



FEDEX® AUTOMATION TOOLBOX USER GUIDE

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OVERVIEW

FedEx® Automation Toolbox is a desktop application based on FedEx Web Services that provides quick and easy access to the following pre- and post-ship functions: rating, tracking, downloading signature proof-of-delivery letters, sending FedEx ShipAlert® notifications, verifying addresses, and finding FedEx locations. The application offers simple setup and customization, batch features, and integration.

Features

Use FedEx Automation Toolbox to:

- Get rates and transit times
 - Get rates and transit times quickly, right on your desktop.
 - Set field defaults so you only need to enter a weight and ZIP code.
 - Batch-rate shipments quickly and easily, using a wizard to guide you through a few simple steps.
 - Export or print rate quotes.
- Track your shipments
 - Track the status of your shipments by tracking number or reference.
 - Download Signature Proof of Delivery information.
 - Track multiple shipments in batch mode.
 - Add shipment notifications after a package has shipped.
- Verify addresses
 - Check to see if an address is residential or commercial.
 - Improve shipment accuracy by obtaining correct address information.
- Find FedEx locations
 - Find FedEx locations quickly. Simply enter a ZIP code or city and state.
 - Filter results so you can see exactly what you want.

INSTALLING FEDEX® AUTOMATION TOOLBOX

Important: Please ensure that you have discussed the placement process with your assigned FedEx Customer Technical Consultant (CTC) before installing FedEx Automation Toolbox.

System Requirements

Before you install FedEx Automation Toolbox, verify the following:

- A high-speed internet connection is required.
- The user must be logged into the PC with Administrative rights (for installation only).
- The system is current with Microsoft® Windows® Update for all patches and bug fixes. It is important that your system is current with Microsoft Windows Update for all patches and bug fixes before you install FedEx Automation Toolbox.

The following software is required to use FedEx Automation Toolbox:

Microsoft .NET Framework (Latest Version): Microsoft .NET Framework is required to run FedEx Automation Toolbox. See **Appendix D** for instructions on checking to see if Microsoft .NET Framework is installed. The minimum version required is 4.5.2 but it is recommended to have the latest version installed on your system.

- Adobe® Reader®: Adobe Reader is required to display any FedEx Signature Proof of Delivery letters that may be downloaded onto the client system.

Recommended Minimum Hardware Configuration

- Operating System: Windows 10 with latest Service Packs & Windows updates
- Processor: 2 gigahertz (GHz) or faster processor
- RAM: 8 gigabyte (GB) minimum
- Free Hard disk space: 16 GB
- Display: 1280 x 1024

Installing FedEx Automation Toolbox

To install FedEx Automation Toolbox:

1. Close all open files and programs.
2. Go to the FedEx Automation Toolbox website: <http://www.fedex.com/toolbox>.
 - a. Click **Download Toolbox** to download the installer.
 - b. Execute the installer to begin the installation.
3. The program verifies application requirements. The internet connection speed will determine how long this will take.

Note: If the latest Microsoft .NET Framework is not installed on your system, you will be prompted to download it before completing the FedEx Automation Toolbox installation.

4. After the application components are verified, click **Next**.
5. The installation program creates the folder **C:\ProgramData\FedEx Client** on the local computer and copies the application files into it.
6. Once installation is complete, click **Finish** (or the FedEx Toolbox desktop icon) to launch Toolbox.

Configuring FedEx Automation Toolbox

Once FedEx Automation Toolbox is installed, the configuration screens appear automatically.

1. **Welcome** - Select a Country or Territory, and Language. Then review the End User License Agreement and click **"I accept the terms of the license agreement"**.
2. **Features** - Enter the FedEx 9-digit account number and the corresponding Toolbox Core Features product code provided by your FedEx representative.

Note: If you have FedEx Desktop Customer Tools installed on the same PC, a product code is not needed. (See next section **FedEx Desktop Customer Tools Migration**.)

Toolbox automatically includes Address Checker, FedEx Locator, Rates and Transit Times, and Tracking. Click the Yes/No indicator to indicate what module will be installed then click ➡ to continue.

3. Click ➡ to download any updates; after download is complete click **Yes** to perform a restart of Toolbox.

FedEx Desktop Customer Tools Migration

If Toolbox detects FedEx Desktop Customer Tools (FXCT) on your PC, you may choose to migrate the accounts, databases, and settings from FXCT to Toolbox.

Toolbox will import the following settings from FXCT:

- Default settings
- Databases
- Address Book
- Boxes and Weights
- Tracking Third-Party Accounts
- Accounts
- Batch Profiles
- Rating
- Transit Times
- Tracking

If you choose to *Complete Later*, you may access the Customer Migration Tool by going to:

File > Application Configuration > Customer Tools Migration.

After the migration process has completed, a log file called **FXCTMigration.log** will be created in **C:\ProgramData\FedEx Client\Logging**. The log can be used as a recap of the migration and for troubleshooting any failures that occur.

Accounts

The **Create Account** screen allows you to add FedEx accounts to Toolbox for rating and tracking purposes. You will need a 9-digit FedEx account number and the corresponding Shipping and Billing addresses.

Note: Accounts migrated from FXCT will automatically be added to Toolbox after you have performed the Customer Tools Migration step.

1. Click **Add Account** to add an account to Toolbox.
2. Enter the appropriate information on the **Main** tab. Required fields are in bold.
3. The **Freight** tab is optional. Enter the Billing/Mailing Address to add a FedEx Freight account. Indicate whether the account type is a Bill-To account by checking the Bill-To box. Shipping Address is required if it is different from the Billing Address on file with FedEx Freight. Check with your FedEx account executive to confirm the correct addresses if needed.

4. To enable FedEx SmartPost® rating, select the SmartPost HUB ID on the **Additional Settings** tab by checking the **Apply Setting** box and the appropriate hub from the drop-down menu.
5. The **FIMS** and **Connections** tabs should be managed by a FedEx representative only.
6. Click **Add** to add the account(s) to Toolbox. This action will request and create a meter number from FedEx Web Services. An Internet connection is required for this request to be successful.
7. Repeat the above steps for each FedEx account number to be added to Toolbox.
8. After account numbers are added, click ➡ to continue

Adding Accounts After Installation

To add more accounts to FedEx Automation Toolbox any time after the initial installation and setup, go to:

File > Application Configuration > Account Sender Maintenance.

Configuration

The **Configure Basic User Profile** screen allows you to configure default behaviors and values for Toolbox operation. Changing configuration settings is optional.

1. Click the **Configure** button to open the configuration.
2. Make configuration changes on each of the tabs and click **Save**.
3. Click **Exit** to exit the configuration.
4. Click the **Finish** button to complete the installation configuration and exit the installer.

RATES AND TRANSIT TIMES

Use FedEx Automation Toolbox to get rates and transit times using a manual process or a batch process. The program supports package rating for:

- FedEx Express®
- FedEx Ground®
- FedEx SmartPost®
- FedEx Freight®.

Rates X

Rate/Transit | Commodities | Batch | Freight Spot Quote | User Profile: Default

Recipient Information

Address ID:

Country/Territory: US - UNITED STATES

Postal Code: Residential ☐

Shipment Information

No of Pkgs:

Total Weight: LBS

Ship Date: 10.22.2018

Total DV: USD

Drop Off Type: P - Regular Pickup

LTL Freight Class: Select

Rating Type: Simple Rate Quote

Rating Type

There are three Rating Types to select from:

- **Simple Rate Quote** – Performs rate quote based on all available services for both small-package and FedEx Freight services.
- **Detailed Rate Quote** – Performs rate quote based on specific package information for small-package, express freight, FedEx Freight (LTL), and freight box quote services.
- **Time in Transit** – Calculates the time in transit for a shipment based on sender and recipient information.

Entering Address Information

You can use the Address Book, Integration, or enter address information manually. To rate a package manually, enter the Recipient and/or Sender Country/Territory, and Postal Code.

Recipient Information	
Integration ID	<input type="text"/>
Country/Territory	US - UNITED STATES
Postal Code	<input type="text"/> <input type="checkbox"/> Residential
Sender Information	
Country/Territory	US - UNITED STATES
Postal Code	38017

To switch between using the Address Book or Integration, click either the Address ID or Integration link.

Using the Address Book

1. Either enter the **Address ID** or click the Address Book icon.

Recipient Information	
Address ID	<input type="text"/>

2. In the window that appears, highlight the address and click **Select**.

Search Address Book									
Search Option		ID	Like	<input type="text"/>	Search				
Select	ID	Contact	Company	Address 1	Country/Territory	City	State	Zip	
[Select]	000001	MAILROOM	ABC COMPANY	5101 W Waters	US	Tampa	FL	33634	
[Select]	000002	SHIPPING	MAIN STREET COMPANY	710 Dado Road	US	San Jose	CA	95131	
[Select]	000003	MY BROTHER	FAMILY	3025 S. Hanley	US	Maplewood	MO	63143	

Using Integration

To select an address using an Integration ID, you must first create an integration profile using Link, which is located on the Modules menu. For more information on creating Link profiles, go to **Appendix E**.

1. Ensure the **Integration ID** link is displayed on the Rating screen. If **Address ID** is currently displayed, click the link to change it to **Integration ID**.

Recipient Information	
Integration ID	<input type="text"/>

2. Enter the **Integration ID** of the address record you want to look up.

Simple Rate Quote

The Simple Rate Quote is based on all available services for both small-package and FedEx Freight services if applicable.

- Enter the following **Required** fields:
 - Recipient Country/Territory
 - Recipient Postal Code
 - Sender Country/Territory (if rating from a different origin than the configured sender)
 - Sender Postal Code (if rating from a different origin than the configured sender)
 - No. of Pkgs
 - Total Weight (for multiple-piece shipments enter the total weight of all packages)

The following fields are **Optional**:

- Residential indicator checkbox is required to return FedEx Home Delivery® rate quotes
 - Ship Date
 - Total DV (declared value for carriage)
 - Dropoff Type
 - LTL Freight Class (required for FedEx Freight rating)
- Click the **Quote** button in the lower-right corner of the screen.
 - Rate quotes for all available services will display. You may hover over or click a specific rate link to view the rate details.
 - You may opt to **Print**, **Export** or **Copy** the rate results to the clipboard.

Detailed Rate Quote



To perform a Detailed Rate Quote:

- Select Rating Type **Detailed Rate Quote**.
- Select the Shipment Type **Small Package**, **Express Freight**, **LTL Freight**, or **Freight Box Quote**. Selecting this option gives you access to the fields that let you enter detailed package weights and sizes.

Note: This is the ideal entry method when you want the most detailed rates possible.

- Enter the following required information:
 - Recipient Country/Territory
 - Recipient Postal Code
 - Sender Country/Territory (if rating from a different origin than the configured sender)
 - Sender Postal Code (if rating from a different origin than the configured sender)
 - Count
 - Weight
 - Residential indicator checkbox is required to return FedEx Home Delivery rate quotes
- In the data grid at the bottom of the screen, enter the count and weight of the shipment. Click the **Add** button to add more packages. The packages are added to a grid that lists the packages as you build your shipment. To delete a package from the grid, click the **Delete** icon.

Note: For multiple-piece shipments, each line represents a different package weight. For example, entering count = 3 and weight = 2 would create a 3-piece shipment with a total weight of 6 lbs.

Add	Delete	Count	Weight	Box DB	Dims (L x W x H)	DV	DG	Dry Ice	Non-Standard
		3	2		0 x 0 x 0 IN	0		<input type="checkbox"/>	<input type="checkbox"/>

- Select any applicable **Special Services** by checking the appropriate box.
- You may select a specific **Service Type** or leave it at All Services to rate all available services.
- When the screen is complete, click the **Quote** button in the lower-right corner of the screen.

International Rate Quotes

Use the Commodities tab to enter commodity information to include estimated duties and taxes in your rate quote. The Harmonized Code is required in order to include estimated duties and taxes in the rate quote.

You can access records already saved in the Commodity database by selecting it from the **Commodity ID** drop-down. You can also save new records in the Commodity database from this screen by checking the **Add New** box.

Rating FedEx Freight/LTL

To rate FedEx Freight/LTL shipments, you must have a FedEx Freight-enabled account added to Toolbox. The following additional fields are required for FedEx Freight rating:

- LTL Freight Class
- LTL Freight Package Type
- Payor Role
- Shipment Terms

The **Payor Role** and **Shipment Terms** values must match those allowed by the account number. If you are unsure which rates are loaded on your account, please contact FedEx Freight Customer Service at 1.866.393.4585.

When rating FedEx Freight LTL shipments on the Detailed Rate Quote screen, the City/State must be populated after you enter a ZIP code. Sometimes a ZIP code has more than one city associated with it, so you must select the appropriate City/State from the drop-down menu prior to rating.

Freight Box Quote

FedEx Freight Box Quotes are available only to accounts that are enabled for FedEx Freight Box. Check with your FedEx Account Representative for more information on FedEx Freight Box.

Time in Transit

FedEx Automation Toolbox allows easy access to transit times with minimal entry.

1. Select **Time in Transit** as the **Rating Type**.
2. Enter the Recipient and Sender postal codes.
3. Check Include FedEx Express Freight and/or FedEx LTL Freight to calculate the transit time for these carriers. If including FedEx LTL Freight, the **Payor Role** and **Shipment Terms** must also be set.
4. Click **Quote**.

All available services and their transit times will be displayed on the screen.

Printing and Exporting Transit Times

Just as with rate quotes, you can print and export transit-time results.

- To print the transit-time results, click **Print**.
- To export the transit-time results, click **Export**. Clicking this button starts the Export Wizard, which lets you export the transit-time results to an XLS or comma-separated values text file. For more information on Exports, see **Appendix A**.

Freight Spot Quote

FedEx Automation Toolbox can provide rate quotes for FedEx Freight® Volume Services which are specially priced freight solutions to move shipments on empty or near-empty trailers.

1. Go to the **Freight Spot Quote** tab and enter the Recipient and Sender Postal Codes and City/States.
2. Enter the shipment's **Linear Feet** and **Weight**.
3. Check any applicable **Optional or Additional Services**.
4. Click **Quote**.
5. FedEx Automation Toolbox will display rate quotes based on availability.

Batch Processing

With FedEx Automation Toolbox, you can batch-process rate and transit-time requests. The first step to batch processing is to create a batch profile. The following instructions assume that you have created a batch profile. See [Appendix B](#) for more information on creating a batch profile.

1. Go to the Batch tab and select your batch profile in the drop-down menu and click **Run**.
2. Select the file associated with the batch profile by highlighting the file name and clicking **Open** (or by double-clicking the file name).
3. The file is imported, and the batch is processed, populating the grid on the Batch tab with results.
4. Depending on the size of the batch, this may take some time. A status window appears, showing the item being processed.
5. When processing is complete, the Batch Complete message box appears. Click **Close**.
6. The rates are added to the grid. Any errors found are displayed in the Rate Status column. You can export the results to an XLS or comma-separated values text file by clicking the **Export** button. For more information on Exports, see [Appendix A](#).

Handling Charges

FedEx Automation Toolbox can be configured to add a handling charge to the returned rate quote.

1. To configure Handling Charges, go to **File > Application Configuration > User Profiles**.
2. You can choose to **Edit** an existing profile or click **Add** to create a new one.
3. Click the **Rating** tab > **Handling Charges**.
4. Select the **Application Type**: Basic or Advanced.
 - a. **Basic** – applies handling charge for all services under a FedEx carrier:
 - i. FedEx Express
 - ii. FedEx Ground
 - iii. FedEx Express Freight
 - iv. FedEx Freight (LTL)
 - v. FedEx SmartPost
 - b. **Advanced** – applies handling charge for a specific service
5. After selecting Basic or Advanced Application, set the following Default behaviors. **Note:** if you are setting a Basic handling charge, scroll down to the Basic settings. Advanced settings are preceded with “Adv” in the setting. Handling Types and Handling Amounts correspond with either Type1/Amount1 or Type2/Amount2.
 - a. **Handling Type** – Fixed Amount or Fixed Percentage of package or entire shipment
 - b. **Handling Amount** – Handling charge amount or percentage
6. **Save** your changes.

Example: Set a \$5.00 handling charge for FedEx Ground shipments. This will add a \$5.00 handling charge for multiple piece shipments. (In comparison, Fixed Amount per Package will add a \$5.00 handling charge per package in a multiple piece shipment.)

 - a. **Application Type** – Default to Basic
 - b. **Basic Ground Additional Handling Type1** – Default to Fixed Amount per Shipment
 - c. **Basic Ground Additional Handling Amount1** – Default to 5

TRACK

Use the Track module to track by FedEx tracking number, reference, RMA number, transportation control number, bill of lading number, multiple-piece shipment number or batch. To track the status of a shipment:

1. Click the **Track** button in the button bar.
2. On the **Tracking** tab, select the tracking method from the drop-down menu.
Note: When tracking using non-tracking numbers such as reference, you must enter an approximate ship date, third-party account number or destination country/territory, and postal code, if applicable.
3. Enter the FedEx tracking number(s) in the text box.
4. Check the **Download Tracking Scans** to include detailed scans.
5. Click **Search**. Results are displayed in a data grid.

Status	Tracking No.	Master Track No.	Duplicate	Ship Date	Delivery Date	Service	Status
	122816215025810		<input type="checkbox"/>	08.15.2018	01.09.2014 13:31	FedEx Ground	01.09.2014 Delivered: US

Tracking Details

To view the tracking details for a shipment:

1. Click the FedEx tracking number for the shipment in the data grid.
2. The Detailed Tracking Results screen for the selected shipment is displayed.

122816215025810

Tracking Number: 122816215025810 Reference: PO#174724

Delivered: True Invoice No:

Ship Date: 8/15/2018 Purchase Order:

Delivery Date: 1/9/2014 1:31 PM

ScanDate	Location	Details	Code	Exception Details	Exception Code
01.09.2014 13:31	Norton, VA 24273 US	Delivered	DL		
01.09.2014 04:18	KINGSPORT, TN 37663 US	On FedEx vehicle for delivery	OD		
01.09.2014 04:09	KINGSPORT, TN 37663 US	At local FedEx facility	AR		
01.08.2014 23:26	KNOXVILLE, TN 37921 US	In transit	IT		
01.08.2014 18:14	NASHVILLE, TN 37207 US	Departed FedEx location	DP		
01.08.2014 15:16	NASHVILLE, TN 37207 US	Arrived at FedEx location	AR		
01.07.2014 00:29	CHICAGO, IL 60638 US	Arrived at FedEx location	AR		
01.03.2014 19:12	SPOKANE, WA 99216 US	Left FedEx origin facility	DP		
01.03.2014 18:33	SPOKANE, WA 99216 US	Arrived at FedEx location	AR		
01.03.2014 15:00	SPOKANE, WA 99216 US	Picked up	PU		
01.03.2014 14:31	, 83854 US	Shipment information sent to FedEx	OC		

Copy SPOT Ship Alert Print Close

From the Detailed Tracking Results screen you can:

- Click **Copy** to copy the tracking details to the Windows clipboard for use in another application.
- Click **SPOD** to obtain and download a Signature Proof of Delivery in pdf format.
Note: To view Signature Proof of Delivery letters (SPODs), you must have Adobe Reader installed on your system.
- Click **Ship Alert** to send a tracking notification via email.
- Click **Print** to print the tracking details. This action will open the Print Wizard.
- Click **Close** to close this window and return to the Tracking tab.

Email Notifications

Email notifications can be added to any in-transit or recently delivered shipment. To add an Email notification:

1. In the data grid on the Tracking tab, select the row(s) you wish to add a shipment notification to. Select a row by clicking it. Select multiple rows by holding down the **Ctrl** key while clicking.
2. Click the **Email** button at the bottom of the screen.
3. Fill in the form that appears then click **Send**.

Batch Tracking

With FedEx Automation Toolbox, you can batch-process tracking requests. See [Appendix B](#) for more information on creating a batch profile.

To track using a batch profile:

1. Select **Batch Process** as the tracking method from the drop-down menu.
2. Select a batch profile in the **Profile** drop-down menu.
3. Click **Run**.
4. Select the file associated with the batch profile by highlighting the file name and clicking **Open** (or by double-clicking the file name).
5. The file is imported, and the batch is processed, populating the grid on the Batch tab with results.
6. Depending on the size of the batch, this may take some time. A status window appears, showing the item being processed.
7. When processing is complete, the Batch Complete message box appears. Click **Close**.
8. The tracking results are added to the grid. Any errors found are displayed in the Status column. You can export the results to an XLS or comma-separated values text file by clicking the **Export** button.

Printing and Exporting Tracking Results

You can print and export the batch-tracking results:

- To print the batch-tracking results, click **Print**. Clicking this button starts the Print Wizard.
- For more information on Exports, see [Appendix A](#).

FEDEX ADDRESS CHECKER

Note: Results provided by the FedEx Address Checker are believed to be reliable but are not guaranteed. Correct completion of shipping documents is the responsibility of the customer. If the delivery address is later identified as residential, you could receive a residential surcharge.

Use FedEx Address Checker to verify addresses quickly.

- Verify addresses in the U.S., Canada, and Puerto Rico.
- Indicate whether an address is suggested to be residential or commercial.

Using the FedEx Address Checker

1. Enter as much information of the address as possible and click **Check**.
2. **Error/Messages** will return the status of the address validation request, if it was completed or if an error was detected.
3. The **Suggested** message box will give you the address results as returned by FedEx Web Services. Any suggested edits to your original entered address will be in bold purple font.

FEDEX LOCATOR

FedEx Locator is a quick solution for finding FedEx locations.

- Search based on ZIP code or city and state.
- Filter results so that the best matches are displayed.
- Click the **Map** link to view a local map of the address.

Using the FedEx Locator

1. Enter as much information about the area to be searched as possible.
2. You may filter your search results by checking the appropriate boxes and entering a **Search Radius**.
3. Click **Search**.
4. FedEx Automation Toolbox will display the results of your search in a data grid.

Printing and Exporting FedEx Locator Results

You can print and export the FedEx Locator results:

- To print the FedEx Locator results, click **Print**.
- To export the FedEx Locator results, click **Export**. Clicking this button starts the Export Wizard, which lets you export the Locator results to an XLS or comma-separated values text file. For more information on using the Export Wizard, see **Appendix A**.

APPLICATION CONFIGURATION

The Toolbox Application Configuration allows users to customize the Toolbox experience and perform various tasks.

Toolbox Backup

To back up Toolbox:

1. Select **File > Application Configuration > Toolbox Backup**. The following window appears.

Backup Path [\[Select Folder\]](#)

Selected List Global ▼

Client ☐ All

☐ Database ☐ Export Mappings ☐ Import Mappings

☐ Print Mappings

Database ☐ All

☐ Address Book ☐ Brokers ☐ Commodities
☐ Freight Line Items ☐ FSMS Server ☐ Haz Mat
☐ Images ☐ Importer Of Record ☐ Packages
☐ Product Code ☐ References ☐ Senders
☐ Setting File ☐ Settings ☐ Smartpost
☐ Third Party ☐ User Profiles ☐ Web Services Account

Integration ☐ All

☐ Batch Mappings ☐ Data Sources ☐ Integration Mappings

☐ Text Translations C# Scripts ☐ Saved Text Translations

Log Configuration ☐ All

☐ Logging Settings

Cancel Backup

2. Enter the path for the folder where you want to store the backup files or click **Select Folder** to navigate to the folder.
3. Select the items to back up by checking the appropriate box.
Note: Toolbox Client Database must be backed up separately from other items.
4. Click **Backup** to start the backup.

Toolbox Restore

Warning: Restoring a database will overwrite any existing files.

To restore Toolbox:

1. Select **File > Application Configuration > Toolbox Restore**. The following window displays.

2. Select the items to restore by checking the appropriate box.
3. Enter the path for the folder where the backup files are located or click **Select Folder** to navigate to the folder.
4. Click **Restore** to start the restore process.

User Profiles

Toolbox User Profiles are used to set defaults for certain fields for faster processing. The **Basic User Profile** has settings for commonly used features while the **Advanced User Profile** will allow for advanced customization.

Note: Basic and Advanced refers to how the User Profiles are configured, they are not separate profiles.

Basic User Profile

1. To create a User Profile, go to **File > Application Configuration > Basic User Profile**.
2. Choose the profile from the **Select Profile to Edit** dropdown.
Note: The **Advanced** link will navigate to the Advanced User Profile configuration
3. Navigate through the available tabs to set defaults.
4. On the **Startup Items** tab, add any modules that should automatically start when Toolbox is started.

Advanced User Profile

1. To create a User Profile, go to **File > Application Configuration > Advanced User Profile**.
2. Choose to edit the *Default* User Profile or click **Add** to create a new one.
3. Enter a **Profile Name** and click **Add**.
4. Navigate through the available tabs to set defaults. To set a default behavior, select **Default** from the Behavior column, and select the **Value** in the Value column.
5. After setting all default behaviors, click **Save**.
6. User Profiles can be accessed from the Rates and Transit Times or Tracking module by selecting the desired profile from the **User Profile** drop-down menu. Selecting the profile will activate the default settings.

Create Toolbox Installer

Create Toolbox Installer creates an installation package that clones the existing Toolbox client, copying the accounts, and other configuration settings. Once created, the installer can be run on another PC and will install an exact copy of Toolbox, as it existed on the system when the installer was created. The cloned installation can be customized, as needed.

1. To use Create Toolbox Installer, go to **File > Application Configuration > Create Toolbox Installer**.
2. You can change the Installer Path by clicking the **Select** link or accept the default path.
3. Click **Create**.
4. Building the installer takes a few minutes. Once the process is complete, click **Close**.
5. Click **Cancel** or close the Create Toolbox Installer window to return to Toolbox.
6. The installation package will be saved to the folder that you specified as `ToolboxCustomInstaller_date.msi`. To install Toolbox on additional PCs, execute the msi file with full permissions.

Note: The **Advanced** options allows for the configuration of a custom installation path on the cloned installation PC. Normally, the default installation path would be used.

DATABASES

FedEx Automation Toolbox has databases for your use to store information for quick retrieval when using Rating or Tracking features.

Address Book

To access the Address Book, select **Databases > Address Book**.

Add

To manually add a new entry into the Address Book, select the **Address Type** and click the **Add** button. Fill in ID and required fields in bold and click **Add** to save the record in the Address Book.

Edit

Edit an existing record in the Address Book by clicking on the **Edit** icon.

Clone

The **Clone** option will copy the existing record and will allow you to overwrite and save the new entry with a new unique Address ID.

Delete

Delete existing records from the Address Book by clicking on the **Delete** icon.

Import and Export

For more information on Imports and Exports, see [Appendix A](#).

Purge

To clean-up the Address database, use the Purge functionality. Instructions on how to purge are provided, when the **Purge** button is clicked.

Packages

The Boxes database contains box dimensions and weights for easy rating. To access the Boxes database, select **Databases > Packages**.

Entering Boxes Manually

Use the **Edit Package** form, to enter package details manually.

1. Enter a unique **ID**
2. Enter required values for **Dimensions (Length, Width, and Height)**, and select the dimension unit of measurement from the drop-down menu.
3. Enter optional values, as needed
4. Click **Add**.

Import and Export

For more information on Imports and Exports, see [Appendix A](#).

Third-Party Accounts

Use the Third-Party Accounts database to store third-party account numbers for easy tracking by reference.

To access the Third-Party Account Numbers database, select **Databases > Third-Party Accounts**. Account numbers can be entered manually or imported from a file of account information.

Entering Account Numbers Manually

1. Enter a unique ID in the **ID** field and the account number in the **Account Number** field.
2. Enter any additional information about the account.
3. Click **Add**.

Import and Export

For more information on Imports and Exports, see [Appendix A](#).

Commodities

Use the Commodities database to store commodity information, which can be used to obtain estimated duties and taxes in your international rate quotes.

To access the Commodities database, select **Databases > Commodities**. The screen that appears lets you enter the commodities manually or import a file of commodities.

Entering Commodities Manually

To manually add a new entry into the Commodity database, fill in the **Commodity ID** and required fields in bold and click **Add** to save the record in the Commodity database.

Import and Export

For more information on Imports and Exports, see [Appendix A](#).

GETTING SUPPORT

Technical Support

For technical support, call the toll-free number **1.877.339.2774** and say “**web services**” at the prompt.

Note: Before calling, please have your FedEx 9-digit account number available.

Questions Regarding Rates

For questions regarding rates, contact your FedEx account executive.

Updating FedEx Automation Toolbox Software

Automatic Updates

At startup, FedEx Automation Toolbox checks the download site to see if a newer version is available. If a newer version is available, you are prompted to download it.

Manual Updates

To manually update FedEx Automation Toolbox, go to:

File > Application Configuration > Application Update.

APPENDIX A: IMPORTS AND EXPORTS

Databases in FedEx Automation Toolbox contain **Import** and **Export** buttons. Clicking these buttons start the Import or Export Wizard.

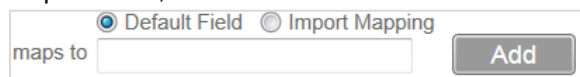
Note: Many Toolbox modules and databases now allow for **Export All Excel** and **Export All CSV**. This feature will export all the fields available for that feature by simply clicking the button and choosing a path to save the file. It is not necessary to create a Mapping Template to Export All.

Creating a Mapping Template

Import Templates

Imports require an import mapping template to be created first. To create a template:

1. Click the **Import** button. The Import Wizard will open; click **Create New** to create a new template.
2. Enter a **Name** for the import map and select the Import Type. **Simple** supports Excel or delimited files; **Advanced** allows import from all installed data providers with advanced formatting features. The following instructions will walk you through a **Simple** import map. Click ➡ to continue.
3. Click the **Select File** link to browse to your import file. If using an Excel spreadsheet, you may select the specific worksheet. For delimited files you can select the **Delimiter** and text **Qualifier** type.
Note: Special characters in column headings may cause issues with mapping. Remove any special characters from the column heading prior to mapping your file.
4. Click ➡ to continue.
5. Toolbox's available fields are in the left drop-down menu; your file's fields are on the right drop-down menu. Required fields are listed in bold. Select the Toolbox field and the corresponding field from your file and click **Add**.
Note: If the right drop-down-menu does not contain a list of available fields, it is likely the file Delimiter and/or Qualifier are not configured correctly. Return to Step 3 to configure.
6. For fields that need a default value, select the **Default Field** radio button, enter a value in the maps to field, and click **Add**.



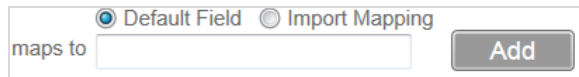
The screenshot shows a user interface for mapping fields. At the top, there are two radio buttons: "Default Field" (which is selected) and "Import Mapping". Below these is a text input field with the placeholder text "maps to". To the right of the input field is a button labeled "Add".

7. After mapping all fields, click **Save**.

Export Templates

To create an export mapping template:

1. Click the **Export** button. The Export Wizard will open; click **Create New** to create a new template.
2. Enter a **Name** for the export map and select the Export Type. **Simple** supports Excel or delimited files; **Advanced** allows export from all installed data providers with advanced formatting features. The following instructions will walk you through a **Simple** export map. Click ➡ to continue.
3. Click the **Select File** link to browse to your export file. For delimited files you can select the **Delimiter** and text **Qualifier** type. Click ➡ to continue.
Note: Special characters in column headings may cause issues with mapping. Remove any special characters from the column heading prior to mapping your file.
4. Toolbox's available fields are in the left drop-down menu; your file's fields are on the right drop-down menu. Select the Toolbox field and the corresponding field from your file and click **Add**.
Note: If the right drop-down-menu does not contain a list of available fields, it is likely the file Delimiter and/or Qualifier are not configured correctly. Return to Step 3 to configure.
5. For fields that need a default value, select the **Default Field** radio button and enter a value in the Maps to field and click **Add**.



6. After mapping all fields, click **Save**.

Import

1. Click the **Import** button. The Import Wizard will open; click **Run** icon of the template you would like to run.
2. Select the Import Owner, if other than Global, and click **Import**.
3. Browse and navigate to the file to import and click **Open**.
4. You have the option of purging existing records in the database. Click **Yes** to purge and erase existing records in the database or click **No** to append records to the database.
5. The Import Results will display, providing information on the number of records read, imported, and errors. Click **Close**.

Export

To export to a comma-delimited or Excel file:

1. Click the **Export** button; the Export Wizard will open. Click on the **Run** icon of the template you would like to run or export all fields and records to Excel or CSV by clicking on **Export All Excel** or **Export all CSV**.
2. Browse and enter a filename to save the export, Toolbox defaults the filename as export.xls or export.csv and click **Save**.

APPENDIX B: BATCH PROFILES

FedEx Automation Toolbox can batch process Rating, Time in Transit, and Tracking requests. To batch process, you must first create a batch profile.

1. Select **Batch Process** from the drop-down menu in the Tracking module or click the **Batch Tab** in Rates and Transit Times module.
2. Click on **Batch Profiles**.
3. Click **Create New** to create a batch profile.
4. Enter a **Name** for the batch profile and click **Create**.
5. Select the **Mapping Type** and click **Create New**.
6. Select the **Import Type**. **Simple** imports support delimited files and Excel spreadsheets; **Advanced** supports all install data providers with advanced formatting features; **Defaults Only** does not import data and lets you set defaults for all fields instead. The following instructions will walk you through a Simple import.
7. Enter a mapping **Description**.
8. Click ➡ to continue.
9. Click the **Select File** link to browse to your import file. If using an Excel spreadsheet, you may select the specific worksheet. For delimited files you can select the **Delimiter** and text **Qualifier** type.

Note: Special characters in column headings may cause issues with mapping. Remove any special characters from the column heading prior to mapping your file.

10. Click **Load File** to view how the file will be imported. Click ➡ to continue.
11. The **User Entry Items** tab is used to set a custom lookup field if more than one field is required to query the import file or database. Click on **Add Custom Field** to add the fields to capture. If this is not required, click ➡ to bypass to the Mappings tab.
12. Fields from your file or database will appear on the left side drop-down menu; available Toolbox fields will be on the right drop-down menu. Select your field and the corresponding Toolbox field to map and click **Add**.
13. For fields that need a default value, select the **Default Field** radio button, enter a value in the maps to field, and click **Add**.

The screenshot shows a form with two radio buttons: 'Default Field' (selected) and 'Import Mapping'. Below the radio buttons is a text input field labeled 'maps to' and an 'Add' button.

14. After mapping all fields, click **Save** to save your batch profile.

Mapping Types

Rates and Transit Times

- **Rate Single Service** – Batch process rate quotes based on one specific service type.
- **Rate All Services** – Batch process rate quotes based on all available service types for either small-package or freight LTL.
- **Transit Time** – Calculate the transit time for a shipment based on origin and destination ZIP codes.
- **Rate All Small Pkg & LTL** – Batch process rate quotes for all services for small-package and freight LTL.

Tracking

- **Track by Tracking Number** – Batch process tracking requests based on the tracking number.
- **Track by Reference Number** – Batch process tracking requests based on the given reference.
- **Track and SPOD Download** – Batch process tracking requests with Signature Proof of Delivery downloaded as pdfs.
- **Shipment Notification** – Batch process shipment notification requests.
- **Tracking / SPOD Export** – Template map to export tracking and Signature Proof of Delivery results.
- **Shipment Notification Export** – Template map to export Shipment Notification results.

Required Fields

Below are the minimum required fields for each batch mapping type.

Note: For Rates, it is recommended to add as much information about the shipment as possible in order to receive the most accurate rate quote.

Rate Single Service

- Shipment > Recipient > Zip
- Shipment > Recipient > Country
- Shipment > Packages > Weight
- Shipment > Sender > Zip *(if different from the sender ZIP code configured for the account)*
- Shipment > Sender > Country *(if different from the sender country configured for the account)*
- Shipment > Service Type

Rate All Services

- Shipment > Recipient > Zip
- Shipment > Recipient > Country
- Shipment > Packages > Weight
- Shipment > Sender > Zip *(if different from the sender ZIP code configured for the account)*
- Shipment > Sender > Country *(if different from the sender country configured for the account)*

Transit Time

- Shipment > Recipient > Zip
- Shipment > Recipient > Country
- Shipment > Sender > Zip *(if different from the sender ZIP code configured for the account)*
- Shipment > Sender > Country *(if different from the sender country configured for the account)*

Select which Service Types to display in the Transit Time Results:

- Display Service Types > Display Ground *(default to 'Yes')*
- Display Service Types > Display Domestic Express *(default to 'Yes')*
- Display Service Types > Display Domestic Express Freight *(default to 'Yes')*
- Display Service Types > Display Home Delivery *(default to 'Yes')*
- Display Service Types > Display International Express *(default to 'Yes')*
- Display Service Types > Display International Express Freight *(default to 'Yes')*
- Display Service Types > Display LTL Freight *(default to 'Yes')*
- Display Service Types > Display SmartPost *(default to 'Yes')*

Rate All Small Pkg & LTL

- Shipment > Recipient > Zip
- Shipment > Recipient > Country
- Shipment > Packages > Weight
- Shipment > Sender > Zip *(if different from the sender ZIP code configured for the account)*
- Shipment > Sender > Country *(if different from the sender country configured for the account)*
- Shipment > LTL Freight > LTL Line Items > Weight
- Shipment > LTL Freight > LTL Line Items > LTL Packaging
- Shipment > LTL Freight > LTL Line Items > LTL Number of Packages
- Shipment > LTL Freight > LTL Line Items > NMFC Class
- Shipment > LTL Freight > LTL Freight Payor Role Type
- Shipment > LTL Freight > LTL Payment Type
- Display Service Types > Display Domestic Express *(default to 'Yes')*
- Display Service Types > Display Ground *(default to 'Yes')*

Track by Tracking Number

- Tracking Number
- Scan Details *(not required; passing 'True' will return profile and detailed scan activity; passing 'False' or excluding this field will return summary tracking information)*

Track by Reference Number

- Reference
- Estimated Ship Date
- Search Day Range

Tracking by Reference requires the above information to be sent with a combination of either:

- Destination Country/Territory Code
- Destination Postal Code
- or
- Account Number

Track and SPOD Download

- Tracking Number

Shipment Notification

- Tracking Number
- Recipient > Address
- Recipient > Delivery Notification *(default to 'Yes')*
- Sender Name
- Sender Email

APPENDIX C: FREQUENTLY ASKED QUESTIONS

FedEx Address Checker

Does the address checker support batch?

FedEx Automation Toolbox has a separate module for Batch Address Checker and requires a FedEx Customer Technical Consultant to enable it. Contact your assigned FedEx representative to inquire about the Batch Address Checker.

Installation and Upgrade

Are administrator rights needed to load FedEx Automation Toolbox?

Administrator rights are needed to install FedEx Automation Toolbox so that folders can be created in the file system. After the application has been configured, it should not require administrator rights. If you need to change settings after the initial install, you may need administrator rights to the folder where FedEx Automation Toolbox was installed.

Can FedEx Automation Toolbox be installed on Macs?

FedEx Automation Toolbox is supported for Windows OS only.

Can I copy FedEx Automation Toolbox on other PCs with the same settings?

Yes, you can use the Mass Installer to install Toolbox on additional PCs. This will clone the existing Toolbox installation, copying the account, and configuration settings.

What are the minimum requirements for FedEx Automation Toolbox?

The recommended hardware requirements for Toolbox include:

- Dual core processor.
- 2GB of RAM minimum.
- High-speed internet.
- 50 – 150MB of hard drive space.

Toolbox installation requires the following:

- You must be logged into the PC with Admin rights.
- Microsoft .NET Framework (latest version).
- Latest Windows updates.

How are the version updates handled?

Currently, FedEx Automation Toolbox uses automatic updates. When an update is available, FedEx Automation Toolbox displays a message that an update is available, and you are prompted to download it. You may also update Toolbox manually by going to:

File > Application Configuration > Application Update.

Rates

Why are incorrect rates showing in FedEx Automation Toolbox?

Rates are returned by FedEx Web Services and displayed by Toolbox. Toolbox does no manipulation to the rate unless a handling charge is configured in Toolbox. If you think your rates are incorrect, contact your FedEx account executive.

Which rating features does FedEx Automation Toolbox support?

FedEx Automation Toolbox supports the following rating features:

- FedEx Express
- FedEx Ground
- FedEx Freight
- FedEx SmartPost®
- Rates for international shipments, both list and discounted rates
- FedEx Freight Volume Services or Freight Spot Quote
- FedEx Freight Box

Support

Who do I call for support?

For technical support, call **1.877.339.2774**. At the voice prompt say, “**web services**.” Your call will be routed to the Web Integrations Solutions group. For help with integration or information regarding product codes, contact your assigned Customer Technical Consultant (CTC). For questions on your rates, contact your FedEx account executive.

APPENDIX D: MICROSOFT .NET FRAMEWORK

Microsoft .NET Framework is required for the installation of FedEx Automation Toolbox. If Microsoft .NET Framework is not already installed, the FedEx Automation Toolbox installation program prompts you to install it.

To install Microsoft .NET Framework, you must have administrator rights on the computer where you are installing the software.

Note: It is recommended that the latest version of Microsoft .NET Framework is installed. The minimum version required is 4.5.2.

To check whether Microsoft .NET Framework is installed:

1. Open **Control Panel**.
2. Select **Programs and Features**. Check if Microsoft .NET Framework 4.5.2 or higher is installed.

APPENDIX E: LINK PROFILES

Note: For integration support with Toolbox and Link, contact your assigned Customer Technical Consultant.

FedEx Automation Toolbox allows integration into the Rate and Transit Time screen. Integration lets you connect to a data source so that you can automatically populate the Toolbox screen with values.

A Link profile contains information about what is required to integrate successfully. It is important to gather information for the mapping before starting the integration process.

To create a Link profile:

1. Go to **Modules** and select **Link** from the menu bar.
2. Click **Create New** to create a Link profile.
3. Enter a **Name** for the batch profile and click **Create**.
4. Click on the **Rating Import on Integration ID lost cursor** event. This should open the **Welcome** tab in **Editing Mapping: Rating**.
5. Select the **Import Type**.
 - a. **Simple** - imports support delimited files and Excel spreadsheets.
 - b. **Advanced** - supports all install data providers with advanced formatting features.
 - c. **Defaults Only** - does not import data and lets you set defaults for all fields instead.

The following instructions will walk you through a **Simple** import from an Excel spreadsheet:

6. Enter a mapping **Description**.
7. Check the appropriate options:
 - a. Select the records you wish to process prior to import.
 - b. Return first record if multiple exist.
 - c. Display "Please Wait" on database actions.
 - d. Display record not found message to user.
8. Click ➡ to continue.
9. Click the **Select File** link to browse to your import file. If using an Excel spreadsheet, you may select the specific worksheet. For delimited files you can select the **Delimiter** and **Text Qualifier** type.

Note: Special characters in column headings may cause issues with mapping. Remove any special characters from the column heading prior to mapping your file.
10. Click **Load File** to view how the file will be imported. Click ➡ to continue.
11. The **User Entry Items** tab is used to set the **Integration ID** lookup key to query the import file or database. Click on **Add Custom Field** to add the field to capture. Choose the **Field Type** and the field from your file or database from the **Data Source Column** drop-down. Check the **Integration Lookup Field** box and click **Update**. Click ➡ to continue.
12. Fields from your file or database will appear on the left drop-down menu, available Toolbox fields will be on the right drop-down menu. Select your field and the corresponding Toolbox field to map and click **Add**.
13. For fields that need a default value, select the **Default Field** radio button, enter a value in the maps to field, and click **Add**.

The screenshot shows a dialog box with two radio buttons at the top: 'Default Field' (which is selected) and 'Import Mapping'. Below these is a text input field with the placeholder text 'maps to'. To the right of the input field is a button labeled 'Add'.

14. After mapping all fields, click **Save** to save your Link profile.
15. To start using your Link Integration Profile, select the profile from the **Integration** drop-down at the top of the Toolbox menu bar.