

# FedEx Rate Comparator and Shipment Tracking

# **Zoho CRM Extension**



**User Manual** 

Version 2.0

# **Prepared By:**







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

## 1. Overview

ZOHO

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 <u>Zoho Marketplace</u> 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.

FedEx Get	dEx Rate Com Shipping rates and s orders and invoic	nparato I complete :es.	r and Shipment Tracking tracking details within your Zoho CRM account for	×
Do you	Extension De Name Version	the externation the etails the externation the	FedEx Rate Comparator and Shipment Tracking 53 erms of Service.	om?



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 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

FedEx	FedEx Rate Comparator and Shipment Tracking Get Shipping rates and complete tracking details within your Zoho CRM account for sales orders and invoices.	×
	Choose Users/ Profiles	
	Install for admins only	
	Install for all users	
	Choose profiles	
	< Back Confirm	

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

<b>FedEx</b>	FedEx Rate Comparator and Shipment Tracking Get Shipping rates and complete tracking details within your Zoho CRM account for sales orders and invoices.	$\times$
Configure the	extension settings to activate this extension	
Extension S		
Extension S	ettings	
Account Numb	er	
Meter Number		
User Credentia	al Key	
User Credentia	al Password	
Organization N	lame	
Organization F	hone	
	Skip	ve

### 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.

My Profile		? Help						
Login & Contact Information	Account Management							
Account Management	View and edit all of your account information. Accounts							
• FedEx Delivery Manager • Shipping Administration	Accounts							
	You have the following accounts							
	Search in Nickname  Go Sort by Nickname  Per Page 5  Page 1	of 1						
	View/Edit: <u>ALLABCDEEGHIJKLMNOPQRSTUVWXYZ0123456789</u>							
	Nickname  Account Number							
	Your Account Name ********* View/Edit							
	1 Records of 1 Displayed							
	B M to const							

- 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.

<u>Note</u>: Below is a sample email received from FedEx at the time of new account signup and the above fields are highlighted in this email.

Now that you've tested your application, you're ready to move to production. You should have received your Production Key on the confirmation page when registering for credentials. Below are the remaining production credentials you requested.

Production Account Information

Production URL: <u>https://ws.fedex.com:443/web-services</u> Password: <u>XXXXXXXXX</u> FedEx Shipping Account Number: <u>XXXXXX500</u> FedEx Web Services Meter Number: <u>XXXXXXXXXX</u>

Replace the URL and test credentials with production information and begin using FedEx Web Services.





## 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

Invoice Information					
Involce Owner	durga devi durga devi 👻		Sales Order		D
Subject			Purchase Order		
Involce Date	11/01/2018		Excise Duty	Rs.	R
Due Date	mmi@jygy		Status	Created ·	
Sales Commission	RL	u	FedEx Tracking Status		
Account Name		ţ.			
Contact Name		9			
Earley Tracking Mumbar					

#### **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.

∋	Home	Feeds	Leads	Accounts	Contacts	Deals	Activities	Reports	Dashboards	Products	•••	All Tabs	•	Q +	e (PA)	۵	۵ 🔘
w	elcome zp	projectus	er										SalesS	ignals			×
	Open Ta	sks ල		No Activitie:	s found			:	Today's I	Leads C		No Leads foun	M	은 Muke FedE: 오 Muke TCS	sh kumar Rate Dec sh Kumar ng Status	: #4200317	03:44 PM
	Closing	This Mon	th උ					:	Pipeline	by Stage	C						
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# 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 Deta	ails :	Text Field
*	FedEx Service Type	:	Lookup Field

Customer No:			Due Date	makym	
Quote Name		Ø	Contact Name		8
Pending			Excise Duty	Rs	8
Camler	FedEX *		Status	Created *	
Sales Commission	Rs.	Ш	Is FedEx Residential ?	0	
Account Name		đ	FedEx Packaging Type	-None ·	
FedEx Total Weight (In Ibs)			FedEx Service Type	None •	
FedEx Warehouse		o			
FedEx Date of Shipping	mmall/WW				
FedEx Price Breakup Deta	il .				

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.



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Product Details	List Price (\$)	Guantity	Amount (\$)	Discount (\$)	Tex (\$)	Total (\$)	
FedEx Shipping Charge	33.46	1	33,46	0.00	0.00	33.46	**
Pen (PN-000%)	500.00	1	500.00	0.00	0.00	500.00 ×	
Product Description							
Add Line Items						Sub Total         \$ 533.46           Discount         \$ 0.00           Tax         \$ 0.00           Adjustment         0.00           Grand Total         \$ 533.46	

#### 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? :
- FedEx Shipping date
- FedEx Packaging Type
- FedEx Warehouse Address
- FedEx Price Breakup Detail
- FedEx Service Type

Customer No.			Due Date	miskyny	
Oucte Name		Ø	Contact Name		0
Pending			Excise Duty	Rs	6
Camler	FedEX •		Status	Created *	
Sales Commission	Rs.	в	Is FedEx Residential ?	Ő	
Account Name		D1	FedEx Packaging Type	None *	
FedEx Total Weight (In Ibs)			FedEx Service Type	None •	
FedEx Warehouse		ō			
FedEx Date of Shipping	mmilityyyy				
FedEx Price Breakup Detai	if.				

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.



Check Box Date Time Field **Dropdown Field** 

- Lookup Field
- **Text Field**
- Lookup Field





Product Details	List Price (\$)	Guantity	Amount (\$)	Discount (\$)	Tax (\$)	Total (\$)	
FedEx Shipping Charge	33.46	1	33.46	0.00	0.00	33.46	
Pen (PN-0001)	500.00	1	500.00	0.00	0.00	500.00 ×	
Product Description	A						
						Sub Total \$ 533.46	T
Add Line Items						Discount \$0.00	
Phone and a france						Tax \$0.00	
						Adjustment 0.00	
						Grand Total \$ 533.46	

# 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.

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	Particula									in the	
	Organization, Frenk									Organization Same	





# 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 <u>zohosupport@tiaraconsulting.com</u> or call us at **(925) 218 4080**.

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