmartPost List Rates
- SmartPost Earned Discounts
- Tracking Numbers — available for FedEx (FedEx Express and FedEx Freight), FedEx Ground, and FedEx SmartPost shipping
- URSA Table — available only for the master meter
- 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
3.1.1 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.

3.1.2 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.

3.1.3 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.

3.2 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

3.2.1 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: You cannot set the Reconcile Time to 0000.*
3.2.2 FedEx Ship Manager Server Transaction Requests

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

**Table 27: Transaction Download 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 indicates which downloads you want 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.

3.2.3 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.

1. To run the Demand Download Utility, perform the following steps.
   a. 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 Bonus and Earned Discount Option on the Demand Download Utility).
   b. In the Meter/Account list, click the meter for which you want to perform a download.
   c. 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).
      *Note: Files available only for the master meter are system level components and are not meter-specific.*
   d. 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.
   e. To exit the Demand Download Utility, click Exit.
Note: FedEx Ship Manager Server does not implement the data you downloaded until you completely exit the Demand Download Utility.

FedEx Ship Manager Server downloads the Bonus Discounts via DLL (Downline Load) at reconcile time.

This figure shows the FedEx Demand Download Utility for Express Bonus/Earned Discounts

**Figure 71.** Bonus and Earned Discount Option on the Demand Download Utility
3.3 Downloading Rates and Discounts

Use the Demand Download Utility to manually update the rates and discounts that you use for FedEx Express and FedEx Ground® shipments and to request updated rate and discount information.

1. To run the Demand Download Utility and download rates and/or discounts, perform the following steps.
   a. 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 displays.
   b. In the Meter/Account list, click the meter for which you want to perform a download.
   c. Select the Rates checkbox.
   d. Select the checkbox next to the FedEx Express rates you want.
      You can download the following 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
      - Ground List Rates
      - SmartPost Rates
      - SmartPost List Rates
      - SmartPost Earned Discount Rates
   e. Click Start to download the selected items.
   f. 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.
   g. To exit the Demand Download Utility, click Exit.
Note: FedEx Ship Manager Server does not implement the data you downloaded until you completely exit the Demand Download Utility.
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. 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.

You can backup from any version from 12x and above families and restore only in the same version that you backed up the data from. For example, you can backup from 1205 and restore in 1205; you cannot restore in say, 1206.

Also, note that you can restore only on a clean database and not on a database that already has data.

If you are generating custom labels or saving label buffer files or 2D barcode files to a folder such as FedEx Temp, include cleaning up that folder in your maintenance schedule to avoid performance issues.

The utility will detect the version of the FSMS currently being used. In the scenario where you attempt to run the utility on a system that does not have a supported version of FSMS installed, a window with the following message will be returned: “The supported FSMS version could not be found.” As a result, the utility will not run and an ‘OK’ information window will be displayed and when ‘OK’ is clicked the utility will exit.
The following data can be backed up by selecting the appropriate checkboxes in the ‘Select Data’ section:

- Meter Configuration
- System Configuration
- Rate Files
- Database
4.1 Backup functionality

- When the 'Backup' radio button is selected the 'File' and 'Select Data' selection will become active. When the 'Start' button is clicked the utility will back up the selected data to the designated file.
- When 'Backup' radio button is selected the default file entry will be set to '%APPDATA%\FedEx\Backup.'
- You will have the ability to enter or select a different file and location to store backed up information.
- When the 'Backup' radio button is selected, all the checkboxes under 'Select Data' will be defaulted to checked. You can then select the data components you wish to back up. If the directory is modified it will reset all check boxes to checked under the 'Select Data' section.

4.2 Restore functionality

The restore functionality of this utility will only support the version that is backed up.

When the 'Restore' radio button is selected, then the 'File' and 'Select Data' selection will become active. When a file is selected via the 'File Picker', the utility will check the file and make active those checkboxes that have data backed up and deselects and deactivates those checkboxes that do not have data.

When the 'Start' button is clicked the utility will stop all appropriate services, restore the selected data information to the applicable directories and restart services.
Note:

- The ‘Meter Configuration’ checkbox can be used only to restore Meter Configuration Information.
- The ‘System Configuration’ checkbox cannot be used unless the ‘Meter Configuration’ checkbox information is selected.
- If the ‘System Configuration’ checkbox is checked the ‘Meter Configuration’ checkbox will be auto-checked.
- If ‘Meter Configuration’ and the System Configuration are checked and you un-check the ‘Meter Configuration’ checkbox then ‘System Configuration’ checkbox will be un-checked automatically.

In the scenario where you select ‘Restore’ radio button and attempt to restore backed up information on a different version, the utility compares the backed up version to the version installed and the following window text will be returned. “The version you are restoring does not match the backed up version”, and the restoration will be aborted and ‘OK’ information window will be displayed.

In the scenario where you select ‘Restore’ radio button and attempt to restore backed up information and you are unable to do so, then the following window text will be returned. “The selected data cannot be
restored!, and the restoration will be aborted and any information restored until that point will be reversed and 'OK' information window will be displayed.

Once files are restored the ‘Files Restored’ window will be displayed. On clicking ‘OK’, the following information window will be displayed. "It is recommended that a demand download be executed for all support files to ensure most up to date data is available for shipping." If ‘OK’ button is clicked the window will close and will be returned to the Utility window.

Figure 74. Restore Information
4.3 Support

The utility has the ability to gather critical files needed, for troubleshooting purposes, and compress them to facilitate file transfer. This is supported by an additional tab called 'Support'. Note that this tab will be visible to all access levels.

The file default entry is set to '\%APPDATA%\FedEx\Backup'. You will have the ability to enter or select a different file and location to store support information. If the support data file is present in the defined location and the 'Start' button is clicked, the utility will overwrite the current information.

![Figure 75. Support functionality](image)

The Support information checkboxes will gather the following when checked.
- Always selected and cannot be de-selected:
  - Meter & System Configuration: Etc, FedEx_Comm, FedEx_Tc, & FedEx_Cfg Folders
  - Transaction Logs: trans.in & trans.out
  - Event Logs: FedEx Event Logs, Application Event Logs, & System Event Logs
  - Web Services Logs: %APPDATA%\FedExWebSvcsLog folder.

- Always selected and can be de-selected at the User Level:
  - Ship Database: ship.db, ship.log, and FedEx_Scripts folder
    - Active = Live shipping data
    - Backup = Backup shipping data based on settings found in System Settings Tab in FSMS Configuration

- Rate Files: Configured rate data files location (example: install drive\FedEx\dotnetrating)

The Ship Database checkbox will function as follows:

- Default - Ship Database is checked with the sub checkboxes ‘Active’ and ‘Backup’ enabled and checked when the Support tab is clicked
- ‘Active’ and ‘Backup’ checkboxes can be checked and unchecked independently of each other.
  - If neither the ‘Active’ nor the ‘Backup’ checkboxes are checked then the Ship Database will be unchecked and no database information will be captured upon clicking the ‘Start’ button.
When the selected files are copied and compressed an information window will display the following information:

“The following file(s) have been successfully copied and compressed from FSMSXXXX version as listed:
<List all selected files>”

Note: ‘XXXX’ represents the software version detected by the utility.

### 4.4 Configuring Database Settings

Use the FedEx Ship Manager® Server Configuration Utility **System Settings** tab, as shown in **System Settings Tab**, to define backup and file retention settings.

1. Under **Database**, in the **Backup Time** field, specify the time each day for the FedEx Ship Manager® Server to back up shipping data to the specified directory.
   
   Specify the time in the 24-hour (hhmm) format (for example, 0100 equals 1 a.m.).

2. In the **1st Backup Directory** field, type a directory path or click the Folder icon ( ) to browse and select a directory.

3. In the **2nd Backup Directory** field, type a directory path or click the Folder icon ( ) to browse and select a directory.
Note: If **No Shiptime Rates** is selected on the Meter Settings tab, then no rates will be stored in the database.

### 4.5 Configuring Ship History Settings

Use the FedEx Ship Manager\textsuperscript{®} Server Configuration Utility **System Settings** tab, as shown in **System Settings Tab**, to define file retention settings.

1. In the **Retention Interval** field, specify the length of time your FedEx Express\textsuperscript{®} shipping history information is stored by FedEx Ship Manager\textsuperscript{®} Server.

2. In the **Purge Time** field, specify 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.

3. In the **Export Time** field, specify 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.

4. In the **Domestic Express** field, type a directory path or click the Folder icon ( ) to browse and select a directory.

5. In the **International Express** field, type a directory path or click the Folder icon ( ) to browse and select a directory.

6. In the **International MPS Express** field, type a directory path or click the Folder icon ( ) to browse and select a directory.

7. In the **Ground** field, type a directory path or click the Folder icon ( ) to browse and select a directory.

8. In the **LTL Freight** field, type a directory path or click the Folder icon ( ) to browse and select a directory.

9. In the **SmartPost** field, type a directory path or click the Folder icon ( ) to browse and select a directory.