



# FedEx Ship Manager™



FedEx Transborder Distribution®

FedEx® International  
DirectDistribution  
Surface Solutions

User Guide

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## FedEx Transborder Distribution® FedEx® International Direct Distribution Surface Solutions User Guide

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# 1.1 What is FedEx Transborder Distribution®?

The FedEx® International DirectDistribution Surface Solutions service, also known as FedEx Transborder Distribution (TD) allows you to consolidate your U.S. bound shipments for simplified customs clearance.

TD shipments are processed using a FedEx Ship Manager™ (FSM) system located in Canada, but their shipping labels display U.S. origin and U.S. destination addresses. TD shipments are consolidated and sent via linehaul to the U.S. where they cross the border and travel to their final destinations as intra-U.S. shipments. The U.S. entry point is used as the shipping origin.

The full range of U.S domestic services are available to TD shippers, including:

- FedEx Express® services
- FedEx Ground® services
- FedEx Home Delivery® services (where available)

FedEx® also offers an optional TD linehaul service.



# 1.2 FedEx Transborder Distribution® Automation Terms

## **TD Child package**

A single, intra-U.S. package created from a Canadian FSM system. Each TD Child package is assigned to a TD Master shipment for tracking purposes.

## **TD Master Shipment**

The TD Master shipment is not an actual shipment or package. The TD Master shipment identifies the group of TD Child packages traveling from Canada to the U.S. A unique air waybill number, called the TD Master Shipment ID is assigned to the TD Master shipment for U.S. customs clearance purposes. A TD Master shipment can contain both Express and Ground Child packages. Once the TD shipment enters the U.S., the individual TD Child packages are separated from the TD Master shipment for intra-U.S. distribution.

## **TD Sender**

This is the U.S return address for intra-U.S. TD Child packages.

## **TD Shipping Profile**

Profile settings provided within FSM to customize TD specific shipping activities.

## **TD Dashboard**

Interface used to manage TD Master shipment activity.

## **End TD Shipping Day**

The task performed once all TD shipping activities have been completed for the current shipping date.

## 2.1 Creating a TD Return Address

In addition to existing Canadian Senders, a TD Sender, with a U.S. origin address is required when creating TD shipments. All Senders — U.S. and Canadian are created in the Senders Database.

To create a TD Sender, click the **Databases** drop-down menu and select the **Sender** option.

Once the View Senders dialog box displays, click the **Add** button to add a TD Sender.

The following fields are mandatory:

- Sender ID
- Country (must be U.S.)
- Contact Name and/or Company Name
- Address 1
- City
- State
- Zip
- Telephone

Click the **OK** button once you have entered the required TD Sender information.

The screenshot shows a software dialog box titled "Add Sender" with a blue header bar. The main area is light yellow and contains several input fields and dropdown menus. The fields are organized into two columns. The left column includes: "Sender ID" (text box with "TD RETURNS"), "Country" (dropdown menu with "US - United States"), "Contact name:" (text box with "TD CONTACT NAME"), "Company name:" (text box with "TD COMPANY NAME"), "Address 1:" (text box with "123 TEST ST."), "Address 2:" (empty text box), "City:" (dropdown menu with "BUFFALO"), "State:" (dropdown menu with "NY - New York"), "Zip:" (text box with "14222"), "Telephone:" (text box with "(555) 555-5555"), "Email Address:" (empty text box), and "Notification Language:" (dropdown menu with "English"). Below these is a checkbox labeled "This is a residential address" which is unchecked. The right column includes: "Tax ID:" (empty text box), "Social security number:" (text box with "- -"), "Dun Bradstreet:" (empty text box), "Signature release:" (empty text box), "ALC number:" (empty text box), "PO number:" (empty text box), "Broker ID:" (dropdown menu), and "Electronic Signature:" (empty text box). Below these is a section titled "Shipping profiles" with three dropdown menus: "Domestic:" (set to "DEFAULT"), "International:" (set to "DEFAULT"), and "Transborder distribution:" (set to "DEFAULT"). At the bottom of the dialog are three buttons: "OK", "Add another", and "Cancel".

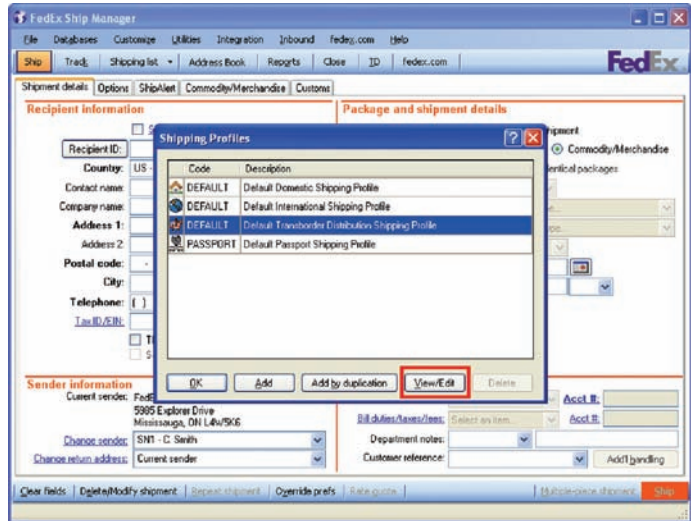
## 2.2 Setting up a TD Shipping Profile

Default TD shipping values can be set via a TD Shipping Profile.

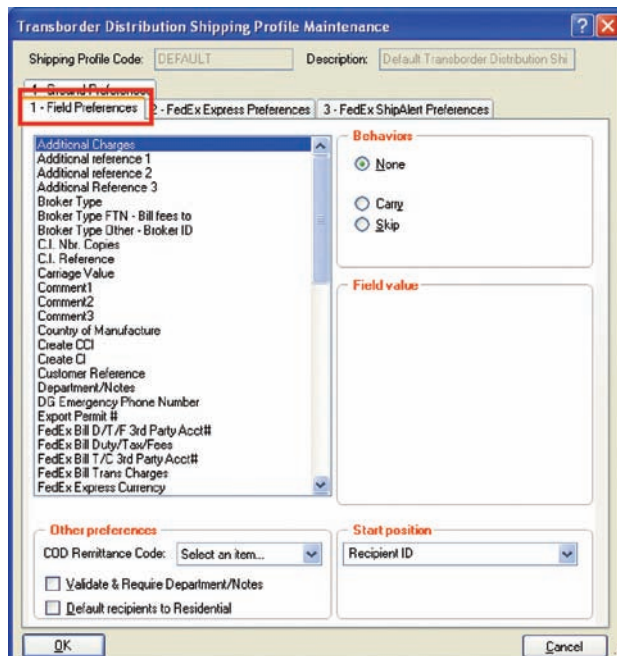
To access Shipping Profiles, click the **Customize** drop-down menu and select the **Shipping Profiles** option. The Shipping Profiles dialog box will appear.

Click the **View/Edit** button to update the Default Transborder Shipping Profile or click the **Add** or **Add by duplication** button to create a new TD Profile.

If a new TD Profile is created, be sure to associate it with your preferred sender address via the View Senders screen.



Default settings for fields used when shipping TD can be modified via the Transborder Distribution Shipping Profile Maintenance screen. Select from a list of fields provided on the **1 – Field Preferences** tab and define the field's behavior accordingly.



## 2.2 Setting up a TD Shipping Profile continued ...

TD FedEx Express® specific preferences can be set via the **2 – FedEx Express Preferences** tab and TD FedEx Ground preferences can be set via the **4 – Ground Preferences** tab.

Preference options include the ability to add fixed and variable handling charges and the ability to create a customizable doc tab label.

Note that for all TD Shipments, it is mandatory for the label format to be set to Format 354.

Transborder Distribution Shipping Profile Maintenance

Shipping Profile Code: DEFAULT Description: Default Transborder Distribution Sht

4 - Ground Preference

1 - Field Preferences 2 - FedEx Express Preferences 3 - FedEx ShipAlert Preferences

**Miscellaneous**

Require References

Tracking # Overwrite

**Insert in References**

None

**Reference Label**

1Day Freight

2Day Freight

**Handling Charge**

Include Additional Handling Charge

Fixed amount: \$0.00 CAD

Variable amount: % of Select an item...

**Label Format**

FedEx Express Label Format

Format 354 - 4x6.75 Thermal Label with Doc Tab

Default doc tab configuration

Customize doc tab configuration

Doc tab configuration

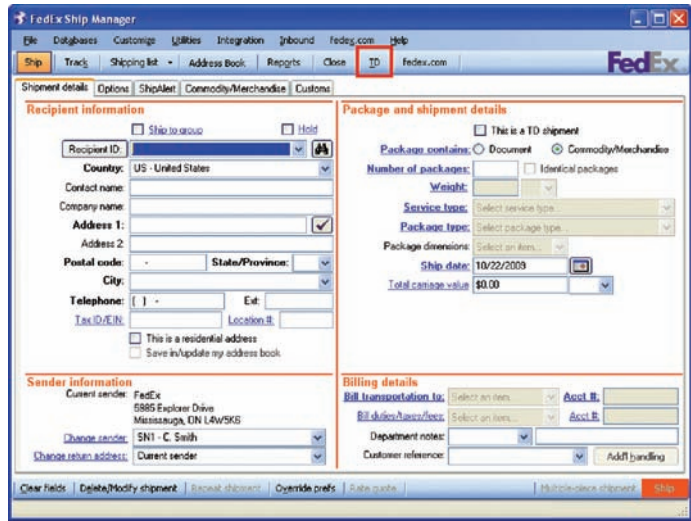
OK Cancel

# 3.1 Creating a TD Master Shipment — Ship Screen

The first step to creating a TD shipment is to open a TD Master.

To create a TD Master shipment, click the TD button. Note that your account number must be TD enabled for the TD button to appear.

The TD Dashboard will appear.

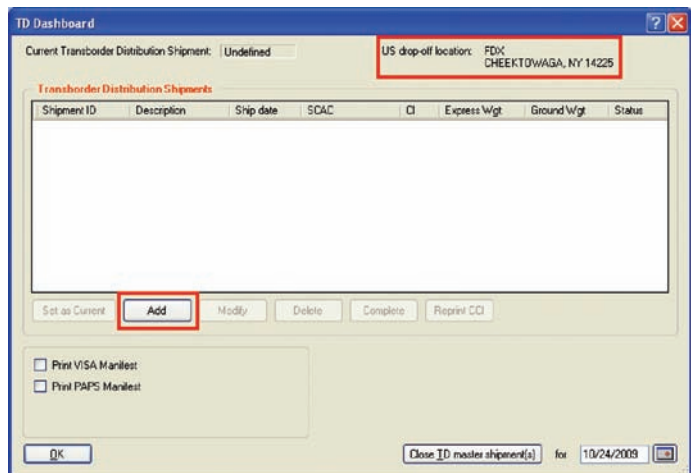


# 3.2 Creating a TD Master Shipment — TD Dashboard

The TD Dashboard is the screen where you can:

- Create TD Master shipments.
- Modify existing TD Master shipment Information.
- Delete TD Master shipments.
- Complete open TD Master shipments.
- Set a TD Master shipment's status to Current.
- Close TD Master shipments.
- View your U.S. drop-off location.

Click the **Add** button to access the TD Shipment Information Screen to create a TD Mater shipment.



## 3.3 Creating a TD Master Shipment — TD Shipment Information Screen

The TD Shipment Information screen is where values such as currency, weight type and duties/taxes/fees billing are defined for each TD Child package within a TD Master shipment.

The following fields on the TD Shipment Information screen are mandatory:

- **Ship date** — Date that you plan to tender your packages to FedEx®.
- **FedEx Linehaul Payment Type** — Required if FedEx will be transporting your consolidated TD Master shipment to the U.S. drop-off location.
- **Currency** — Canadian dollars (CAD) or U.S. dollars (USD).
- **Weight type** — lbs. or kgs.
- **Bill duties/taxes/fees to** — Sender or Third Party.
- **Broker** — Select FedEx Trade Networks (FTN), key in your broker's name and phone number, or select a broker from the address book.
- **Return to** — Select a U.S. return address or enter one by clicking the **View/Edit** button.

The following fields are optional:

- **TD Master Shipment Description** — Name TD Master shipments to easily distinguish between multiple TD Master shipments.
- **SCAC code** — Four character Standard Carrier Alpha Code (SCAC) used to identify your linehaul provider (e.g. FXFC for FedEx Freight).
- **Create Consolidated Commercial Invoice** — Check this box if you would like to print a consolidated commercial invoice for your records. This document includes information for each TD Child shipment within the TD Master shipment, but it cannot be used for customs clearance.
- **Create Commercial Invoice(s)** — Check this box if you would like individual commercial invoices to print for each TD Child package.
- **Export Permit #** — If applicable, enter an Export Permit #.
- **Importer ID** — If applicable, select an Importer of Record or enter one by clicking the **View/Edit** button.
- **Sold to** — If applicable, select a Sold To contact or enter one by clicking the **View/Edit** button.

*Note that default selections can be set for all of these fields via a TD Shipping Profile. See section 2.2 for more details on setting preference defaults.*

*Once you have finished entering your TD Master shipment information, click the **OK** button.*

## 3.4 Creating a TD Master Shipment — TD Dashboard

Once all TD Master shipment information is complete, the TD Dashboard will appear with a new entry. The dashboard displays the following information about TD Master shipments:

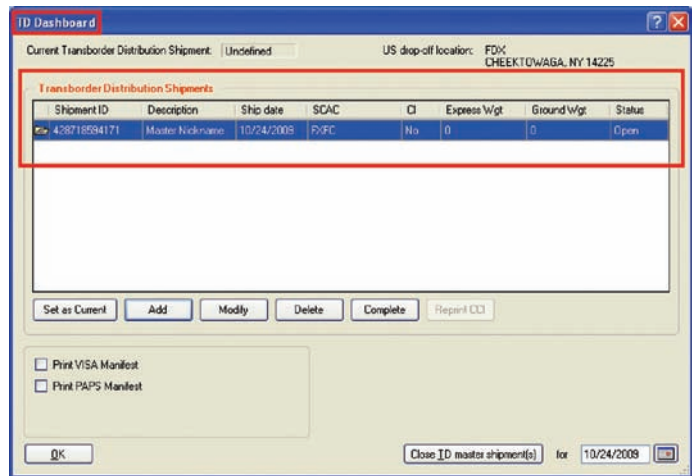
- TD Master Shipment ID (Master Tracking Number for all TD child shipments).
- Ship date as specified via the TD Shipment Information Screen.
- SCAC code entered.
- CI (Yes or No, depending upon the Consolidated Commercial Invoice selection made via the TD Information Screen).
- Express weight.
- Ground weight.
- Shipment status (i.e. Open, Closed).

TD Child packages can only be added to TD Master shipments with an **Open** status.

Next, highlight the TD Master Shipment ID to which you would like to associate your TD Child packages. Click the **Set as Current** button. The TD Master Shipment ID icon will display a star.

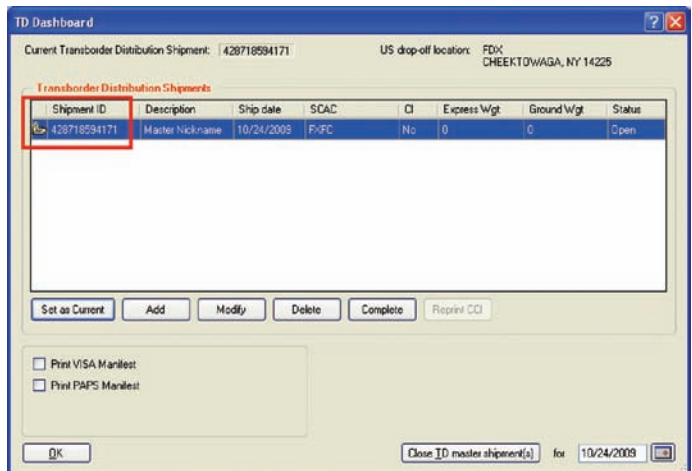
Note that several TD Master Shipment IDs can be open at the same time. However, **only one TD Master shipment can be set as Current**.

Once a TD Master shipment has been set to Current, click the **OK** button to return to the FSM ship screen.



### Note:

The Express and Ground Wgt fields represent the weight of all Express and Ground TD Child packages that have been added to the TD Master shipment.



## 3.5 Adding TD Child Packages to a TD Master Shipment

Once you have set a TD Master shipment to Current and you have returned to the FSM ship screen, you can add TD Child packages to the TD Master shipment by selecting a U.S. recipient address and checking the **This is a TD shipment** box. Complete all required fields and click the **Ship** button to process the TD Child shipment.

### Note the following:

- **Number of packages** field is defaulted to "1".
- **Weight Type** and **Currency Type** fields are defaulted to the values set via the current TD Master shipment.
- U.S. domestic services display in the **Service type** drop down menu — remember that U.S. domestic size and weight restrictions apply to TD Child shipments.
- **Bill duties/taxes/fees** to selection is defaulted to the value set via the current TD Master shipment.
- **Current return address** displays the TD Return address set via the current TD Master shipment.

### Additional Information:

**TD Rate Quotes:** Rate quotes are returned in U.S. dollars. A dynamic rate quote is generated for each TD Child shipment and is displayed on the Ship screen. The **Rate quote** button can be used to view a breakdown of the rate, including surcharges and discounts (where applicable). Rate quote exceptions are:

- Rate quote is disabled when the currency for declared/customs value is not U.S. dollars.
- Rate quote is disabled for Recipient and Third Party transportation billing selections.

**TD Home Delivery:** Home Delivery will only appear as a service option when the **This is a residential address box** is checked on the Ship screen.

The screenshot shows the FedEx Ship Manager application window. The main area is divided into several sections:

- Recipient Information:** Includes fields for Recipient ID, Country (US - United States), Contact name (TEST CONTACT NAME), Company name (TEST COMPANY NAME), Address 1 (TEST ADDRESS 1), Address 2, Postal code (14222), State/Province (NY), City (BUFFWELL), Telephone (333) 333-3333, and Fax. There are checkboxes for "Ship to cargo", "Hold", "This is a residential address", and "Save in/Update my address book".
- Package and shipment details:** Includes a checked box for "This is a TD shipment", "Package contains" (Commodity/Mechandise), Number of packages (1), Weight (1), Service type (2 - FedEx Standard Overnight), Package type (1 - Your Packaging), Package dimensions (Z - Enter Dimens, 12 x 10 x 6 in), Ship date/TD master ID (10/24/2009-Master Nick), Total carriage value (\$0.00), and Total Customs Value (\$0.00).
- Sender Information:** Shows current sender (FedEx, 3905 Englewood Drive, Middletown, ON L4W5K6) and current return address (TD COMPANY NAME, 123 TEST ST, BUFFALO, NY 14222).
- Billing details:** Includes Bill transportation to (1 - Sender), Acct. # (99999999), Bill duties/taxes/fees (1 - Sender), Acct. # (99999999), Department notes, and Customer reference.

At the bottom, there is a status bar with a total of \$23.27 and a "Ship" button.

# 3.6 Adding TD Child Packages to a TD Master Shipment — Commercial Invoice Options

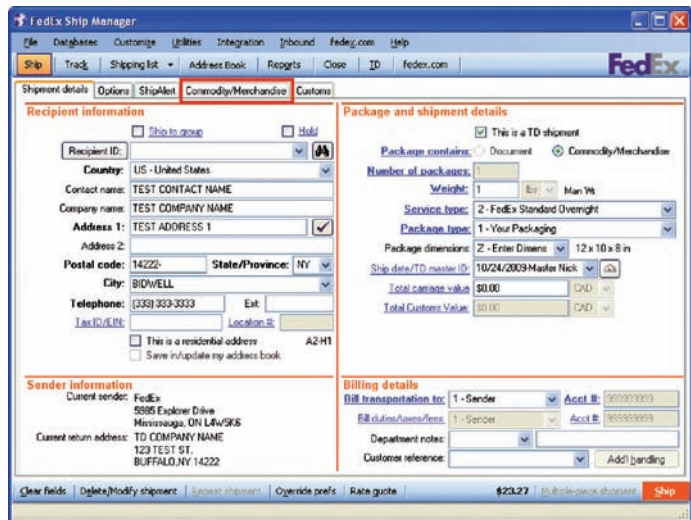
## TD Master Shipment — Commercial Invoice options are selected

The **Total Customs Value** field for each TD Child shipment is disabled on the FSM Ship screen and added at the time a commodity is attached to the shipment. Navigate to the **Commodity/Merchandise** tab to add commodities to TD Child packages.

## TD Master Shipment — Commercial Invoice options are not selected

The **Total Customs Value** field for each TD Child shipment is enabled. This is because the **Commodity** tab is disabled. Commodity data is only required if FSM is expected to generate commercial invoices.

Note that the **Total Customs Value** field is mandatory if the **Total Carriage Value** field has an entry greater than zero. The software ensures that the carriage value is less than or equal to the customs value for each shipment.



## 3.7 Modifying or Deleting a TD Master Shipment

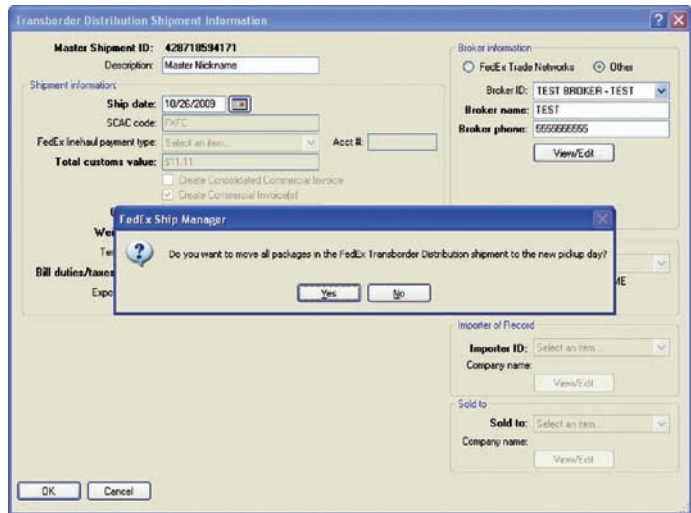
To modify a TD Master shipment:

- Access the TD Dashboard.
- Select the appropriate TD Master Shipment ID.
- Click the **Modify** button.
- The data elements that can be modified are as follows:
  - Description
  - Ship date
  - Export Permit #
  - Broker information
- Click the **OK** button.

If the ship date is altered, a dialog prompt will appear asking if you are sure that you would like to move all the TD Child packages in the TD Master shipment to the new ship date.

- If appropriate, click the **Yes** button.

FSM will then print new shipping labels with the updated ship date for all Express and Ground TD Child packages within the TD Master shipment. The shipper is responsible for re-labeling the TD Child packages.



## 3.7 Modifying or Deleting a TD Master Shipment continued ...

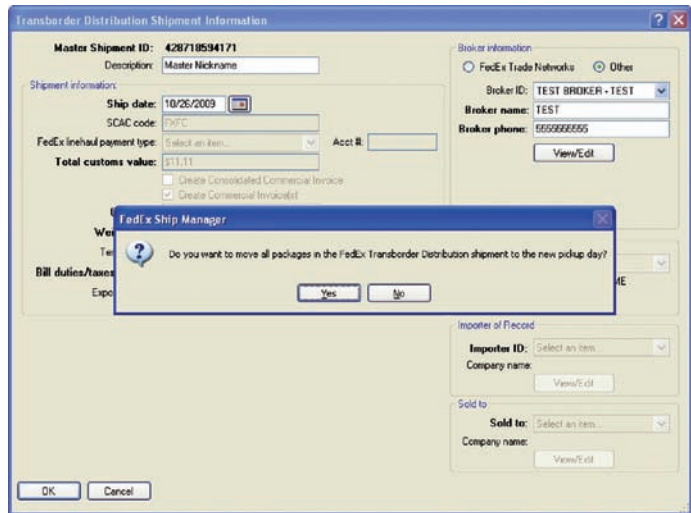
To delete a TD Master Shipment:

- Select the appropriate TD Master Shipment ID.
- Click the **Delete** button.

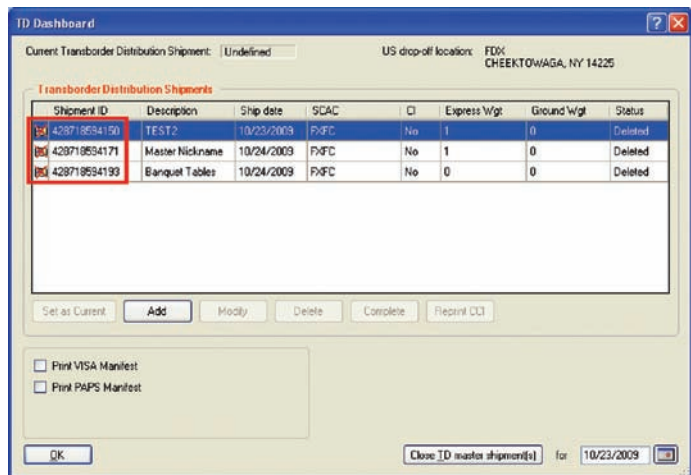
Note that deleting a TD Mater shipment deletes all TD child packages associated to it.

A dialog prompt will appear asking if you are sure that you want to delete the selected TD Master shipment.

- Click the **Yes** button.



Once the TD Master shipment has been deleted, FSM will return to the TD Dashboard displaying the deleted TD Master shipment with a red "X" and a Deleted status.



## 3.7 Modifying & Deleting TD Child Shipments continued ...

To modify or delete TD Child shipments, from the Ship screen, click the **Shipping List** button and select the TD option.

Highlight the TD Child shipment that you wish to change or cancel and click the **Modify** button or the **Delete** button.

### Modifying TD Child shipments:

When you click the **Modify** button, the Ship screen will appear displaying the TD Child shipment data, allowing you to modify it.

The screenshot shows the 'View Shipped List - Transborder Distribution' window. It features a 'Shipment Type' section with checkboxes for 'FedEx Express' and 'FedEx Ground'. A 'Packages Shipped' table shows counts for 'Total', 'Deleted', and 'Future' for both Express and Ground. Below is a search bar and a table of shipments. The 'Master Shipment ID' for the first row is highlighted in red.

Carrier	Tracking #	Master Shipment ID	Deleted	Ship Date	Service	Weight	Recipient Comp
Express	428718594274	428718594252	No	10/23/2009	FedEx Standard Overnight	30	Number One Con
Ground	593143669500032	428718594252	No	10/23/2009	FedEx Ground Service	10	Sunny Vacations
Express	428718594263	428718594252	No	10/23/2009	FedEx Priority Overnight	1	Number One Con

### Deleting TD Child shipments:

When prompted, ensure that the correct shipment has been selected and click the **Yes** button.

The screenshot shows the same 'View Shipped List - Transborder Distribution' window. In this view, the 'Deleted' column for the first row is highlighted in red, indicating that the shipment has been marked for deletion.

Carrier	Tracking #	Master Shipment ID	Deleted	Ship Date	Service	Weight	Recipient Comp
Express	428718594274	428718594252	Yes	10/23/2009	FedEx Standard Overnight	30	Number One Con
Ground	593143669500032	428718594252	No	10/23/2009	FedEx Ground Service	10	Sunny Vacations
Express	428718594263	428718594252	No	10/23/2009	FedEx Priority Overnight	1	Number One Con

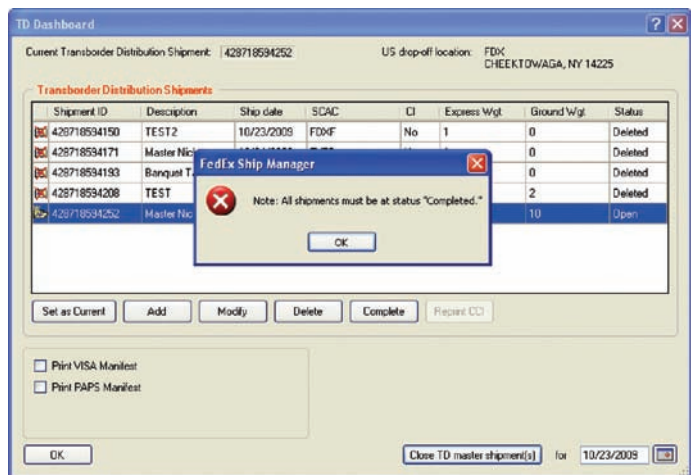
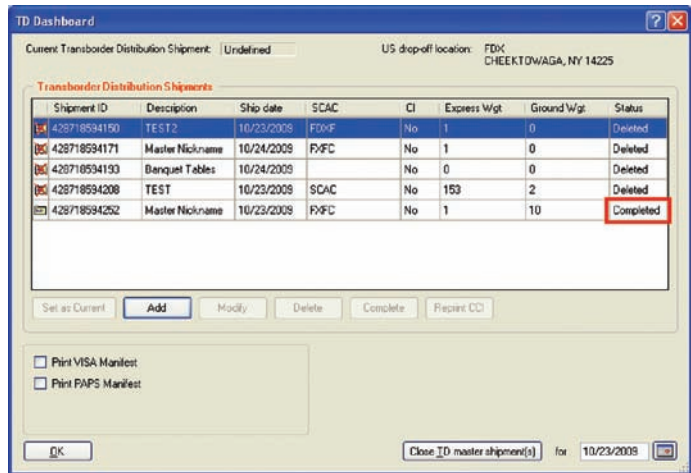
# 4.1 Completing a TD Master Shipment

To complete a TD Master shipment, from the Ship screen, click the **TD** button to reach the TD Dashboard:

- Highlight the TD Master shipment to be completed.
- Click the **Complete** button.
- The TD Master shipment will be marked as **Completed** in the Status column.

Note that you will not be able to add additional TD Child shipments to a Master ID that has a Completed status. The Completed Master ID is not uploaded until the **Close TD master shipment(s)** button is clicked. This applies to both current and future dated TD shipments.

Note that all TD Master IDs must have a Completed or Deleted status for the specified ship date before the TD Shipping Day can be closed.



## 4.2 TD Close/Ending a TD Shipping Day

Click the **Close TD master shipment(s)** button to close and upload all TD Master shipments with a Complete status.

The message **“FedEx Express Close in Progress ...”** is displayed while FSM communicates with FedEx® systems to upload all TD shipment data.

An Uploaded status will not appear until the TD Master shipment's ship date equals the current date. The upload of TD shipment data to FedEx systems will occur automatically at that time.

All TD Mater Shipment IDs will display on the dashboard until they are properly closed and their ship date has passed.

The following reports are generated while the close in progress message is displayed:

- Express Courier Report (if Express shipments exist).
- Ground Pickup Manifest (if Ground shipments exist).
- Courtesy TD Shipped to Detail report.

Once all TD Master and Child shipment data has been uploaded to FedEx systems, FSM will return to the TD Dashboard screen. The status **“Uploaded”** will appear beside all TD Master shipments that had a **“Completed”** status and a ship date that matched the close date.

TD Shipping is now complete.

For more information on TD services, please navigate to the following URL:  
[www.fedex.ca/directdistribution](http://www.fedex.ca/directdistribution)

