



# FedEx® Electronic Trade Documents Guide



## Overview

Welcome to the world of FedEx® Electronic Trade Documents. FedEx Ship Manager® Software provides this new, paperless international shipping solution to simplify your international shipping needs. Submit your international trade documentation electronically and you no longer have to print and attach trade documents to a shipment.

Capturing and sharing critical trade information as early as possible optimizes the customs clearance process. You can upload your Commercial Invoice and associated trade documents (e.g., other ancillary documents) for data entry and archiving.

The FedEx Electronic Trade Documents solution allows you to:

- Upload customs documents generated by FedEx, or upload your own international trade documents as files or images created on your own systems in your preferred software format (e.g., PDF, Microsoft® Word, Microsoft® Excel).
- Process trade documents without printing paper copies and placing them in the pouch attached to your shipment.
- Add a company letterhead and signature image to the Commercial Invoice/or Proforma Invoice.
- Gain additional time to resolve any difficulties with trade documents before shipment arrival.
- Set preferences to simplify completion of the Customs screen.
- Set defaults for the customs documents you upload.
- Use the feature as needed (can be turned on and off).

Before you begin, a FedEx account executive or FedEx customer technology consultant must turn on the feature's functionality via a utility.

## Recommendations

The FedEx Electronic Trade Documents feature is designed to perform optimally via a broadband Internet connection. Dial-up customers, with slower data-transfer rates, will experience longer processing times.

Also, to enhance clearance opportunities, FedEx strongly recommends uploading digital letterhead and signature images. (See pages 5-6.)

## Eligible Shipments

For a list of destination countries that accept electronic upload for Alpha Testing, Beta Testing, Target Release and General Release, go to the FedEx Ship Manager Software Beta Program screen [fedex.com/us/automation/fsm/betaprogram.html](https://www.fedex.com/us/automation/fsm/betaprogram.html). More destination countries will be added during Beta Testing and at General Release.

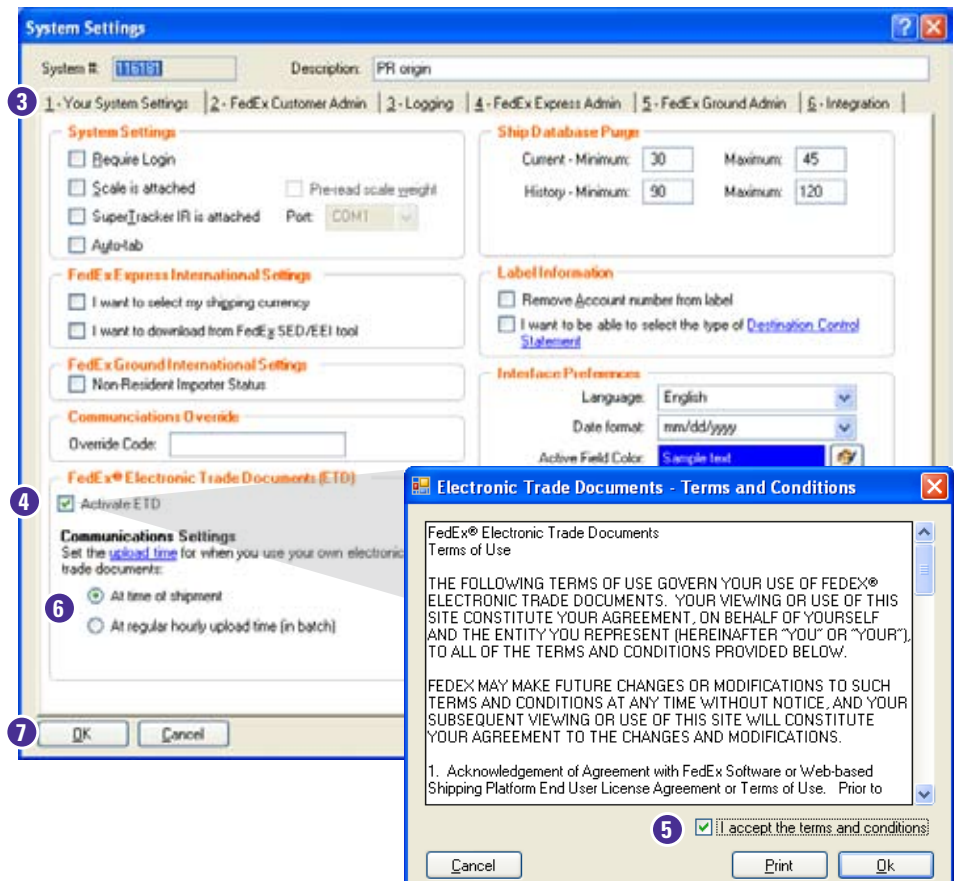
Also, please note that this feature is not available at this time for FedEx International Ground®, group shipping, future day, dangerous goods, dry ice, FedEx International Priority DirectDistribution® or FedEx® Transborder Distribution shipments.

## Enabling FedEx® Electronic Trade Documents

After functionality has been turned on, you can enable it as follows:

1. Select **System Settings** from the Customize drop-down menu. The System Settings - System/Account screen displays.
2. Select the appropriate System # and click **Modify**. The System Settings screen displays.
3. Click the **1-Your System Settings** tab.
4. In the FedEx® Electronic Trade Documents (ETD) section at the bottom of the screen, select the **Activate ETD** check box. The Electronic Trade Documents - Terms and Conditions screen displays. If needed, you can deactivate the feature. Simply deselect the **Activate ETD** check box.
5. Click the **I accept the terms and conditions** check box and click **OK**.
6. In the Communications Settings area, click **At time of shipment** or **At regular hourly upload time (in batch)**. The option **At time of shipment** is the default and is the preferred setting. See the Uploading Options section on page 14 for more information.
7. Click **OK**. A dialog displays advising you that certain countries require a letterhead and signature on the Commercial Invoice. You can select to go to the International Preferences screen now or later to upload images. Many countries require the letterhead and signature for electronic documents, so it is important that you upload these prior to processing shipments.

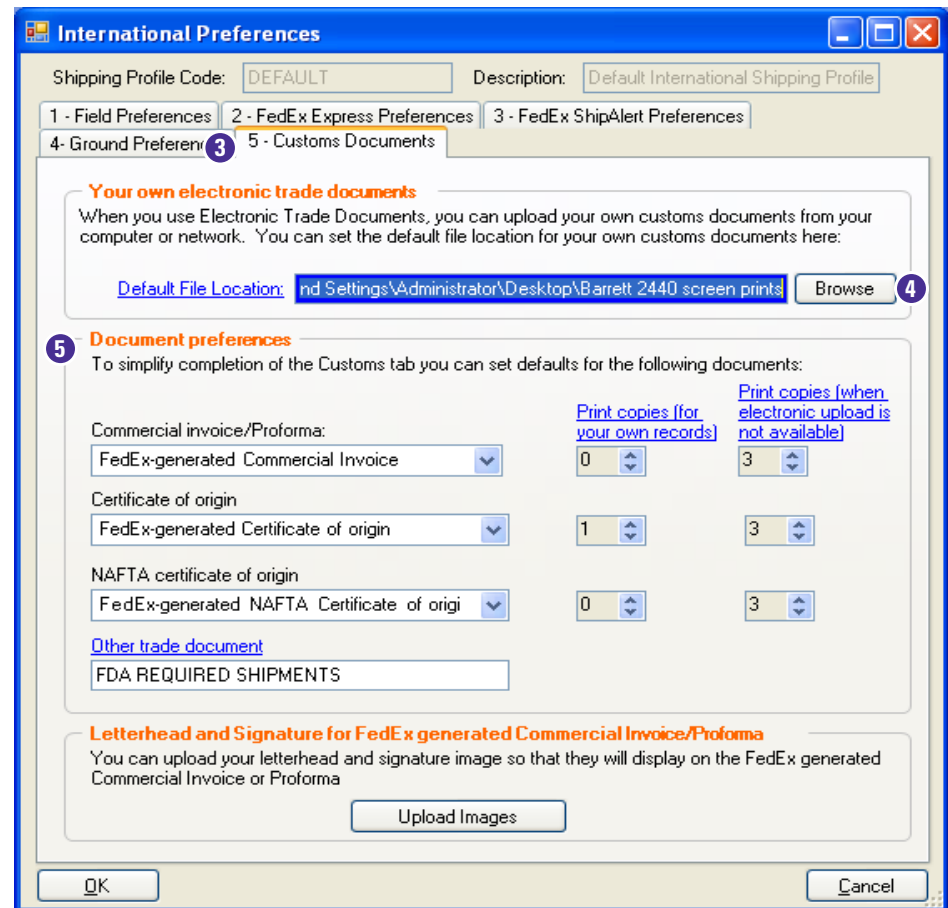
8. If you choose to provide images later, the dialog closes. If you choose to go to the International Preferences screen now, the dialog closes and the International Preferences screen for FedEx Electronic Trade Documents displays.



## Setting Preferences

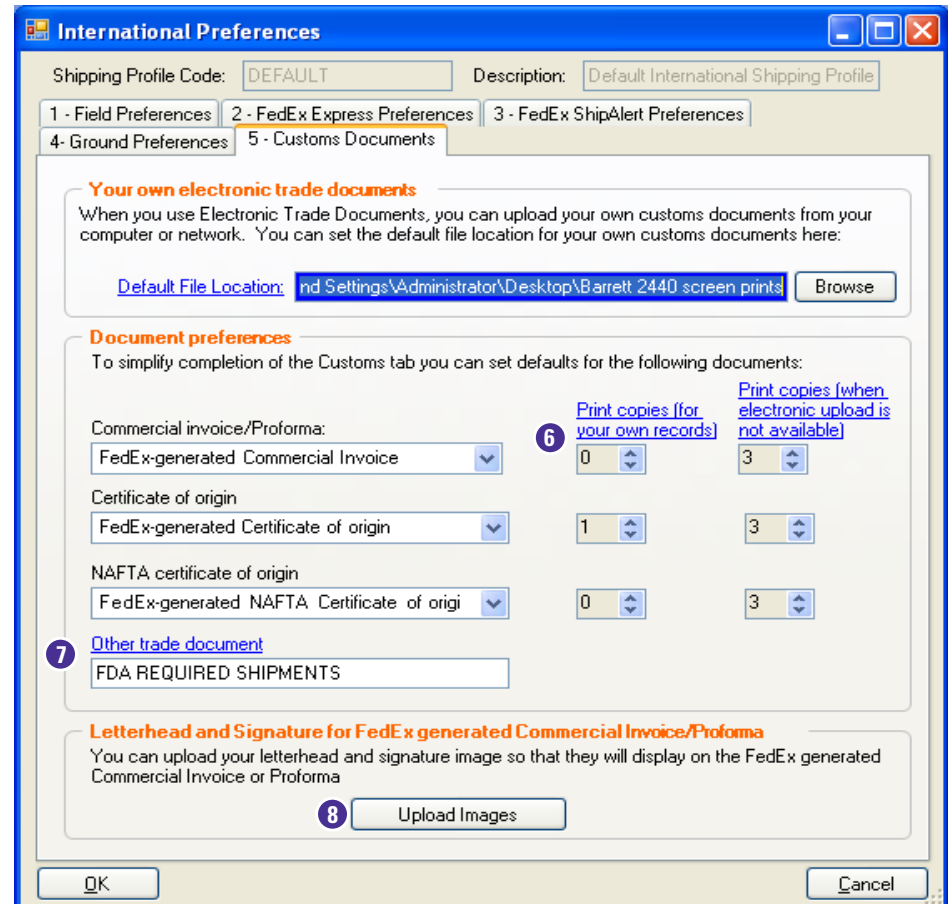
To set preferences, follow these steps:

1. Select **Shipping Profiles** from the Customize menu. The Shipping Profiles screen displays.
2. Select the **Default International Shipping Profile** and click **View/Edit**. The International Preferences screen displays.
3. Click the **5-Customs Documents** tab.
4. If you plan to upload your own electronic documents and save these documents in a particular file folder, you can set a default to go directly to that file folder. In the Your own electronic trade documents section, click **Browse** and select a default file location. (This will be used when you are browsing to select your own documents for uploading.)
5. In the Document preferences section, select your electronic document preferences. This allows you to indicate whether you will use your own documents or documents generated by FedEx.



## Setting Preferences, continued

6. If you select documents generated by FedEx, you have the option of indicating how many copies to print.
  - Under Print copies (for your own records), you can select the number of copies you would like to print for your own internal records when you process a shipment. It is not necessary to print and attach these documents to the package.
  - Under Print copies (when electronic upload is not available), you can select the number of copies you would like to print for shipments where the feature is not used. Since the feature is not available for all countries and services at this time, a message displays on the Customs screen advising you when the feature is not available. For these shipments, you need to print paper copies of the customs documents and place them in the pouch attached to your shipment.
7. If you have another trade document that you usually include with your shipments, you can enter the document name in the Other trade document section. That document name then appears on the Customs screen as a visual reminder that this is a document you may need to include with certain shipments. If you choose to provide images later, the dialog closes. If you choose to go to the International Preferences screen now, the dialog closes and the International Preferences screen displays.
8. In the Letterhead and Signature for FedEx generated Commercial Invoice/Proforma section, click **Upload Images**. The Upload images screen displays.



*Note: Before uploading your letterhead and signature images, save your images (as GIF, JPG or PNG) on your system.*

## Setting Preferences, continued

- Use a digital image of your letterhead/signature or scan these images. If you scan the images, crop them to the appropriate sizes;

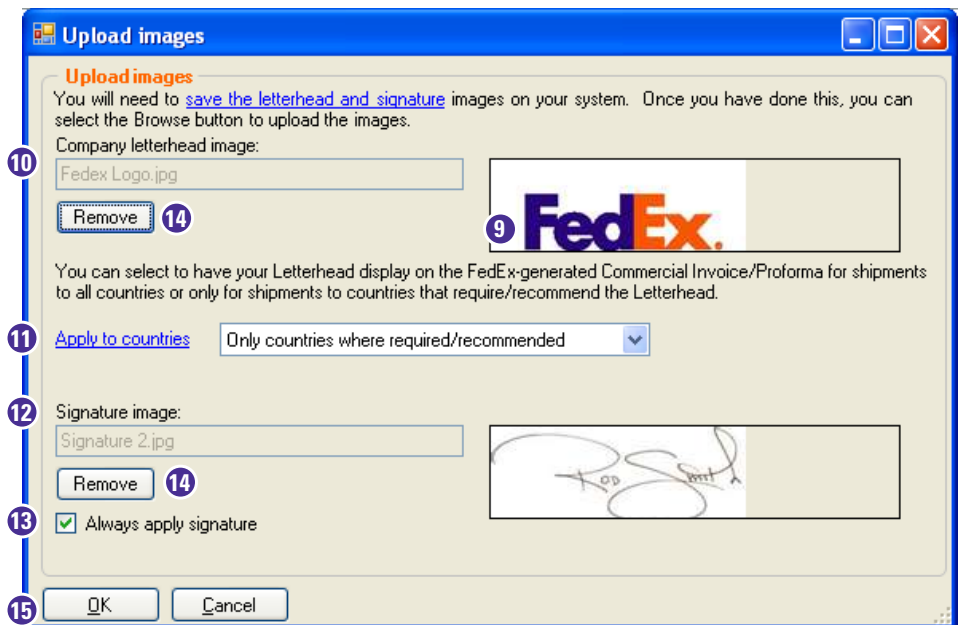
- Letterhead image – Maximum of 7.5 x 1.6 inches.
- Signature image – Maximum of 3.5 x 0.5 inches.

*Note: Images larger than these dimensions are automatically resized to fit and could be distorted.*

- In the Company letterhead image section, click **Browse** to select the appropriate letterhead image file.
- For your letterhead, select how to apply the image from the **Apply to countries** drop-down menu. Apply only to countries where a letterhead is required or recommended, or apply to all shipments.
- In the Signature image section, click **Browse** to select the appropriate signature image file.
- Select the **Always apply signature** check box to apply the signature to all shipments.
- If you want to remove the image, click **Remove**. If you want to replace the image, click **Remove** and then click **Browse** to select a new image.

*Note: If you are currently printing the Commercial Invoice generated by FedEx on your letterhead by placing your stationery in the printer, you need to revise this setting. Select **Forms** from the Customize drop-down menu. When the Forms Settings screen displays, select **Reports** in the Form settings section. In the Commercial Invoice letterhead settings Paper type section, click the **Plain paper** radio button. Click **OK**.*

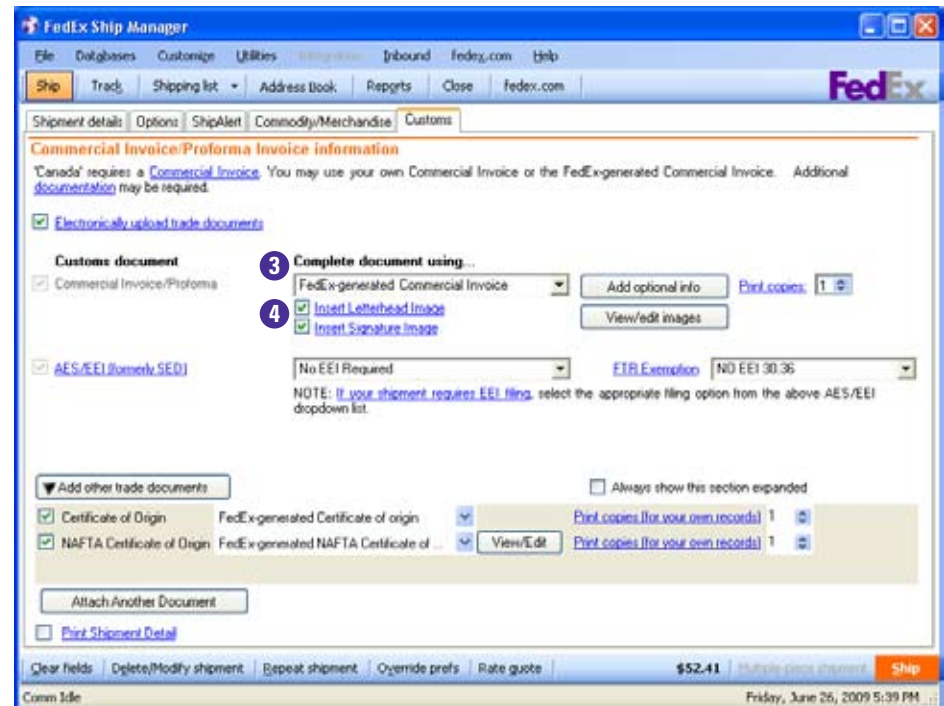
- To save your preferences, click **OK** on this screen and all subsequent Shipping Profile screens.



## Processing Shipments

To process shipments using your FedEx Electronic Trade Documents preferences, follow these steps:

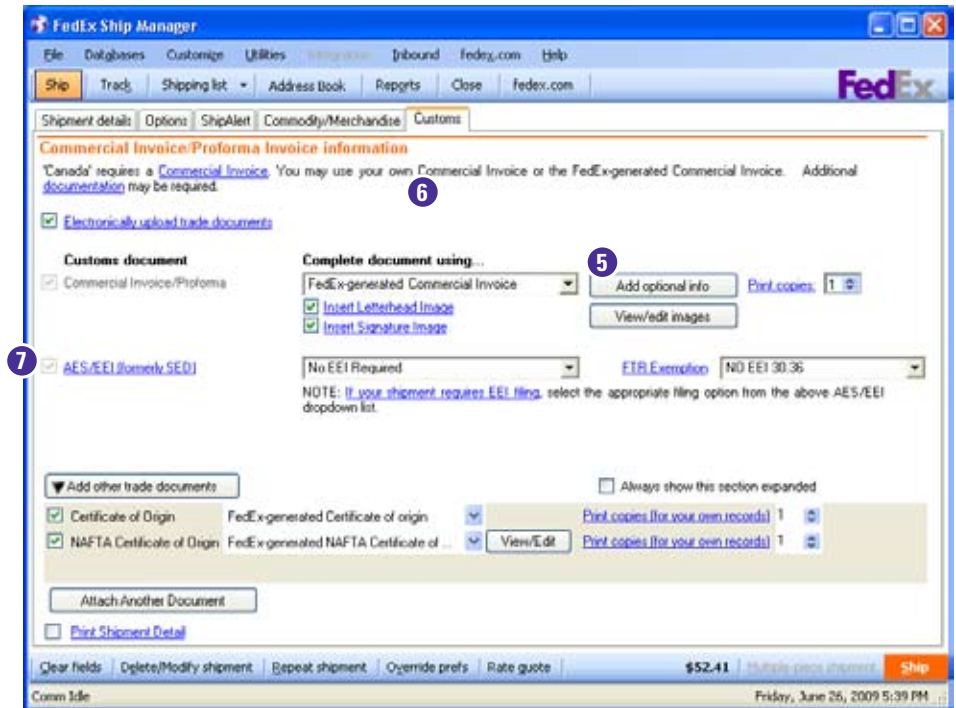
1. Complete the Shipment details, Options and Commodity/Merchandise screens.
2. On the Customs screen, the following messages can display:
  - The Commercial Invoice message displays at the top of the screen to provide you with information on specific requirements for the destination country.
  - If the shipment is eligible, the Electronically upload trade documents check box displays below this message and defaults to checked.
  - If the destination is not eligible, a statement displays in place of the Electronically upload trade documents check box. This statement provides you with information on why this shipment is not eligible and the upload options do not display.
3. You can select **FedEx-generated Commercial Invoice** or **FedEx-generated Proforma Invoice** from the Complete document using drop-down menu.
  - For eligible shipments – the Print copies drop-down menu allows you to print copies for your own record.
  - For shipments not eligible – the Print copies drop-down menu allows you to print copies to attach to the package.
4. If you set preferences for your images, the Insert Letterhead Image and Insert Signature Image check boxes are selected automatically. If they are not selected, select these check boxes as applicable. Click **View/edit images** to select or change the image.



## Processing Shipments, continued

5. Click **Add optional info** to provide additional information. You can perform several actions, including selecting terms of sale, entering additional charges, and including a NAFTA statement. Click **View/Edit importer** to change the importer information.
6. If you select to upload your own documents, you can browse and upload those documents as needed.
7. You can also select from the following export documents:
  - AES/EEI (formerly SED) – AES is Automatic Export System, EEI is Electronic Export Information and SED is Shipper’s Export Declaration. Since the AES/EEI (formerly SED) check box is always checked, process your shipment as follows:
    - If your shipment requires Electronic Export Information (EEI) filing – Since No EEI Required is the default option, select the filing option and citation type and enter the citation number.
    - If your shipment does not require EEI filing – Select **No EEI Required** (default option) from the drop-down menu and then select the appropriate FTR exemption number from the FTR Exemption drop-down menu.
    - Export Permit # (for Canada-origin shipments).
    - B13A (for Canada-origin shipments).

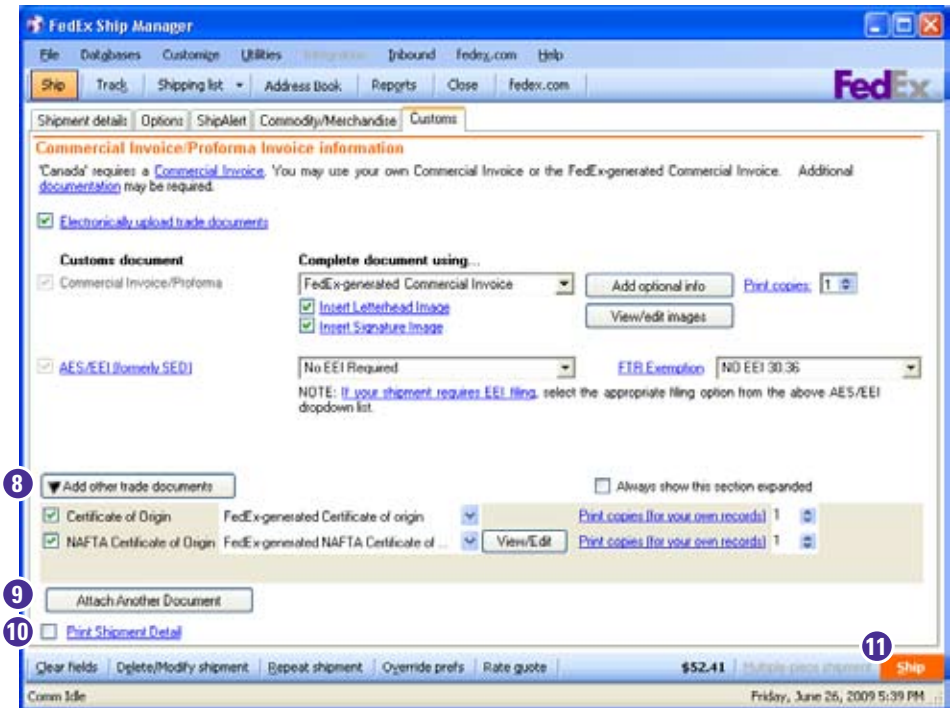
*Note: These documents must be processed in the same manner as today. They cannot be electronically uploaded with the shipment like other documents.*





## Processing Shipments, continued

8. Click **Add other trade documents** to display the following document options. For eligible shipments, each option contains a drop-down menu allowing you to indicate whether you are using your own document or a FedEx version of the document. For FedEx documents, you can select the number of copies to print.
  - Certificate of Origin.
  - NAFTA Certificate of Origin – If you select **FedEx-generated NAFTA Certificate of origin** from the drop-down menu, click **View/Edit** and provide the required information.
9. For eligible shipments, you can attach another document that you have saved on your own system by clicking **Attach Another Document** and selecting the appropriate document from the resulting screen.
10. Select the **Print Shipment Detail** check box to print the shipment details.
11. Click **Ship** to process your shipment.



## Processing Shipments, continued

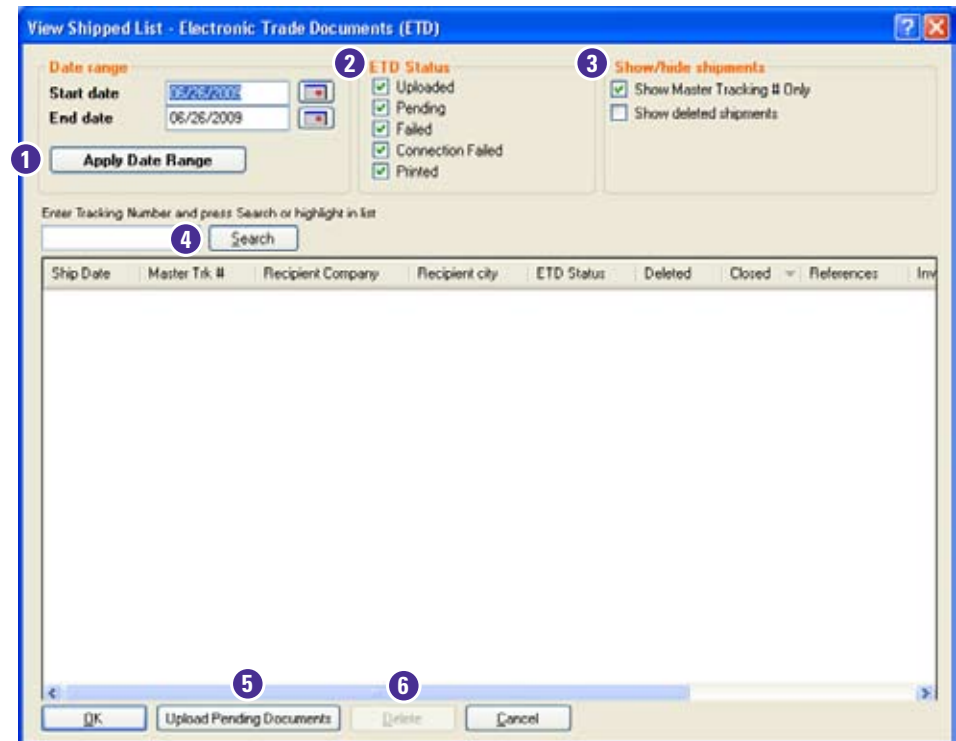
12. If you selected **At time of shipment** on the System Settings screen, the system attempts to upload the designated documents.
  - If the upload is successful, a shipping label is printed.
  - If an upload is not successful, a message displays explaining why the upload failed and allows you to try again, revise the selections or manually print and attach your documents.
13. If you selected **At regular hourly upload time (in batch)** on the System Settings screen, the following options are available:
  - System displays a warning message at time of upload if one or more shipments contain documents that did not upload. You have the option to go the FedEx Electronic Trade Documents Shipped List then or choose to complete the shipment later.
  - Shipments display in the FedEx Electronic Trade Documents Shipped List with a status of either Uploaded, Pending, Failed or Printed.
  - You can access the FedEx Electronic Trade Documents Shipped List to view the status of uploads.

*Note: If an upload is not successful, click the Failed status link. A message displays explaining why the upload failed and allows you to complete the shipment later or manually print the label and your documents to give to the courier. Once you print the documents, the status changes to Printed.*

## FedEx Electronic Trade Documents Shipped List

To access the FedEx Electronic Trade Documents Shipped List, select **ETD** from the Shipping list menu. The View Shipped List - Electronic Trade Documents (ETD) screen displays. Your shipments display on both the FedEx Electronic Trade Documents and International shipped lists.

1. In the Date range section, select the date range for shipments to display and click **Apply Date Range**.
2. Check the status options to display in the ETD Status section. Click the status link in the ETD Status column to see a list of documents attached to the shipment.
3. Check the shipment options in the Show/hide shipments section to display.
4. Enter a tracking number in the Search field and click **Search** to highlight the number in the list.
5. If you want to manually upload documents now that are scheduled to upload at the regular hourly upload time (in batch), click **Upload Pending Documents**.
6. Highlight the shipment and click **Delete** to delete it. The status changes to Deleted on both lists.



## Checklist for Uploading FedEx-generated Commercial Invoice or Proforma Invoice

If you choose to upload the FedEx-generated Commercial Invoice or Proforma Invoice, please review the following checklist.

Most countries that accept FedEx Electronic Trade Documents shipments either recommend or require that the Commercial Invoice or Proforma Invoice be signed and on your company letterhead. Upload your letterhead and signature before you begin using this feature.

- If you are currently printing the Commercial Invoice generated by FedEx on your letterhead by placing your stationery in the printer, you need to revise this setting. Select **Forms** from the Customize drop-down menu. When the Forms Settings screen displays, select **Reports** in the Form settings section. In the Commercial Invoice letterhead settings Paper type section, click the **Plain paper** radio button. Click **OK**.
- This feature is not available for all countries and services at this time. A message displays on the Customs screen advising you when it is not available. For these shipments, you need to print paper copies of customs documents and place them in the pouch attached to your shipment.

Optional settings to save you time are as follows:

- You can set your preferences so that the document generated by FedEx is always selected for you on the Customs screen.
- If you need to keep copies of the Commercial Invoice generated by FedEx for your own internal records, you can set a preference for the number of copies you want to print.
- You can set a preference for the number of copies you want to print when the feature is not available so that it is always selected for you on the Customs screen.

## Uploading Your Own Documents

If you wish to upload your own documents instead of uploading the documents generated by FedEx, please review the following checklist:

- You must have access to those documents via hard drive, USB or other means to process your shipment using FedEx Ship Manager Software.
- You need to ensure that you are using unique file names for your documents, so the person shipping can easily identify and select the correct documents for each shipment. For example, you might want to use a unique PO Number or reference number and possibly include the ship date or other information in the file name. If an incorrect document is uploaded, customs delays may occur.
- You need to set up a process for printing and attaching your own documents in situations where the FedEx Electronic Trade Documents feature is not allowed or the document upload fails.
- If you keep all of your documents in one file folder, you can use the default file setting in the Customs International Profile so the shipper is taken directly to that file when they click **Browse** on the Customs screen.
- If you do not keep all of your documents in one file folder, do not use the default setting. The shipper is always taken to the last selected file path.
- For countries that require a letterhead and signature, your letterhead and signature must be included on the document you are uploading.

## Uploading Options

When enabling the system for the FedEx Electronic Trade Documents feature, you have two upload options: At time of shipment (preferred option) or At regular hourly upload time (in batch). Select At regular hourly upload time (in batch) only if you have discussed this option with your FedEx account executive or FedEx customer technology consultant.

### At time of shipment

- This is the preferred setting.
- Gives you immediate confirmation that your documents have been successfully uploaded.
- Allows you to get immediate feedback on any problems with uploading your documents.

If upload issues occur, you can:

- Correct the problem and complete the shipment.
- Put the shipment in the Hold file to research the problem.
- Manually print and attach the documents to the shipment.

### At regular hourly upload time (in batch)

- Gives you a warning message at the time of the hourly upload if there was a document upload failure for one or more of your shipments.
- If you do not complete the shipment when you receive the warning message, you must remember to review the FedEx Electronic Trade Documents Shipped List in time to complete the process before the courier arrives.

- If a document upload failure occurs, you must manually print the label and all trade documents for that shipment and hand them to the courier at time of pickup.
- If a document upload failure occurs and you do not complete the paperwork in time for the pickup, you must contact FedEx Customer Service at **1.800.GoFedEx 1.800.463.3339** for instructions on faxing the label and paperwork.

*Note: Customs delays may result if there is a document upload failure and the label and documents are not handed to the courier at pickup.*

## Original Documents Required for Clearance

Although the destinations enabled for FedEx Electronic Trade Documents can clear customs with a paperless Commercial Invoice, some commodities, values or quantities may require an original invoice, license or permit.

It is the responsibility of the shipper to know when an original document is required and to place the original document in the pouch on the package.