

FedEx Shipping User Guide

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Table of Contents

History..... 4

Introduction 4

Opening the FedEx Integration 4

Adding Accounts 5

Managing Accounts..... 6

Shipping Preferences 6

Managing Transactions 8

Creating Shipment 8

More Options Screen 9

Shipment Details Screen 11

SoftPro 360 Queue 12

History

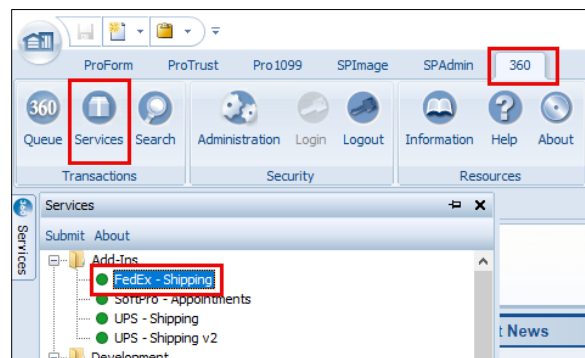
Date	Details
04/2025	Initial User Guide

Introduction

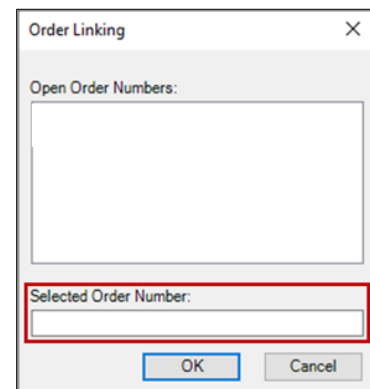
SoftPro 360 users can prepare FedEx shipment labels directly from ProForm to maintain a streamlined closing process, save time and be more efficient. The SoftPro Shipping Service seamlessly populates the name, address and phone number of the contacts in your ProForm order, allowing you to quickly select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

Opening the FedEx Integration

1. Select the **Services** tab
2. Click the **Add--Ins** folder to expand
3. Double-click **FedEx - Shipping**



4. From the **Order Linking** window
 - If no order is open, enter the corresponding order in the **Selected Order Number** field



- If a single order is open, the order number is shown in the **Open Order Numbers** field and the **Selected Order Number**

NOTE: The **Selected Order Number** field can be overwritten with an order that is not open.

The screenshot shows the 'Order Linking' dialog box. Under 'Open Order Numbers:', the number '2025020144' is listed and highlighted with a blue selection bar. A red box highlights this number, and an arrow points from a text box stating 'Order number is automatically populated as Selected Order Number' to the 'Selected Order Number:' field, which also contains '2025020144'. The 'OK' and 'Cancel' buttons are at the bottom.

- If multiple orders are open, all order numbers appear in the **Open Order Numbers** field and the first order is displayed in the **Selected Order Number** field. Highlight an order in the **Open Order Numbers** field to select the applicable order

5. Press the **OK** button to continue

The screenshot shows the 'Order Linking' dialog box with two order numbers in the 'Open Order Numbers:' list: '2025020144' and '20220000107'. The first number is highlighted with a blue selection bar. A red box highlights this number, and an arrow points from a text box stating 'First order number is automatically populated as the Selected Order Number' to the 'Selected Order Number:' field, which contains '2025020144'. The 'OK' and 'Cancel' buttons are at the bottom.

Adding Accounts

If you are not already logged in to a FedEx account, the Add Account screen will be displayed. Here, 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. If the account is to be used as the primary or default account, the user can check the Default Account option. Only one account can be assigned as the default account.

The Contact Information tab must match the address listed with FedEx for the account number. By checking

The screenshot shows the 'FedEx Shipping - 2025040007' window with the 'Add Account' tab selected. It includes fields for 'FedEx Account Number' and 'FedEx Account Name', each with a red asterisk indicating a required field. There are checkboxes for 'Shared Account' and 'Default Account'. Below is the 'Contact Information' section with fields for Name, Company, Street, City/State/Zip, Phone, and Email. A checkbox 'Same as Shipping Address' is checked. A note at the bottom states: '* This address (State and Zip) must match the address listed with FedEx for this account number.' The 'Register' and 'Cancel' buttons are at the bottom right.

the Same as Shipping Address checkbox, the information from the Shipping Preferences screen will populate in the given fields.

Managing Accounts

The Manage Accounts screen allows users to add additional FedEx Accounts, view or remove current FedEx Accounts, and Change Shipping Preferences. This is also where an account can be designated as the default.

Clicking the Transactions button on this screen allows users to view the Manage Transaction screen.

The user can add additional FedEx Accounts by accessing the Add Account hyperlink found on the Manage Accounts screen

	Type	Account Number	Account Name	Meter Number	Default Account
Remove	Shared	XXXXX7846	gg	259538...	<input type="checkbox"/>
Remove	Private	XXXXX0369	Matt Berg	259510...	<input type="checkbox"/>

[Add Account](#) [Change Shipping Preferences](#)

FedEx service marks used by permission. [Transactions](#) [Close](#)

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.

Shipping Preferences

On this screen you have the option to set defaults for Shipper Information and Shipping Default Preferences. Filling in this information and enabling these settings will set them as a default for all users and for all labels created. However, you can modify the setting on a per label basis as needed.

Data elements on this screen are:

- **Shipper Information**

- Name
- Company
- Address
- City / State / Zip
- Phone
- Email

- **Shipping Default Preferences**

- Delivery Options
 - Deliver without Signature
 - Indirect Signature Required
 - Direct Signature Required
 - Adult Signature Required
 - Service Default
- Service Type
 - FedEx First Overnight
 - FedEx Priority Overnight
 - FedEx Standard Overnight
 - FedEx 2 Day
 - FedEx 2 Day A.M.
 - FedEx Express Saver
 - FedEx Ground
 - FedEx Home Delivery
 - FedEx 2 Day Freight
- Shipment Weight
- Address Validation
 - Validate Addresses
- Email Notification

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

** In certain cases, the email address in the Shipping Preferences screen may be defaulted to a specific customer. This is not usual behavior and is specific to certain customers.

Press the Save button when the desired entries have been made. Note: You can get back to this screen by clicking the Change Shipping Preferences link on the Manage Accounts screen

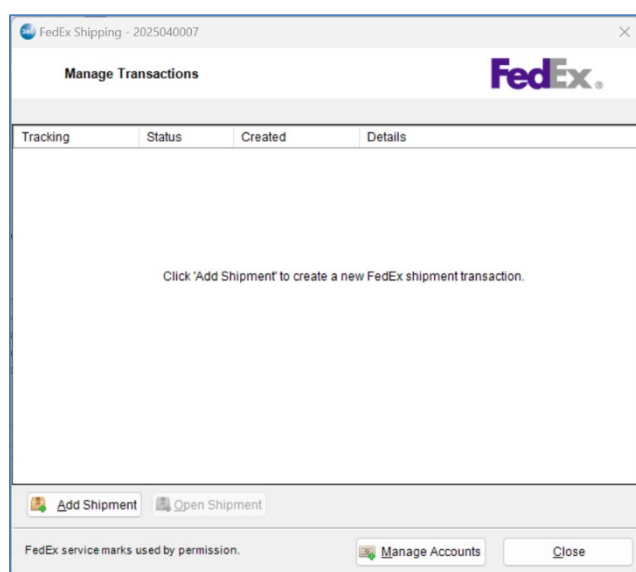
Managing Transactions

For subsequent uses of FedEx Shipping when a shared account already exists, the **Manage Transactions** screen is the first screen displayed.

The **Manage Transactions** screen displays all shipments created for the linked ProForm order.

To create a shipping label, click the **Add Shipment** button.

NOTE: Click the **Manage Accounts** button to open the **Manage Accounts** screen.



Creating Shipment

The Create Shipment screen lists the contacts entered into the linked ProForm order.

A ProForm order containing a single contact populates the contact's name, address and phone number in the appropriate fields on this screen.

If, however, the address is not supported by the integration, the address fields are not populated and a message displays, ***No contacts with supported shipping locations exist in the Order.***

ProForm orders containing multiple contacts displays a list of the contacts from which to select the contact you would like to ship to. The contact's name, address and phone number are populated to the appropriate fields on this screen.

If the selected contact has an address that is not supported, the address fields are populated but greyed out and a message displays stating, ***Shipping to this location is not currently supported. Please select another shipping location.***

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.

In addition to the contact information, the data elements are:

- Package Type
- Lb. (weight)
- Service Type
- Compare Rates
- Options

More Options Screen

This link provides additional options and displays a screen with data elements that can be selected on a per shipment basis.

- **Additional Service Options**

- Ship Date
- Saturday Pickup
- Saturday Delivery

- **Drop Off / Delivery / Special Instructions**

- Drop Off
 - 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 Dimension and Values**

- Length
- Width
- Height
- Declared Value

FedEx - More Options

Additional Service Options

Ship Date: 4/22/2025

☐ Saturday Pickup

☐ Saturday Delivery

Drop Off / Delivery / Special Instructions

Drop Off: Regular Pickup

Delivery Confirmation: Deliver without Signature

Special Instructions:

Package Dimensions and Value

Length	Width	Height	Declared Value:
0	0	0	0

Inches - Valid for "Your Packaging" Only

E-mail Notifications

☐ Ship Notification ☐ Delivery Notification

☐ Tendered Notification ☐ Exception Notification

Email:

Labeling

Ref #: 2025040007

FedEx service marks used by permission. Close

- **Email Notification**

- Ship notification
Indicates that the shipment information has been sent to FedEx (if entered in 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 in 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)
- Email address

- **Labeling**

- Reference #

Clicking the **Close** button returns the user to the **Create Shipment** screen. Clicking the **Submit** button submits the shipment to FedEx.

Shipment Details Screen

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

Data displayed on this screen:

- Shipping From
Name/Address information
- Shipping To
Name/Address information
- Tracking Number
- Shipping Cost
- Estimated Delivery Date

Options include

- View/Open Label

FedEx Shipping - 2025040007

Shipment Details

Shipping From:
Matt Berg
360 Test Organization
4800 Falls of Neuse Rd
Raleigh, NC 27609
(415) 755-5226

Shipping To:
Chris Cornell
Chris Cornell
45 Hawthorne Ave
Larkspur, CA 94939
(415) 755-5226

Tracking Number: 794691537715 [Track](#)

Shipping Cost: \$0.00

Estimated Delivery Date: 4/25/2025

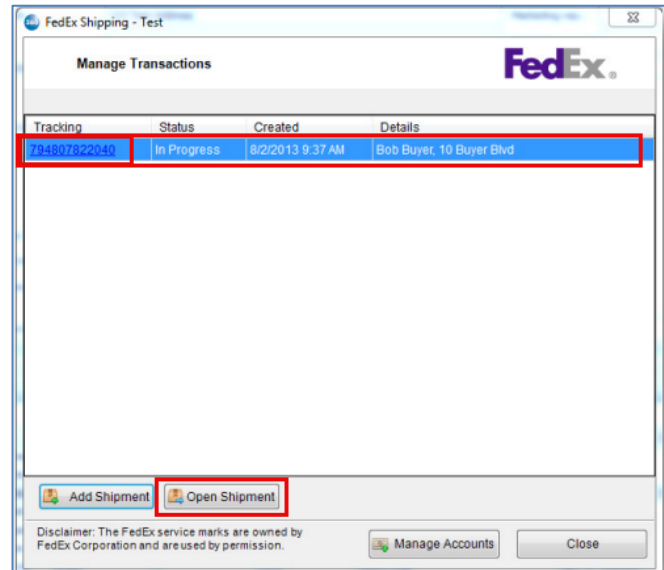
Shipping Label: [View/Open Label](#) [Publish](#) [Cancel Shipment](#)

FedEx service marks used by permission. [Close](#)

- Publish
This button publishes the label to your ProForm order
- Cancel Shipment

Clicking the **Close** button returns you to the **Manage Transactions** screen displaying the current submitted shipment. Click the **Tracking** link to open/view the FedEx Tracking website.

The **Status** updates to **Completed** once the package has been delivered. The **Open Shipment** button takes you back to the **Shipment Details** screen. The **Open Shipment** button is only enabled when the status of the transaction is **In Progress**.



SoftPro 360 Queue

When a shipment has been completed, it will show up as a transaction on the SoftPro 360 queue with the FedEx tracking number as a hyperlink under the Description column. Clicking the link will open the FedEx tracking website. When the package has been delivered, the status will be updated.

Queue									
<div> Review Deliver Views: Active Order Filter: All Providers </div>									
Transaction Number	Provider	Service	Status	Linked Order	Created By	Created On	Completed On	Description	
410060-10-130802-008013	FedEx	FedEx Shipping	In Progress	Test	Brandi Kearns	8/2/2013 9:37 AM		FedEx Tracking # 794807822040	