FedEx Rate Comparator and Shipment Tracking

Zoho CRM Extension

User Manual

Version 2.0

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FedEx Rate Comparator and Shipment Tracking – Zoho CRM Extension : User Manual

1. Overview

FedEx Corporation is an American multinational courier delivery services company. **FedEx Rate Comparator and Shipment Tracking** is a Zoho CRM Extension developed by Tiara, a Zoho Alliance Partner, and available in Zoho Marketplace for all Zoho users to deploy as an extension for Zoho CRM.

Using this extension, Zoho CRM users can easily track your FedEx shipment using FedEx Tracking Number within Zoho CRM and also, get the FedEx Shipping rate for different delivery options (service type) such as Next Day Priority, 2-Day, Economy etc. from within your Zoho CRM account.
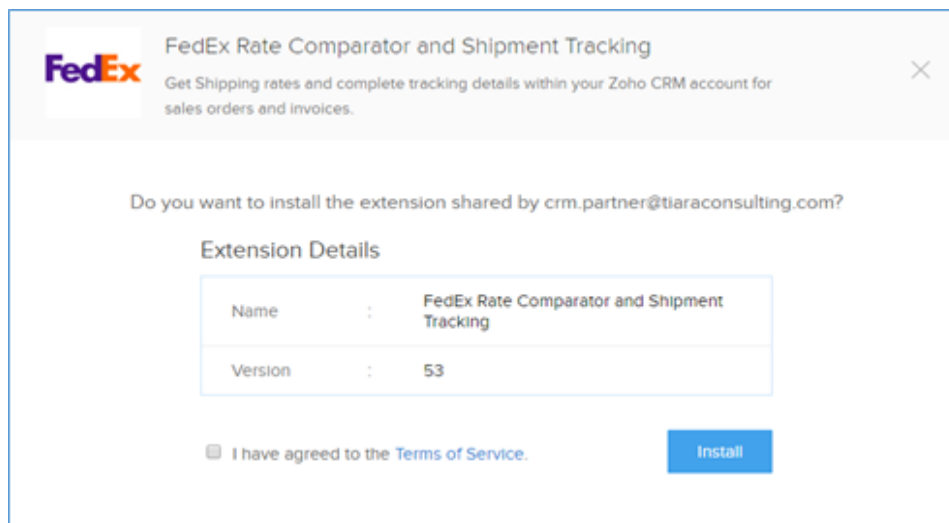
This User Manual document provides step-by-step instructions to install this extension from Zoho Marketplace, how to configure and use the shipment tracking functions within your Zoho CRM account.
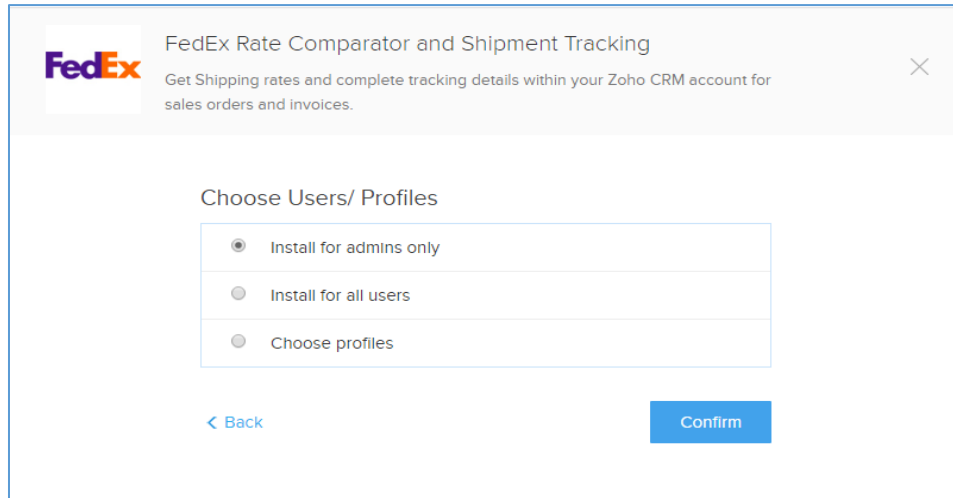
1.1. Install the FedEx Extension

You can either go to Zoho Marketplace and search for "FedEx" to locate the extension and install directly from the Marketplace. Alternatively, you can install the FedEx extension by logging in to your Zoho CRM account and follow the below installation instructions.

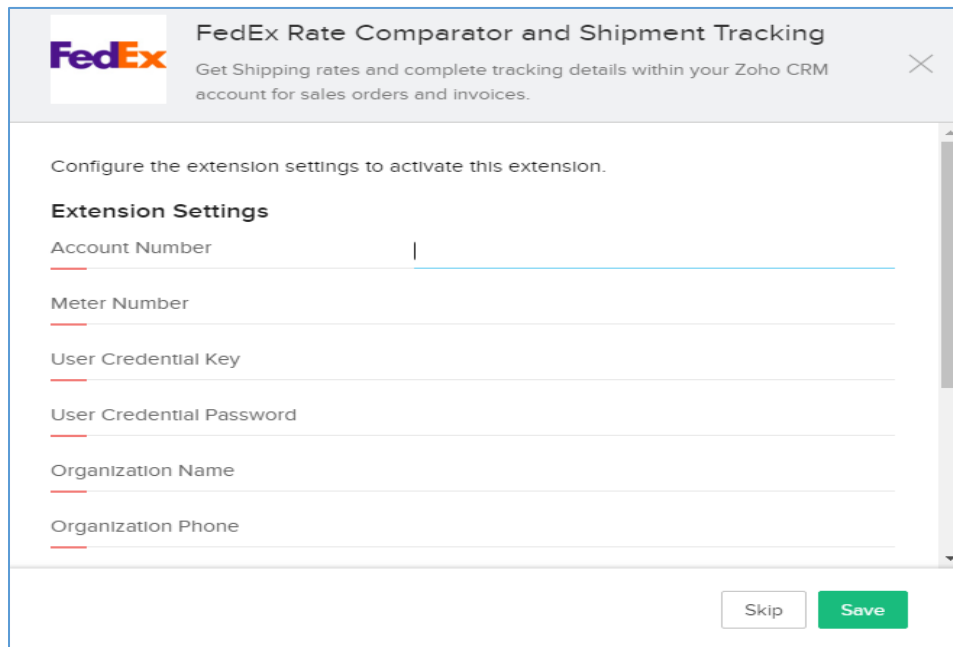**To install the FedEx extension from within Zoho CRM**:

❖ Go to **Setup** > **Marketplace** > **All**. By default, all the Zoho extensions currently installed within your Zoho CRM account are listed. Go to "**All Extensions" tab** to viewall available extensions.
❖ Click **All Extensions,** browse/search for *FedEx*, locate (see screenshot below) and then click the extension. The details about the extension will be shown as per screenshot below.
❖ Click **Install** button**.**
❖ Make sure you check the "Agree to the *Terms of Service"* *checkbox* and click **Install**.

❖ Select one of the Profile of Users for whom you want to install the extension and click **Confirm** button as shown in the screenshot below
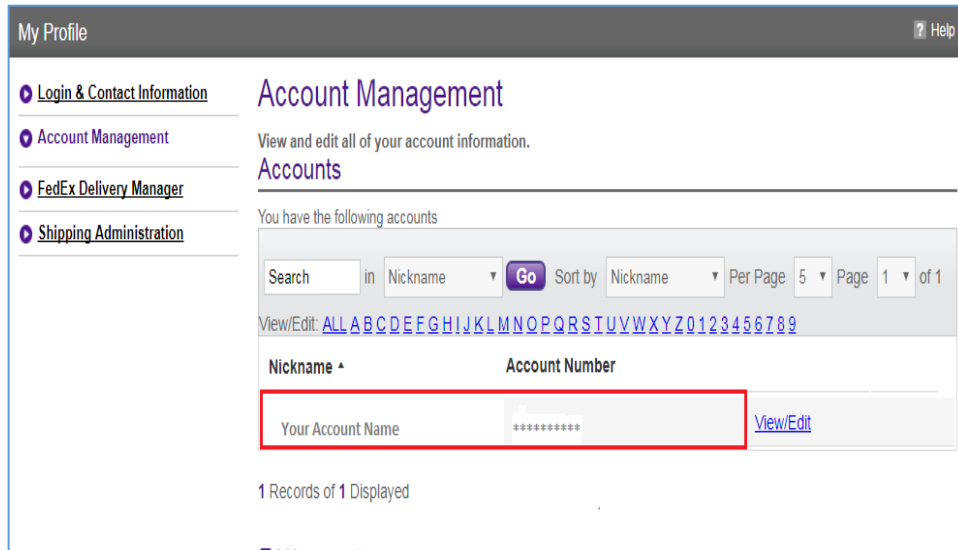

❖ Specify the *credentials* of your FedEx account, Address of your Company / Organization and click **Save**.

1.2. Finding your FedEx Credentials (mandatory parameters for installing FedEx Extension)

To activate the FedEx Extension, the below FedEx credentials are mandatory. This section explains each of the FedEx credential information that you need to enter while installing the FedEx extension as shown in the screenshot above. In the following, each of the FedEx credential fields and how to obtain the data from your paid FedEx account are explained.

❖ **Account Number:** Your FedEx Account Number assigned by FedEx after successful sign-up of a paid FedEx account. It can be viewed within the **Account Management** page of your FedEx Account login (www.fedex.com) under **My Profile menu** as shown in the screenshot below.

❖ **Meter Number:** The meter number will be provided by FedEx in the first email that you would have received from FedEx after the successful registration / sign-up of a FedEx Account.
❖ **User Credential Key and Password:** Your current login credentials of your FedEx Account.

Note: Below is a sample email received from FedEx at the time of new account sign-up and the above fields are highlighted in this email.

2. Tracking FedEx Shipment

The user can track any shipment by entering FedEx tracking number within the Invoice module of Zoho CRM.

2.1 Invoice

In Invoice module, the following customer fields are created after the successful installation of FedEx Extension. Below are the details of the custom fields created by the extension within **Invoice** module.

- ❖ **FedEx Tracking Number:** Text Field
- ❖ **Tracking Status Detail:** Text Field

IMPORTANT NOTE:

1. **Step to see tracking info:** Enter the FedEx Tracking number in the custom field and click SAVE button. Upon clicking the SAVE button, the shipment tracking information is fetched and displayed on the 'Tracking Status Details'.

2. **Sales Signals:** All the tracking information will be automatically shown as "Sales Signals" status as shown in the screenshot below.
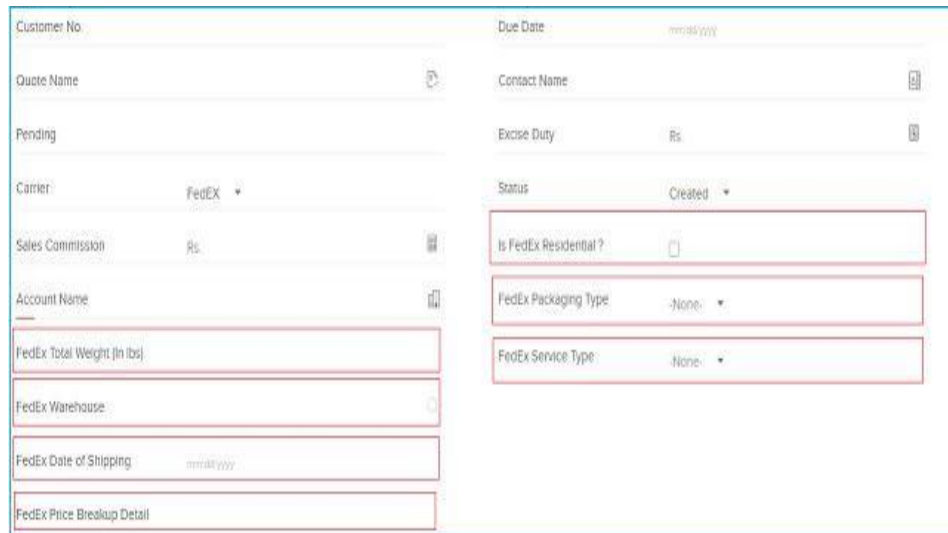
3. FedEx Rate Comparator

In addition to tracking the FedEx shipment, user can also calculate the FedEx shipment rate by providing the following package parameters and also, compare the rate of different options and pick the best option.

❖ Weight of the Product
❖ Type of the Packing
❖ Address of the addressee
❖ Address of the Sender
❖ Residential Condition
❖ FedEx Date of Shipping.

3.1 Rate Comparator – Within Sales Order module

The FedEx Rate Comparator functionality is enabled within **Sales Order** module of Zoho CRM. Following custom fields are created within SO module upon the installation of FedEx Extension.

❖ **FedEx Total Weight (lbs)** : Text Field
❖ **Is FedEx Residential?** : Check Box
❖ **FedEx Shipping date** : Date Time Field
❖ **FedEx Packaging Type** : Dropdown Field
❖ **FedEx Warehouse Address** : Lookup Field
❖ **FedEx Breakup Charged Details** : Text Field
❖ **FedEx Service Type** : Lookup Field

After entering values for the above custom fields, click **SAVE** button for the extension to display the Shipping Rate for each of the available Shipment Options in the '**FedEx Breakup Charged Details**' field as shown in the above screenshot. The user can select any one of the available Shipment Option and the Shipment Cost will be added as a separate line item in the Sales Order, and the grand total is displayed as shown in the screenshot below.

3.2 Rate Comparator – Within Quotes module

The FedEx Rate Comparator functionality is enabled within **Sales Order** module of Zoho CRM. Following custom fields are created within SO module upon the installation of FedEx Extension

- ❖ **FedEx Total Weight (lbs)**   :   Text Field
- ❖ **Is FedEx Residential?**   :   Check Box
- ❖ **FedEx Shipping date**   :   Date Time Field
- ❖ **FedEx Packaging Type**   :   Dropdown Field
- ❖ **FedEx Warehouse Address**   :   Lookup Field
- ❖ **FedEx Price Breakup Detail**   :   Text Field
- ❖ **FedEx Service Type**   :   Lookup Field

After entering values for the above custom fields, click **SAVE** button for the extension to display the Shipping Rate for each of the available Shipment Options in the '**FedEx Breakup Charged Details**' field as shown in the above screenshot. The user can select any one of the available Shipment Option and the Shipment Cost will be added as a separate line item in the Sales Order, and the grand total is displayed as shown in the screenshot below.

4. Warehouses – Custom Module to create multiple warehouses

FedEx extension supports shipping from multiple warehouse addresses and so, the shipment cost can be calculated and added in the Sales Order for shipments from different warehouse.

To enable multiple warehouses, a custom module called "Warehouse" gets added by the FedEx tension. This custom module is used to setup and manage the multiple warehouses so that the shipment cost is calculated based on the selected warehouse.

Following screenshot shows how to create a new warehouse. Upon adding new warehouse, it automatically appears in the "Warehouse" drop down field within Sales Order module so that shipment cost gets calculated for the selected warehouse.

5. Support Contacts for FedEx Extension – Tiara Help Desk

Thank you for installing FedEx Extension. If you have any questions or facing installation issues, please contact Tiara Support Desk for Zoho Extensions via email at zohosupport@tiaraconsulting.com or call us at **(925) 218 4080**.

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