



FedEx Utility

Deployment and user guide



Contents

Solution overview.....	2
Step 1: Install FedEx Utility from AppSource.....	2
Step 2: FedEx Utility configuration in Dynamics 365 CE	2
Step 2(a): Obtain FedEx Credentials.....	3
Step 3: Create Shipment(s).....	5
Step 3(a): Select Mail Type option.....	5
Step 3(b): Fill up shipment item details in 'Line item' tab.....	5
Step 3(c): Create Single Shipment	6
Step 3(d): Create Multiple Shipment(s)	6
View Recipient Address	7
View Tracking Number & Delivery Status	7
View Shipment Charges	8
View/Print shipping label(s).....	8
Step 4: Shipment Tracking.....	9
Step 4(a): Track Single Shipment.....	9
Step 4(b): Track Multiple Shipments	9
Address auto fill up configuration for shipment creation	10

Solution overview

FedEx utility is a solution built on top of Dynamics 365 CE which seamlessly integrate Dynamics 365 CE with FedEx without any code.

It lets business users create outbound shipments and track incoming shipments right within Dynamics 365 CE.

Users can also create multiple shipments in a single click, auto-calculate shipment charges and print shipment labels from Dynamics 365 CE.

It is easy to configure with associated step by step guide and lets users to bring rich shipment information in customer 360-degree view.

Following are the key features of the solution:

- Provides rich customer 360-degree view of your shipment in customer screen.
- Create and track multiple shipments with a single click of a button.
- Auto calculate outbound shipment charges based on source and destination addresses.
- Print shipment labels to pasted on outbound shipments.
- Invoice customers for created shipments.
- Email notifications on the delivery status of shipments.

Step 1: Install FedEx Utility from AppSource

- Log in to your Dynamics 365 CE instance.
- Search for the app **FedEx Utility** in the [AppSource](#) & select the app created by Woodapple from the search result.
- Click on 'Get it Now' button. Fill out the form & click Continue.
- Select your organization & click Okay in the next Step.
- You will now be able to see the solution in your admin center under manage your solution. In order to go to admin center, follow these steps:
 - Open a new tab in the same browser and type in <https://admin.microsoft.com/AdminPortal/Home#/homepage>
 - Click on 'Show All' option in the left pane.
 - Click on 'All admin centers'.
 - Select 'Dynamics 365' option and then click 'Solutions'.
 - You should see the status of FedEx solution as installed.

Step 2: FedEx Utility configuration in Dynamics 365 CE

Once the solution is installed, it needs to be configured. To configure the solution, navigate to Settings→FedEx Configuration. Create new record and enter the following values

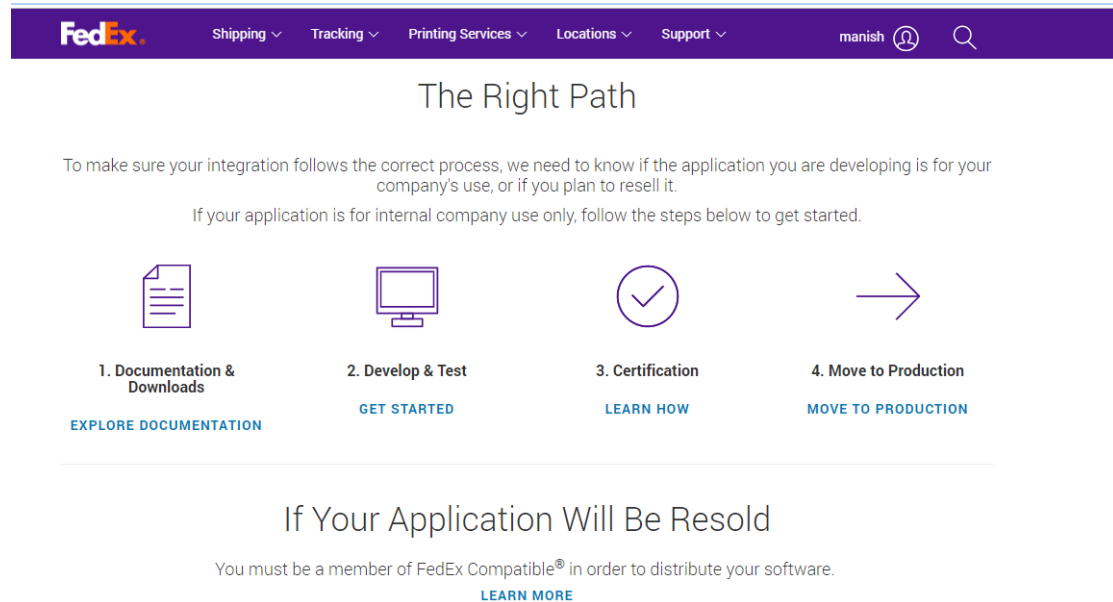
- Key
- Password
- FedEx Account Number
- FedEx Meter Number

You can generate the above values from your FedEx account

Step 2(a): Obtain FedEx Credentials

To obtain FedEx credentials go to <https://www.fedex.com/en-us/developer/web-services.html>

Sign in and click '**Get Started**' under 'Develop & Test' section as shown below:



FedEx. Shipping Tracking Printing Services Locations Support manish

The Right Path

To make sure your integration follows the correct process, we need to know if the application you are developing is for your company's use, or if you plan to resell it.

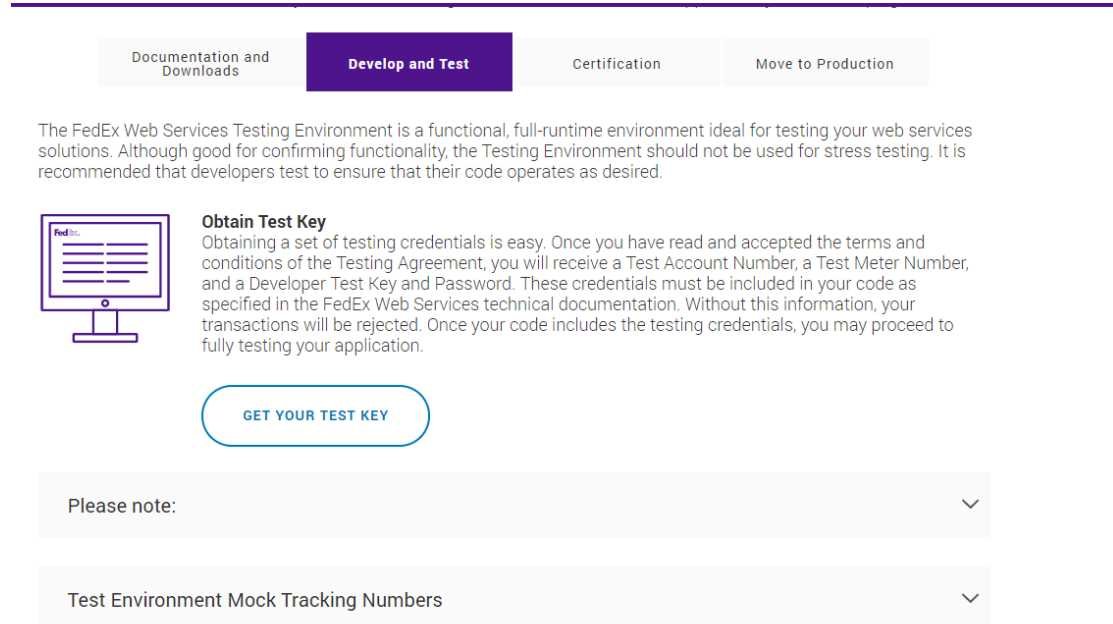
If your application is for internal company use only, follow the steps below to get started.

- 1. Documentation & Downloads**
EXPLORE DOCUMENTATION
- 2. Develop & Test**
GET STARTED
- 3. Certification**
LEARN HOW
- 4. Move to Production**
MOVE TO PRODUCTION

If Your Application Will Be Resold

You must be a member of FedEx Compatible® in order to distribute your software.
[LEARN MORE](#)

For FedEx test account credentials, you need to click **GET YOUR TEST KEY** button under Develop & Test option.



Documentation and Downloads **Develop and Test** Certification Move to Production

The FedEx Web Services Testing Environment is a functional, full-runtime environment ideal for testing your web services solutions. Although good for confirming functionality, the Testing Environment should not be used for stress testing. It is recommended that developers test to ensure that their code operates as desired.

Obtain Test Key

Obtaining a set of testing credentials is easy. Once you have read and accepted the terms and conditions of the Testing Agreement, you will receive a Test Account Number, a Test Meter Number, and a Developer Test Key and Password. These credentials must be included in your code as specified in the FedEx Web Services technical documentation. Without this information, your transactions will be rejected. Once your code includes the testing credentials, you may proceed to fully testing your application.

GET YOUR TEST KEY

Please note: ▾

Test Environment Mock Tracking Numbers ▾

Now, enter your contact information & continue. The test development key & account number will be provided to you in the next step (i.e. Confirmation step). The development account password will come separately in your registered e-mail address.

FedEx Test System Access Confirmation

1 Contact Info

2 License Authorization

3 Confirmation

Congratulations! Your Test System Access information is confirmed.
 There are two parts to the FedEx Authentication process. There is a security code and a test key.
 Please retain the following information in a secured environment. You will need this information to run your Web Services in the FedEx test environment.
 A confirmation email will be sent to you with your Test Security Code and directions for testing your FedEx Web Service application in the FedEx Test environment.

Required for All Web Services

Developer Test Key: jaXXXXXXXXXXXX

Required for FedEx Web Services for Intra Country Shipping in US and Global

Test Account Number: 51XXXXXXXXXX
 Test Meter Number: 1XXXXXXXXXX

Required for FedEx Web Services for Office and Print

Test FedEx Office Integrator ID: 123
 Test Client Product ID: TEST
 Test Client Product Version: 9999

[Go to FedEx Developer Resource Center](#)


For production, you will need to click **GET PRODUCTION KEY** under 'Move to Production' option as shown below:

Documentation and Downloads

Develop and Test

Certification

Move to Production



Move to Production

Customers moving to production will need a new set of credentials that will replace the test credentials currently in their application. Credentials include Meter Number, Authentication Key, and Password.

Note: FedEx account billing contact information is required to complete the production registration process.

GET PRODUCTION KEY

Now, enter your contact information & continue. The production key & account number will be provided to you in the next step (i.e. Confirmation step). The production account password will come separately in your registered e-mail address.

Now that solution has been installed successfully, navigate to Settings→Security→Users

Select the user and assign the FedEx Administrator security role to the selected user.

We are all good to go now.

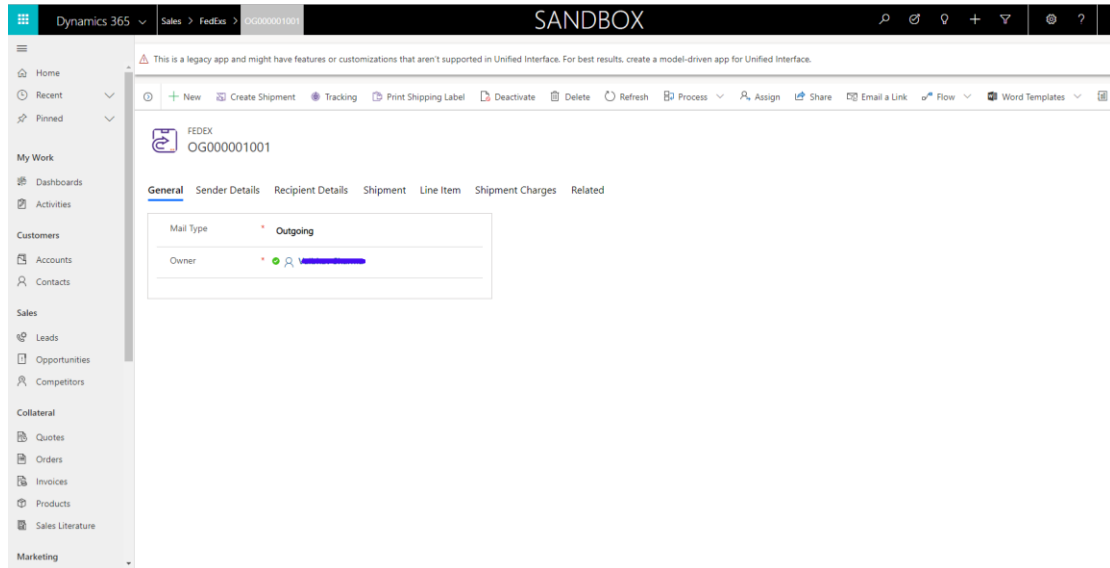
Step 3: Create Shipment(s)

After configuring FedEx utility app, now you can create shipment(s) - single or multiple shipments.

Here are the following steps to create a shipment.

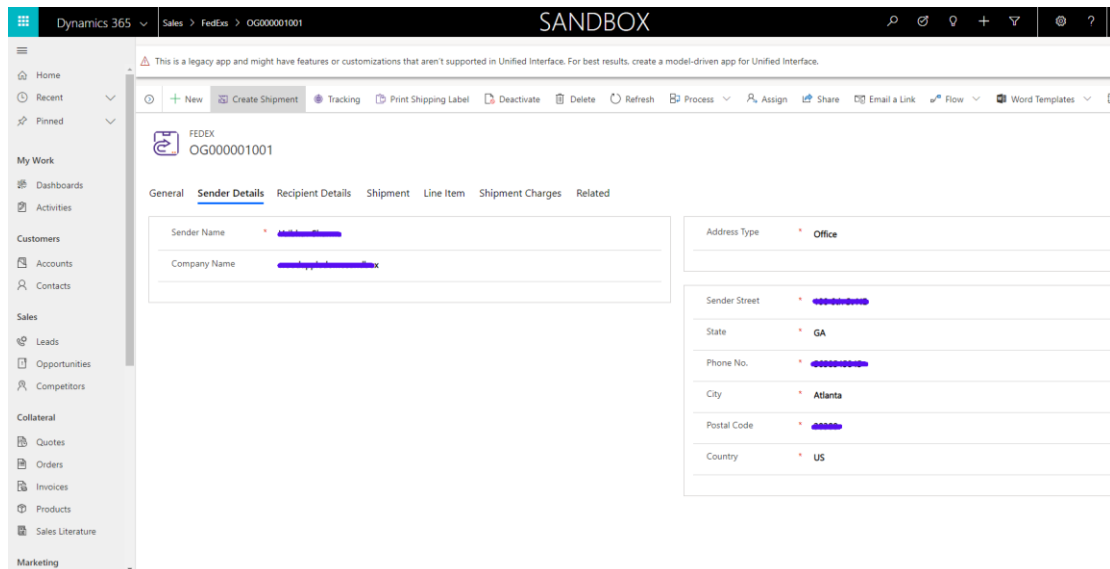
Step 3(a): Select Mail Type option

In General tab select Mail Type as **Outgoing** for creating shipments.



The screenshot shows the Dynamics 365 interface for a FedEx shipment. The 'General' tab is selected, and the 'Mail Type' is set to 'Outgoing'. The 'Owner' is listed as 'V...'. The interface includes a sidebar with navigation options like Home, Recent, Pinned, My Work, Customers, Sales, Collateral, and Marketing. The top bar shows 'Dynamics 365' and 'Sales > FedEx > OG000001001'.

In 'Sender Details' tab, the address will get automatically filled up. *To fill address automatically in this tab, [click here](#) to know about configuration.*



The screenshot shows the Dynamics 365 interface for a FedEx shipment, now in the 'Sender Details' tab. The 'Sender Name' is 'Woodapple Systems', 'Company Name' is 'woodapple.com', and the 'Address Type' is 'Office'. The address fields are filled with placeholder text: 'Sender Street' (0000000000), 'State' (GA), 'Phone No.' (0000000000), 'City' (Atlanta), 'Postal Code' (00000), and 'Country' (US). The interface includes a sidebar with navigation options like Home, Recent, Pinned, My Work, Customers, Sales, Collateral, and Marketing. The top bar shows 'Dynamics 365' and 'Sales > FedEx > OG000001001'.

Step 3(b): Fill up shipment item details in 'Line item' tab

Line Item tab takes all the information about shipment such as dimension, weight & amount as shown below:

Dynamics 365 > Sales > FedEx > OG000001001

SANDBOX

This is a legacy app and might have features or customizations that aren't supported in Unified Interface. For best results, create a model-driven app for Unified Interface.

+ New Create Shipment Tracking Print Shipping Label Deactivate Delete Refresh Process Assign Share Email a Link Flow Word Templates

FEDEX OG000001001

General Sender Details Recipient Details Shipment Line Item Shipment Charges Related

Dimension Unit in	Inches
Height	1.00
Weight Unit in	Pound
COD Amount	---
Commodity Description	1
Commodity Country of Manufacturer	US

Length	1.00
Width	1.00
Weight	1.00
Commodity Pieces	1
Commodity Unit Price	\$1.00
Commodity Customs Value	1.00

Step 3(c): Create Single Shipment

Now click on **'Create Shipment'** from the top ribbon menu to create shipment after setting the line item.

Dynamics 365 > Sales > FedEx > OG000001001

SANDBOX

This is a legacy app and might have features or customizations that aren't supported in Unified Interface. For best results, create a model-driven app for Unified Interface.

+ New **Create Shipment** Tracking Print Shipping Label Deactivate Delete Refresh Process Assign Share Email a Link Flow Word Templates

FEDEX OG000001001

General Sender Details Recipient Details Shipment Line Item Shipment Charges Related

Mail Type	Outgoing
Owner	[User Icon]

Step 3(d): Create Multiple Shipment(s)

You need to select all the available shipments in the list/grid & then click on **'Create Shipment'** from the top ribbon menu.

Dynamics 365 Sales > FedEx

SANDBOX

This is a legacy app and might have features or customizations that aren't supported in Unified Interface. For best results, create a model-driven app for Unified Interface.

Active FedEx

Name	Mail Type	Tracking Number	Delivery Status	Created On
IN000000003	Incoming	106489976484	Delivered	7/12/2019 1:52 PM
OG000001001	Outgoing	106489977208	Delivered	7/5/2019 4:50 PM
OG000001002	Outgoing	106489977447	Departed FedEx location	7/6/2019 1:22 PM

1 - 3 of 3 (3 selected)

On successful creation of shipment(s) you will be provided with tracking number(s), rate(s) & shipping labels. This information will get associated with each of the shipment(s).

View Recipient Address

On successful shipment(s) creation, **Recipient Details** tab will get the address details auto filled up.

Dynamics 365 Sales > FedEx > OG000001001

SANDBOX

This is a legacy app and might have features or customizations that aren't supported in Unified Interface. For best results, create a model-driven app for Unified Interface.

FEDEX OG000001001

General Sender Details **Recipient Details** Shipment Line Item Shipment Charges Related

Account [\[Link\]](#)

Recipient Name [\[Link\]](#)

Company Name [\[Link\]](#)

Recipient Address [\[Link\]](#) 51 SE, Atlanta, GA - 30312

Address Type Residential

Street [\[Link\]](#)

Country US

Phone No. [\[Link\]](#)

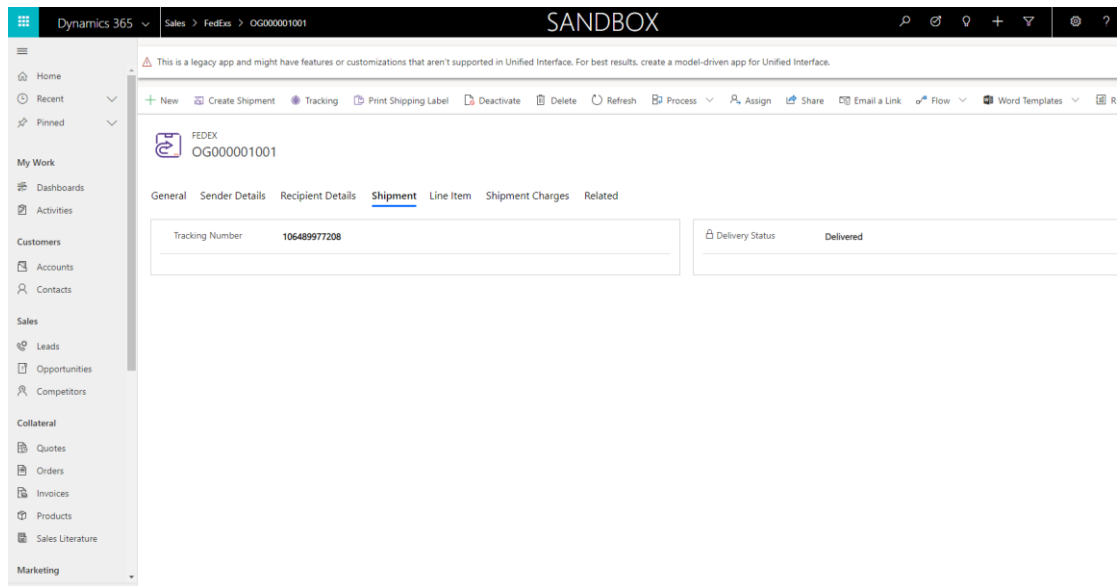
State GA

Postal Code 30312

City Atlanta

View Tracking Number & Delivery Status

Shipment tab will show the tracking number and the delivery status of the shipment(s).



This is a legacy app and might have features or customizations that aren't supported in Unified Interface. For best results, create a model-driven app for Unified Interface.

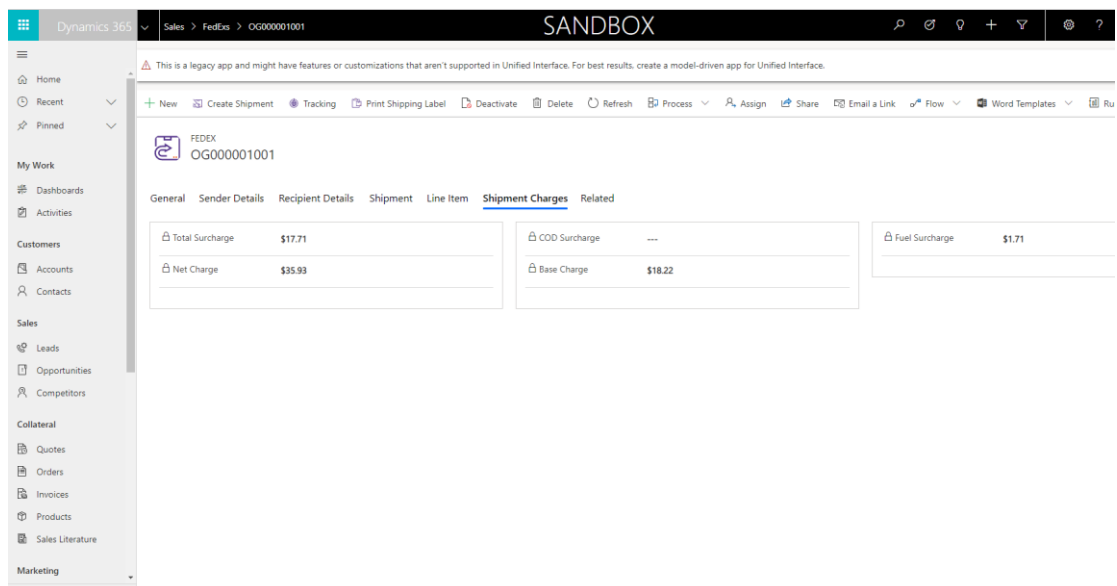
FEDEX
OG000001001

General Sender Details Recipient Details **Shipment** Line Item Shipment Charges Related

Tracking Number	106489977208	Delivery Status	Delivered
-----------------	--------------	-----------------	-----------

View Shipment Charges

Shipment Charges tab will show the charges related to the shipment. It will get auto filled up on shipment creation.



This is a legacy app and might have features or customizations that aren't supported in Unified Interface. For best results, create a model-driven app for Unified Interface.

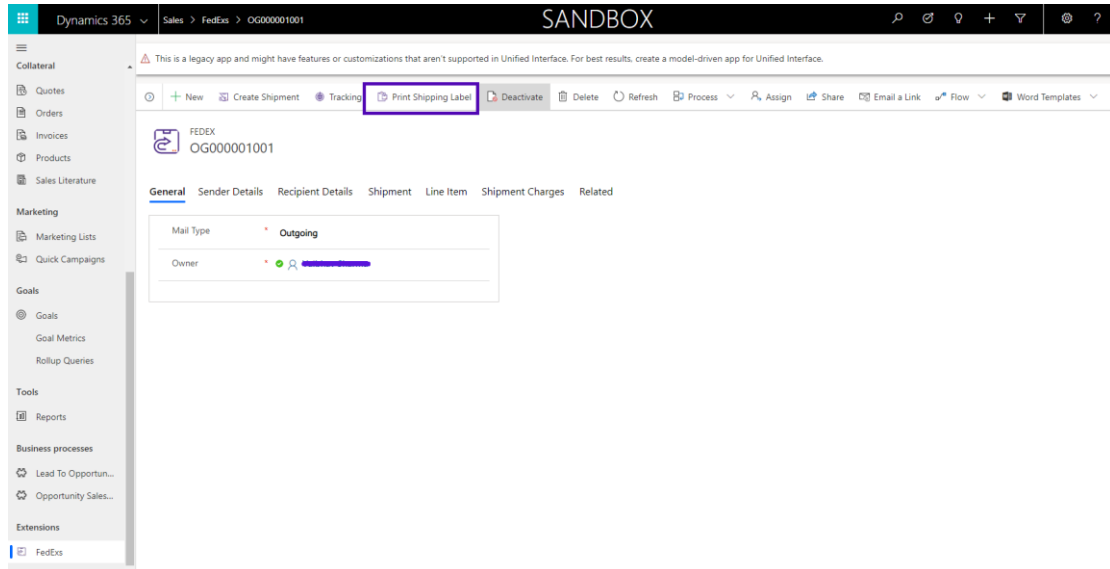
FEDEX
OG000001001

General Sender Details Recipient Details Shipment Line Item **Shipment Charges** Related

Total Surcharge	\$17.71	COD Surcharge	---	Fuel Surcharge	\$1.71
Net Charge	\$35.93	Base Charge	\$18.22		

View/Print shipping label(s)

You can open any of the shipment & click on **Print Shipping Label** option from the top ribbon menu to view/print shipping labels.



The screenshot shows the Dynamics 365 interface for a FedEx shipment. The ribbon menu at the top includes buttons for 'New', 'Create Shipment', 'Tracking', 'Print Shipping Label' (highlighted with a red box), 'Deactivate', 'Delete', 'Refresh', 'Process', 'Assign', 'Share', 'Email a Link', 'Flow', and 'Word Templates'. The main area displays the shipment details for 'FEDEX OG000001001' under the 'General' tab.

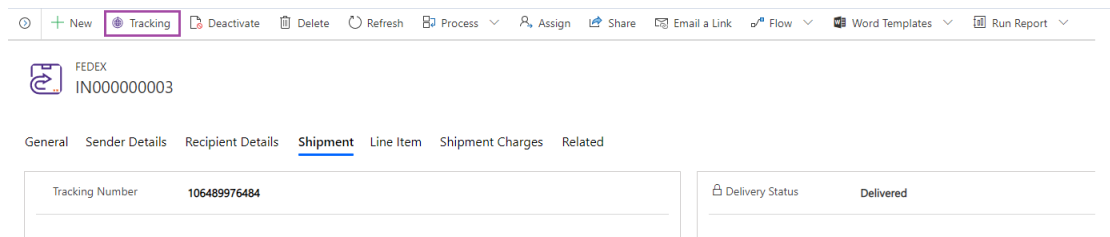
Step 4: Shipment Tracking

Once shipment(s) gets created successfully, the tracking number gets associated along with each shipment. You can then track shipments.

Step 4(a): Track Single Shipment

You need to click on **Tracking** button from top ribbon menu to track the shipment status. Updated shipment status will get saved automatically.

Note: Tracking number cannot be empty.

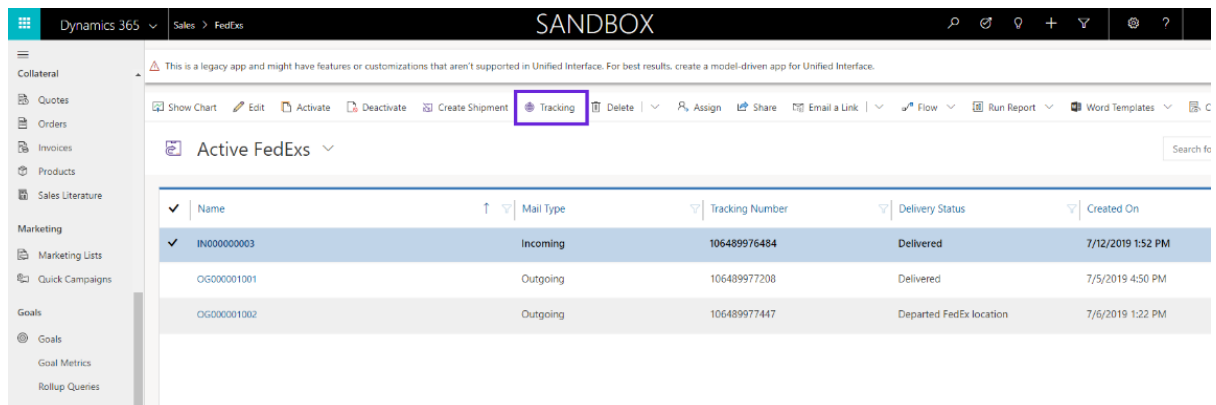


The screenshot shows the Dynamics 365 interface for a FedEx shipment. The ribbon menu at the top includes buttons for 'New', 'Tracking' (highlighted with a red box), 'Deactivate', 'Delete', 'Refresh', 'Process', 'Assign', 'Share', 'Email a Link', 'Flow', 'Word Templates', and 'Run Report'. The main area displays the shipment details for 'FEDEX IN000000003' under the 'Shipment' tab.

Tracking Number	Delivery Status
106489976484	Delivered

Step 4(b): Track Multiple Shipments

You need to select at least one or more shipments from the grid & click on **Tracking** button in the ribbon menu as shown below. Once the tracking is done updated shipment status will get saved automatically. You can see the tracking details in the grid under **Delivery Status** column & also under **Shipment** tab in shipment details.

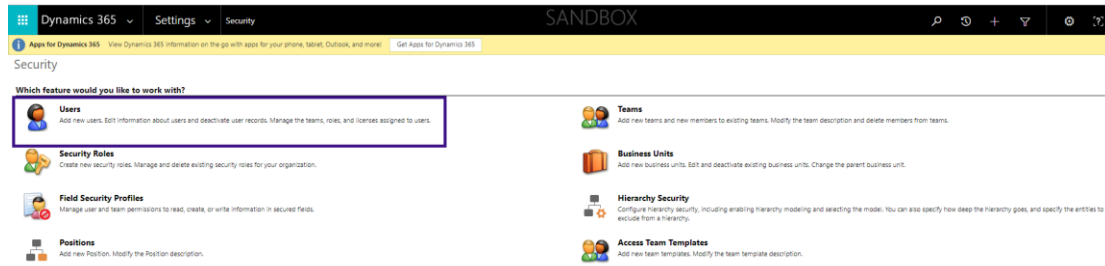


The screenshot shows the Dynamics 365 interface for a FedEx shipment. The ribbon menu at the top includes buttons for 'Show Chart', 'Edit', 'Activate', 'Deactivate', 'Create Shipment', 'Tracking' (highlighted with a red box), 'Delete', 'Assign', 'Share', 'Email a Link', 'Flow', 'Run Report', 'Word Templates', and 'C'. The main area displays a grid of active FedEx shipments.

Name	Mail Type	Tracking Number	Delivery Status	Created On
IN000000003	Incoming	106489976484	Delivered	7/12/2019 1:52 PM
OG000001001	Outgoing	106489977208	Delivered	7/5/2019 4:50 PM
OG000001002	Outgoing	106489977447	Departed FedEx location	7/6/2019 1:22 PM

Address auto fill up configuration for shipment creation

To fill up address automatically in '**Sender Details**' tab, go to **Settings > Security > Users**. Select the user from the users list.



Enter the user address under the Mailing Address section. The address entered here will show up in the '**Sender Details**' tab while creating shipment(s).

