# Managing a FedEx Shipping Label within SoftPro 360

In order to maintain a streamlined closing process, save time and be more efficient, SoftPro 360 users now have the ability to prepare FedEx shipment labels directly from ProForm. The SoftPro Shipping Service seamlessly populates the name, address and phone number of the contacts in your ProForm order, allowing you to quickly select a contact and create a FedEx Shipping Label without ever leaving ProForm.

FedEx Shipping can be found in the SoftPro 360 Services menu under the Service titled Shipping. Double click on the FedEx Shipping service to start creating your FedEx shipping labels (or highlight FedEx Shipping and click Submit).
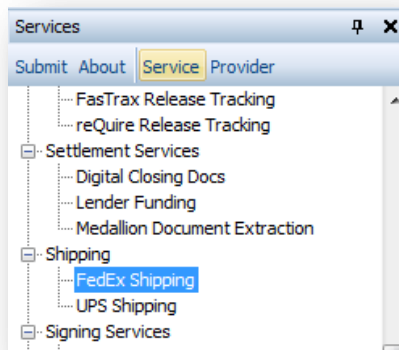
If you already have ProForm order(s) open, they will be listed in the Order Linking dialog. The active order will be highlighted and entered in the Selected Order Number field. You have the ability to select from any of the open orders, or you may choose to overwrite the Selected Order Number with an order that is not currently open. Once you have confirmed the order to link, click OK to continue.
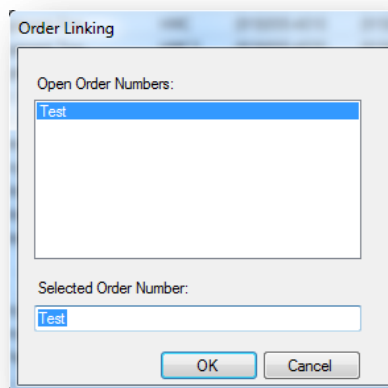
The first time you access FedEx Shipping you will be taken to the Shipping Preferences screen. Your contact information will be pre-populated based upon your SoftPro 360 registration.

On this screen you have the option to set defaults for Delivery Confirmation, Address Validation, Ship Notification, Delivery Notification, Tendered Notification and Exception Notification. Enabling these settings here will set them as default for all users and for all labels created, however, you can modify the setting on a per label basis as needed.

- Delivery Confirmation options are Delivery without Signature, Indirect Signature Required, Direct Signature Required, Adult Signature Required and Service Default
- Address Validation: Address Validation is an automatic function that verifies the city, state and postal code combination of any U.S. Ship To address. If FedEx is unable to validate the combination, you will have the option to use a suggested address from an address database, revise the original address, or use the original address.
- Ship Notification: A Ship notification indicates that the shipment information has been sent to FedEx
- Delivery Notification: A Delivery notification indicates when the shipment has been delivered
- Tendered Notification: A Tendered notification indicates when FedEx has picked up a shipment
- Exception Notification: An Exception notification indicates any exceptions that may cause a delivery delay

Note: You can get back to this screen by clicking the Change Shipping Preferences link on the Manage Accounts screen

If no shared accounts exist, on the Add Account screen you will need to enter your FedEx Account Number and choose a FedEx Account Name. The Shared Account option allows users using the same SoftPro license to access the same FedEx Account through the FedEx Shipping product.

The Contact Information tab must match the address listed with FedEx for the account number. By checking the Same as Shipping Address checkbox, the information from the Shipping Preferences screen will populate in the given fields.

Note: You can add additional FedEx Accounts by accessing the Add Account hyperlink found on the Manage Accounts screen

For subsequent uses of FedEx Shipping when a shared account already exists, the Manage Transactions screen will be the first screen displayed. The Manage Transactions screen will display all shipments created for the linked ProForm order. To create a shipping label, click the Add Shipment button.

Note: Click the Manage Accounts button on the Manage Transactions screen to add additional FedEx Accounts, view current FedEx Accounts and Change Shipping Preferences. Click the Transactions button on the Manage Accounts screen to access the Manage Transactions screen.
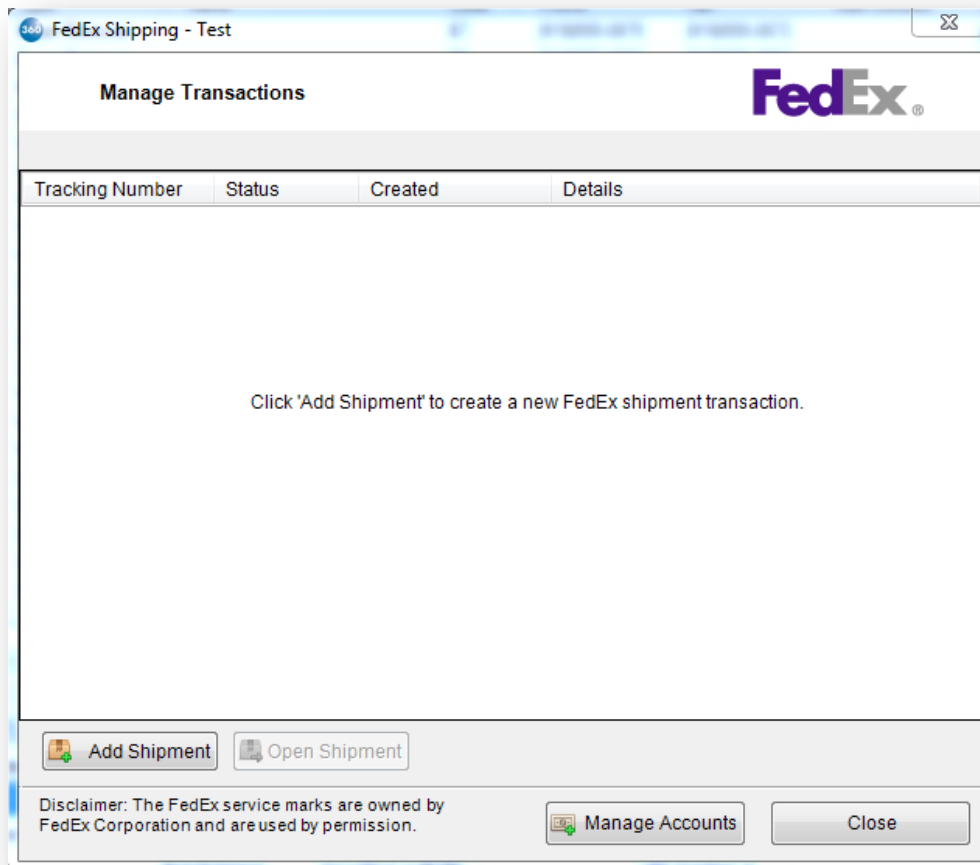
The Create Shipment screen lists the contacts entered into the linked ProForm order. Highlight the contact you would like to ship to and (when entered into the ProForm order) the contact's name, address and phone number will populate into the appropriate fields.

If additional FedEx Accounts have been added, they will be available under the Account No. drop down list. You have the option to select the Package Type, enter the package Weight and select the Service Type. You can also select the options of Residential Delivery, Validate Address or create a Return Label. The Compare Rates link will provide estimated rates for the package type selected.

The More Options link provides additional options that can be selected on a per shipment basis.

- Additional Service Options – Ship Date, Saturday Pickup and Saturday Delivery
- Drop Off options are –
  - Business Service Center: The shipper will drop off the package at an authorized FedEx business service center
  - Drop Box: The shipper will drop the package in a FedEx drop box
  - Regular Pickup: The shipper already has an every-day pickup scheduled with a courier
  - Request Courier: The shipper will call FedEx to ask for a courier
  - Station: The shipper will drop off the package at a FedEx station

- Delivery Confirmation options are Deliver without Signature, Indirect Signature Required, Direct Signature Required, Adult Signature Required and Service Default
- Special Instructions: A free form field used to provide specific delivery instructions to the FedEx Ground courier
- Package Dimensions: Length, Width, Height
- Declared Value
- Ship Notification: A Ship notification indicates that the shipment information has been sent to FedEx (if entered into the ProForm order for the contact, the contact's email address will flow to the Email field)
- Delivery Notification: A Delivery notification indicates when the shipment has been delivered (if entered into the ProForm order for the contact, the contact's email address will flow to the Email field)
- Tendered Notification: A Tendered notification indicates when FedEx has picked up a shipment (if entered into the ProForm order for the contact, the contact's email address will flow to the Email field)
- Exception Notification: An Exception notification indicates any exceptions that may cause a delivery delay (if entered into the ProForm order for the contact, the contact's email address will flow to the Email field)

Note: value-added service charges may apply

To create a Return Label, highlight the Contact the package will be shipped from and check the Return Label checkbox. This feature changes the Ship To field to Ship From. Click Submit.

On the Shipment Details screen you can preview, print or cancel your FedEx shipping label. To track the shipment click the Track hyperlink, which will take you to the FedEx tracking website

Click Close to close this window and return to the Manage Transactions screen.

After you have created the shipment, you will return to the Manage Transactions screen. The screen will now display a tracking number hyperlink for the shipment. Click the Tracking Number to link to the FedEx tracking website. The Status will update to Completed once the package has been delivered. The Open Shipment button will take you back to the Shipment Details screen. The Open Shipment button is only enabled when the status of the transaction is In Progress.
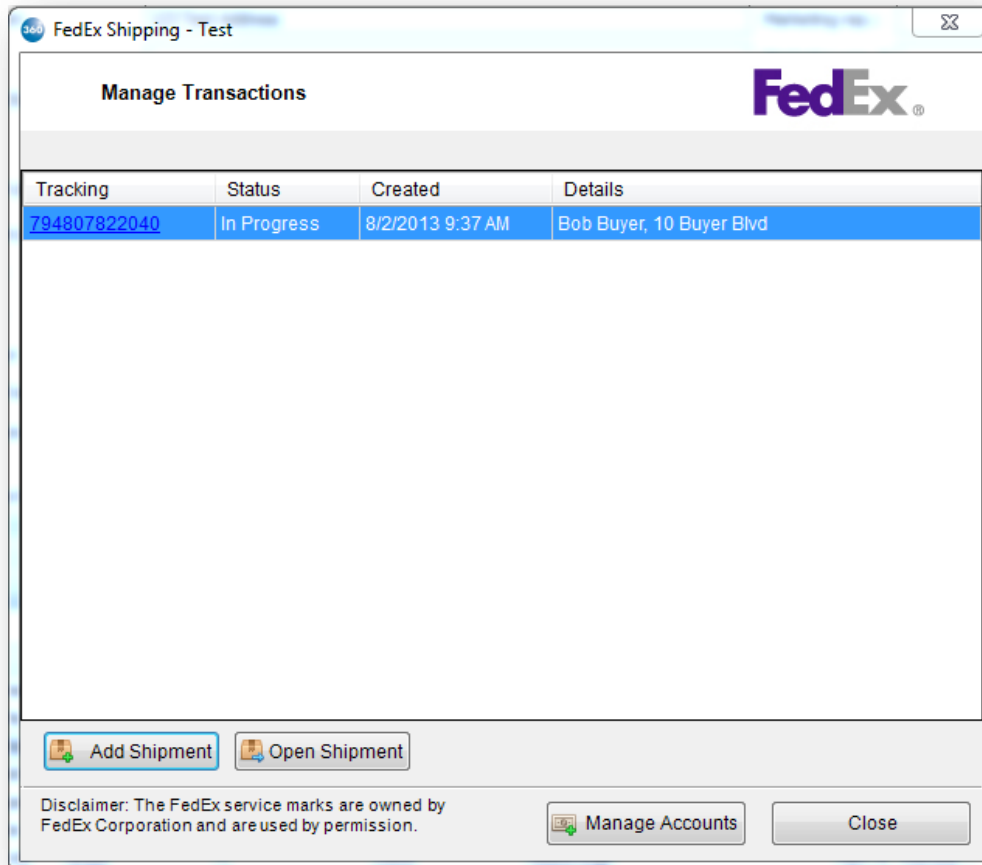
Your SoftPro 360 queue will update with a Transaction for the shipment and the FedEx tracking number will be available as a hyperlink under the Description column. The link will take you to the FedEx tracking website. The Status will also update to Completed once the package has been delivered.
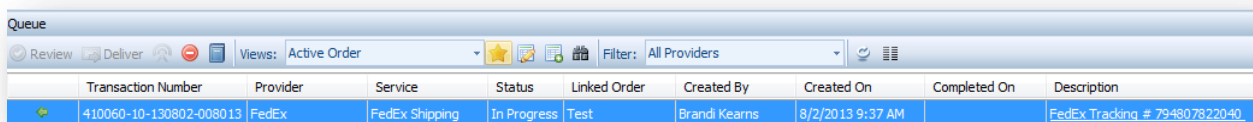
Adding FedEx Accounts

Select the Manage Accounts button on the Manage Transactions screen to add additional FedEx Accounts, view current FedEx Accounts and Change Shipping Preferences. To add an Additional FedEx Account click the Add Account link, enter the FedEx Account Number and Account Name. Select Shared if the account should be available to all users. Complete the Contact Information tab, and then click Register.
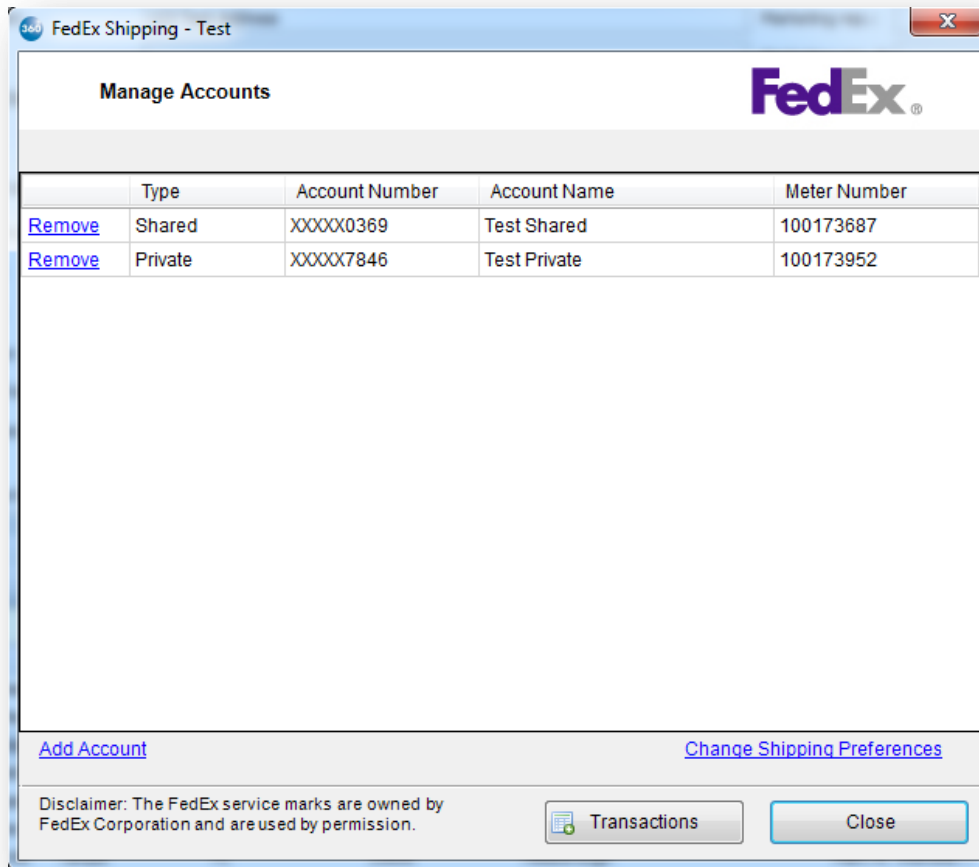
Removing FedEx Accounts

To remove FedEx Accounts, select the Manage Accounts button on the Manage Transactions screen. Click the Remove hyperlink next to the account to be removed. When a Shared account is removed, the account will be unavailable to all users using the same SoftPro license. Removing a Private account will remove the account only for that user.