

FedEx Shipping User Guide

February 2026

4800 Falls of Neuse Road, Suite 600 | Raleigh, NC 27609

p (800) 848-0143 | f (919) 755-8350 | www.softprocorp.com

Copyright and Licensing Information

Copyright © 1987–2025 by SoftPro, LLC

All rights reserved.

No part of this publication may be reproduced in any form without prior written permission of SoftPro. For additional information, contact SoftPro, 4800 Falls of Neuse Road Suite 600, Raleigh, NC 27609.

Microsoft and Windows are registered trademarks of Microsoft Corporation in the United States and/or other countries. Crystal Reports is a registered trademark of SAP AG. HP LaserJet is a registered trademark of Hewlett Packard Development Company, RealEC Technologies, Inc. is majority owned by ICE Mortgage Technology, Inc. All brands and product names are trademarks or registered trademarks of their respective companies.

IMPORTANT NOTICE – READ CAREFULLY

Use of this software and related materials is provided under the terms of the SoftPro Software License Agreement. By accepting the License, you acknowledge that the materials and programs furnished are the exclusive property of SoftPro. You do not become the owner of the program but have the right to use it only as outlined in the SoftPro Software License Agreement.

All SoftPro software products are designed to ASSIST in maintaining data and/or producing documents and reports based upon information provided by the user and logic, rules, and principles that are incorporated within the program(s). Accordingly, the documents and/or reports produced may or may not be valid, adequate, or sufficient under various circumstances at the time of production. UNDER NO CIRCUMSTANCES SHOULD ANY DOCUMENTS AND/OR REPORTS PRODUCED BE USED FOR ANY PURPOSE UNTIL THEY HAVE BEEN REVIEWED FOR VALIDITY, ADEQUACY AND SUFFICIENCY, AND REVISED WHERE APPROPRIATE, BY A COMPETENT PROFESSIONAL.

Table of Contents

History	4
Introduction	5
Opening the FedEx Integration	6
End User License Agreement (EULA).....	6
Order Linking.....	6
Add Account.....	7
Authentication.....	8
Shipping Preferences	10
Shipper Information	10
Shipping Default Preferences.....	10
Manage Accounts Screen.....	11
Manage Transactions.....	12
Create Shipment	12
Compare Rates Screen	13
Commodity Details Screen.....	14
Ground Economy Options Screen.....	14
More Options Screen	15
Shipment Details Screen	16
Appendices.....	18
Appendix A: Shipping to International Addresses.....	18
Appendix B: FedEx One Rate®	19

History

Date	Version	Details
03.24.2025	v2.0	Incorporated enhancements: <ul style="list-style-type: none">- SOAP to RESTful API Services re-write- shipping to US Territories (international)- not populating shipping address when the address is not supported
08.06.2025	V3.0	Incorporated enhancements: <ul style="list-style-type: none">- Enhancements to Compare Rates screen- Enhancements to One Rate functionality
01.06.2026	V3.1	Further refinements
02/17/2026	V4	Refinements based on Pilot and Webinar

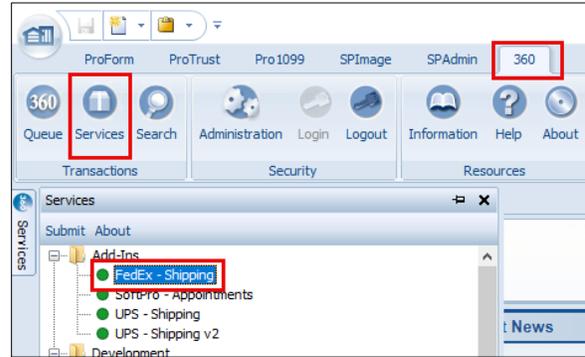
Introduction

SoftPro 360 users can prepare FedEx shipment labels directly from ProForm to maintain a streamlined closing process, save time and be more efficient. The SoftPro Shipping Service seamlessly populates the name, address and phone number of the contacts in your ProForm order, allowing you to quickly select a contact and create a FedEx Shipping Label without ever leaving ProForm.

Opening the FedEx Integration

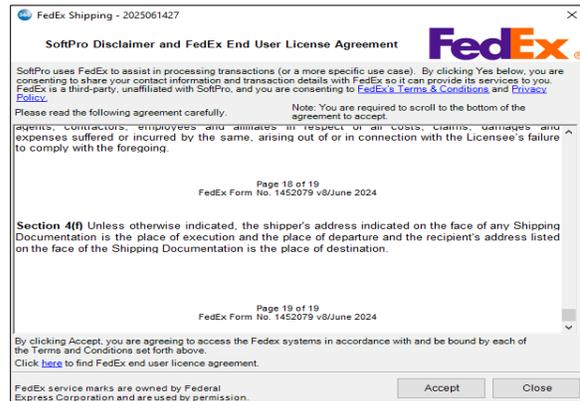
To open the FedEx integration, follow these steps:

1. Select the **Services** tab
2. Click the **Add-Ins** folder to expand
3. Double-click **FedEx - Shipping**



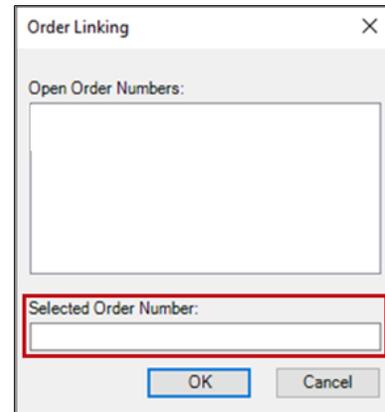
End User License Agreement (EULA)

The first time you log in, an **End User License Agreement** is displayed. Scroll to the bottom of the agreement, at which point the Accept button will be enabled. Press **Accept** to continue or click the **Here link** for more information.

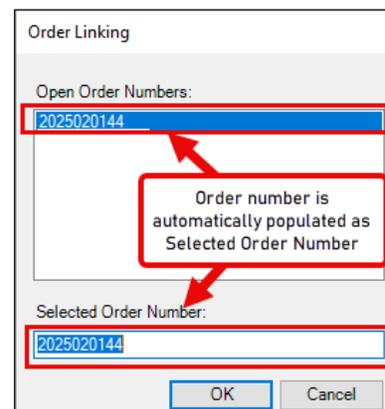


Order Linking

After accepting the EULA, the **Order Linking** window will be displayed. If no order is open, enter the corresponding order in the **Selected Order Number** field.



If a single order is open, the order number is shown in the **Open Order Numbers** field and the **Selected Order Number**. NOTE: The **Selected Order Number** field can be overwritten with an order that is not open.



If multiple orders are open, all order numbers appear in the **Open Order Numbers** field, and the first order is displayed in the **Selected Order Number** field. Highlight an order in the **Open Order Numbers** field to select the applicable order

Press the **OK** button to continue

Add Account

The first time the integration is opened, or if no shared accounts exist, you must add your FedEx shipping account to the **Add Account** screen.

Your **FedEx Account Number** and a **FedEx Account Name** are required as indicated by the red asterisks. Checking the **Shared Account** check box allows users using the same SoftPro license to access the same FedEx Account through the FedEx Shipping product. Checking the **Default Account** box ensures that this account is the default if you add multiple accounts to the integration.

The **Contact Information** must match the address listed with FedEx for the account number. By checking the **Same as Shipping Address** check box, the information from the **Shipping Preferences** screen populates the given fields.

Please note that **Company Name** can be up to 24 characters long.

When all required information has been entered, the **Next** button will be enabled. Press it to continue or the **Cancel** button to close the integration.

Authentication

Multi-factor Authentication is necessary to complete the process of adding a shipping account to the FedEx integration.

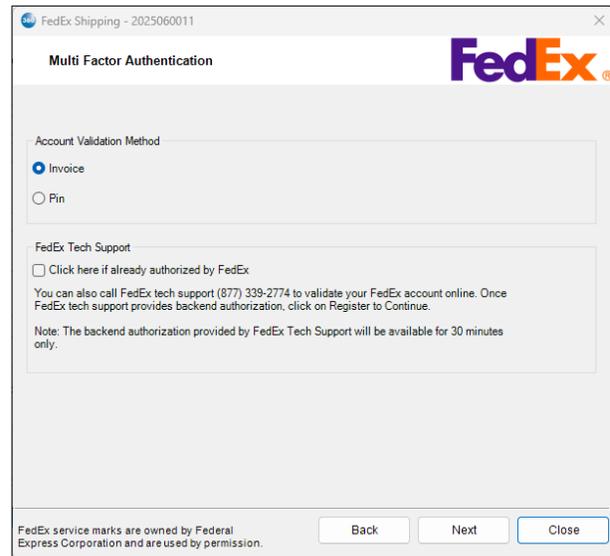
The three methods of account validation are:

- **Invoice**
- **PIN**
- **FedEx Tech Support Validation**

To return to the previous screen, press the **Back** button.

To cancel and exit the integration, press the **Cancel** button.

To continue, select a validation method and press the **Next** button.



Invoice Validation

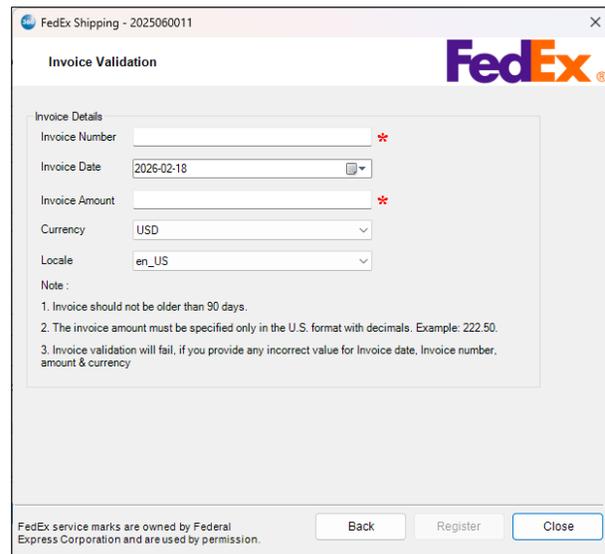
To validate an account using an invoice, enter the following information from a valid invoice for the shipping account entered that is no older than 90 days:

1. **Invoice Number**
2. **Invoice Date**
3. **Invoice Amount**
4. **Currency**
5. **Locale**

To return to the previous screen, press the **Back** button.

To cancel and exit the integration, press the **Cancel** button.

To continue, press the **Register** button.



PIN Validation

To validate an account using a PIN, you must have access to the mobile phone or email address associated with the account.

Select one of three PIN Validation Options

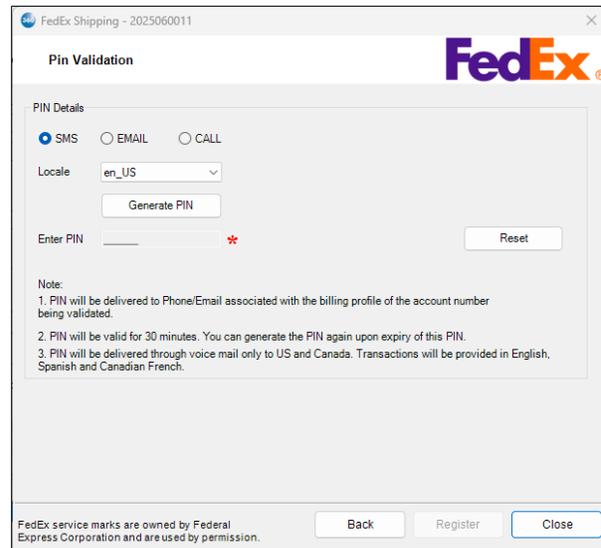
1. **SMS**
2. **EMAIL**
3. **CALL**

Click **Generate PIN**

When the PIN is received, enter it in the **Enter PIN** field and click the **Register** button to continue.

To return to the previous screen, press the **Back** button.

To cancel and exit the integration, press the **Cancel** button.



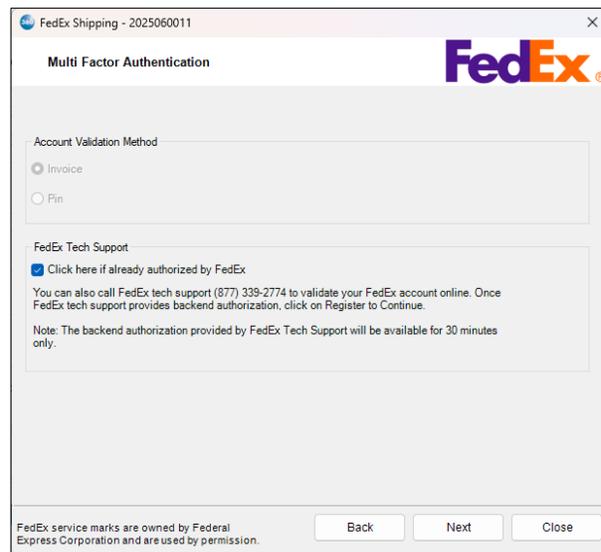
FedEx Tech Support Validation

To authenticate using a call to FedEx Tech Support, use these steps:

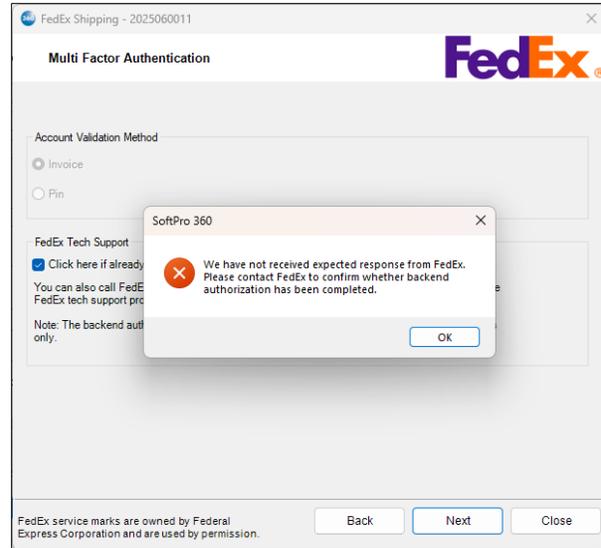
1. Call the FedEx Tech Support number (currently 877-339-2774)
2. When the system answers, select option **4 – Web Services and API**
3. The tech support agent will ask for:
 - a. Account Number
 - b. Account Name (must match exactly)
 - c. Account Address (must match exactly)
 - d. Invoice Number
 - e. Invoice Amount
 - f. Invoice Date (within 90 days)
4. When the tech support agent authorizes your account, you will have 30 minutes to press **Next** and complete the account registration.

To return to the previous screen, press the **Back** button.

To cancel and exit the integration, press the **Cancel** button.



If authorization has not been received, an error message will be displayed. Press the OK button to continue and try the authorization again.



When registration is complete, you will be taken to the [Shipping Preferences](#) or [Add Account](#) section depending upon which screen is displayed.

Shipping Preferences

After adding and authenticating an account for the first time, the Shipping Preferences screen is displayed. Default shipping preferences, including shipping information (pre-populated from the the contact information based on their SoftPro 360 registration), and shipping default preferences are stored in this screen.

Shipper Information

Shipper information is defaulted from the contact information but can be changed on this screen. This will be the default shipper information for future shipments.

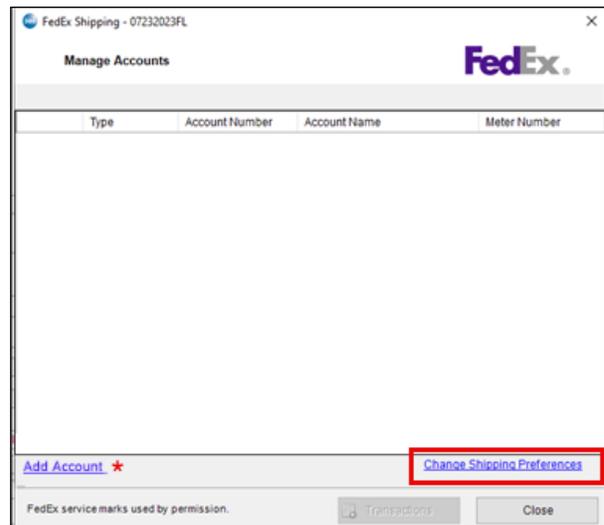
Shipping Default Preferences

Select shipping preferences to be defaulted in future shipments.

- **Delivery Options**
Delivery options to default
- **Service Type**
The shipping service type to default. This option can be changed when creating a shipment
- **Shipment Weight**

- **Address Validation:** An automatic function that verifies the city, state and postal code combination of any U.S. Ship To address. If FedEx is unable to validate the combination, you have the option to use a suggested address from an address database, revise the original address, or use the original address.
- **Email Notification**
Multiple options can be selected:
 - **Ship Notification** indicates that the shipment information has been sent to FedEx.
 - **Delivery Notification** indicates when the shipment has been delivered.
 - **Tendered Notification** indicates when FedEx has picked up a shipment.
 - **Exception Notification** indicates any exceptions that may cause a delivery delay.

NOTE: You can return to this screen by clicking the **Change Shipping Preferences** link on the **Manage Accounts** screen

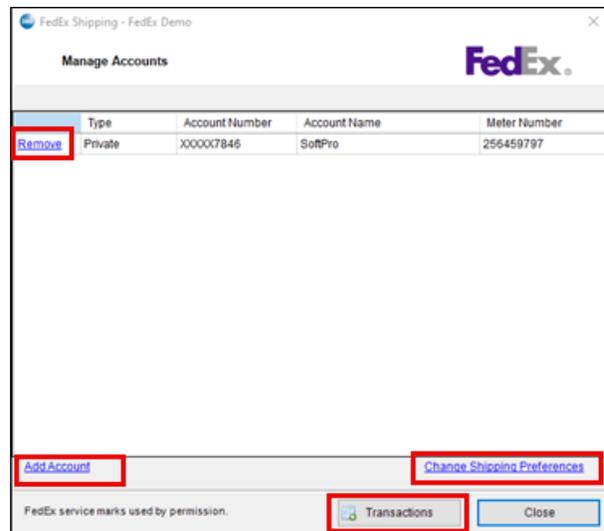


Manage Accounts Screen

The **Manage Accounts** screen allows you to add additional FedEx Accounts, view or remove current FedEx Accounts, and Change Shipping Preferences.

Clicking the **Transactions** button on this screen allows you to view the **Manage Transaction** screen.

Clicking the **Change Shipping Preferences** button on this displays the **Shipping Preferences** screen.

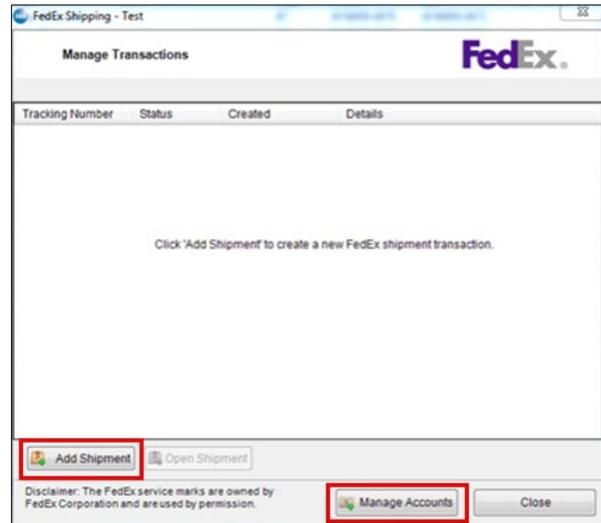


Manage Transactions

For subsequent uses of FedEx Shipping when a shared account already exists, the **Manage Transactions** screen is the first screen displayed.

The **Manage Transactions** screen displays all shipments created for the linked ProForm order.

To create a shipping label, click the **Add Shipment** button.



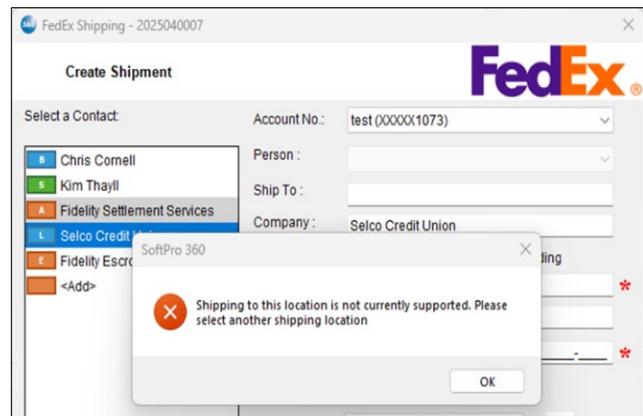
Create Shipment

The **Create Shipment** screen lists the contacts entered in the linked ProForm order, with the **Ship To** information (name, address, phone number, etc.) being populated from the first contact.

Any of the contacts can be selected for shipment if the address is supported by the integration.

If the selected contact has an address that is not supported, the address fields are populated but greyed out and a message displays stating: **Shipping to this location is not currently supported. Please select another shipping location.**

The FedEx integration is designed to support shipping to certain international addresses. For more information, see [Appendix A](#).



Required address information fields are denoted by a red asterisk.

- **Person**
Drop-down field allows selection of individuals associated with the contact and defaults from the first individual/person
- **Ship To**
This field defaults from the Person or Company field in the contact but may be overwritten

- **Company**
Defaults from the Company field in the contact record but may be overwritten
- **Address Type**
- **Address 1 ***
- **Address 2 ***
- **City/State/Zip ***
- **Phone ***

In addition to address information, the **Create Shipment** screen contains other data necessary to create a valid FedEx® shipment.

- **Account No.** - select the FedEx account number to use for the shipment
- **Package Type** - select the package type for this shipment.
- **Lb. (weight in pounds)** - approximate weight of the shipment including packaging
- **Service Type** - type of shipping service desired. Options include:
- **Options**
 - FedEx One Rate®
FedEx One Rate® allows you to ship packages using FedEx 2Day® shipping anywhere in the U.S. for a flat rate. FedEx® packaging must be used, but a variety of sizes are available.
 - Return Label
 - Residential Delivery
 - Validate Address

Compare Rates Screen

Clicking the **Compare Rates** link opens the **Service Type Rate Comparison** window. This allows you to view estimated rates and delivery dates and times for available service types between the origin and destination.

FedEx 2Day® Rate

In some cases, even if the FedEx One Rate® box is unchecked, the Net Charge value will reflect the FedEx One Rate®. In some cases, this is even true if you have selected Your Packaging as a Package Type.

Please see [Appendix B: FedEx One Rate®](#) for more information.

Arrives On	Delivered By	Net Charge
Fri, Feb 20	5:00 PM FedEx Priority Overnight®	\$68.82
Mon, Feb 23	5:00 PM FedEx 2Day®	\$12.95
Tue, Feb 24	5:00 PM FedEx Express Saver®	\$12.95

Clicking the **Close** button returns you to the **Create Shipment** screen.

Commodity Details Screen

Click the **Commodity** link to complete the required **Commodity Details** information for international shipments.

When shipping with **FedEx International Economy®**, **FedEx International Priority®** or **International Priority®** service types, the following fields are available (* = required):

- **Duties Payment**
 - Payment Type *
- **Commodity**
 - Unit Price *
 - Customs Value *
 - Quantity *
 - Quantity Units
 - Weight *
 - Country of Manufacture
 - Description *

The **Close** button is enabled once all required information has been entered. Clicking the **Close** button returns you to the **Create Shipment** screen.

Ground Economy Options Screen

Click this link when FedEx Ground® Economy is selected as a service type to display a screen containing mandatory information.

- **Payment Type**
 - Sender
 - Third Party
- **Indicia**

This represents the type of Ground Economy shipment
- **Ancillary Endorsement**

This option is applicable only when the FedEx Ground® Economy (under 1 lb.) and FedEx Ground® Economy Bound Printed Matter options are selected.
- **Hub ID**

This field is mandatory and is specific to each shipper address. Contact FedEx for more information.
- **Special Services**

Clicking the **Close** button returns you to the **Create Shipment** screen.

More Options Screen

The **More Options** link provides additional options that can be selected on a per shipment basis.

Additional Service Options

- Ship Date
- Saturday Pickup
- Saturday Delivery

Drop Off /Delivery / Special Instructions

- Drop Off
- Delivery Confirmation
- Special Instructions
An alphanumeric field allowing you to enter additional instructions as needed.

Package Dimensions and Value

Enter as needed when Your Packaging is selected as a Package Type; dimensions are in inches

E-mail Notifications

select when an email notification is sent and to whom

- **Ship Notification**
Package has been shipped
- **Tendered Notification**
Package has been received at a FedEx location.
- **Delivery Notification**
Package has been delivered.
- **Exception Notification**
Package has had an issue in its shipment course.
- **Email**
This is defaulted from the contact selected if available. If there is no email address in that contact field, the email address from your SoftPro Select account is used

Labeling

An alphanumeric field to enter the **Ref #**.

Clicking the **Close** button returns you to the **Create Shipment** screen. From the **Create Shipment** screen, click the **Submit** button to submit the shipment to FedEx.

Create Shipment

Select a Contact: **Chris Cornell**

Account No.: test (XXXXX1073)

Person: Chris Cornell

Ship To: Chris Cornell

Company:

Address: Company Person Forwarding Address

Address1: 45 Hawthorne Ave

Address2:

City/State/Zip: Larkspur CA 94939

Phone: (415) 755-5226

Package Type: FedEx® Envelope 0.1 lb.

Service Type: FedEx Standard Overnight® [Compare Rates](#)

Commodity: FedEx One Rate® Return Label

Options: Residential Delivery [More Options](#)

Validate Address

FedEx service marks are owned by Federal Express Corporation and are used by permission. **Submit** Cancel

Shipment Details Screen

The **Shipment Details** screen allows you to review the shipment information (**Shipping From/ Shipping To**) and the:

- **Tracking Number**
- **Shipping Cost**
- **Estimated Delivery Date**

From this screen, you can:

- **View/Open Label**
Opens the label using the default PDF viewer installed on your machine
- **Publish**
Attach the shipping label to Smartview or the order attachments
- **Cancel**

Shipment Details

Shipping From: Matt Berg
SoftPro 360
12102 Burl Ave
Hawthorne, CA 90250
(415) 755-5226

Shipping To: James Earl Jones
Fidelity Escrow Long
111 Bond Street
Bend, OR 97701
(541) 666-1212

Tracking Number: 794988811900 [Track](#)

Shipping Cost: \$101.42

Estimated Delivery Date: 2/20/2026

Shipping Label:

SmartView Folder: [Title Documents](#)

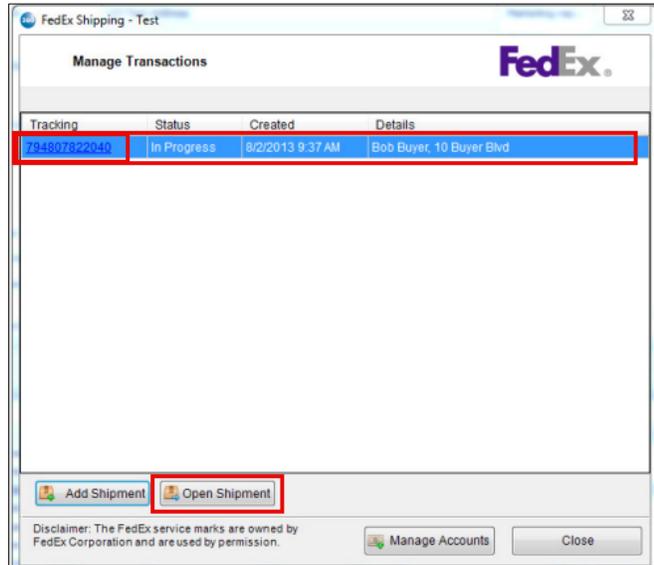
FedEx service marks are owned by Federal Express Corporation and are used by permission. Close

Clicking the **Close** button returns you to the **Manage Transactions** screen displaying the current and all shipments for this order.

From this screen, you can click the **Tracking** link to open/view the FedEx Tracking website.

The **Status** updates to **Completed** once the package has been delivered.

Clicking the **Open Shipment** button (enabled when the status of the transaction is **In Progress**) takes you back to the **Shipment Details** screen.



The transaction for this shipment will be displayed in the SoftPro 360 Queue with a link containing the FedEx tracking number. This link takes you to the FedEx tracking website.

Appendices

Appendix A: Shipping to International Addresses

The FedEx integration supports shipping to a limited number of international addresses, currently limited to the following US territories:

- **AS – American Soma**
- **FM – Federate States of Micronesia**
- **GU – Guam**
- **MH – Marshall Islands**
- **MP – Northern Marian Islands**
- **PW – Palau**
- **PR - Puerto Rico**
- **VI - Virgin Islands**

When the shipping address is a US territory or supported international address, the **Service Type** selections available are **FedEx International Priority** or **FedEx International Economy**.

When shipping to Puerto Rico, only **FedEx International Economy** is supported.

The **Commodity** link is enabled and is a required field when an international service type is selected.

In addition to the limited number of **Service Types**, other options are not available when shipping to an international address:

- FedEx One Rate
- Residential Delivery
- Return Label

From the **More Options** screen:

- Saturday Delivery
 - Saturday Pickup
 - Drop Off Method / Regular Pickup *
- * Valid when shipping to Puerto Rico

Appendix B: FedEx One Rate®

The FedEx integration supports One Rate (flat rate) shipping, which can be selected from the Create Shipment screen and offers simplicity and predictability. Anyone can use FedEx One Rate®. It lets you ship packages anywhere in the U.S. for a fixed, **FedEx 2Day®** flat rates price, meaning you can ship heavier items without paying more. It is required to use FedEx packaging, but there are a variety of boxes and envelopes.

Available Packages

- FedEx® Envelope
- FedEx® Pak
- FedEx® Tube
- FedEx® Small Box

The screenshot shows the 'Create Shipment' window in the FedEx Shipping software. The 'Service Type' dropdown is set to 'FedEx 2Day®'. The 'FedEx One Rate®' option is selected and highlighted with a red box. Other options include 'Residential Delivery' and 'Validate Address'. The 'Package Type' is 'FedEx® Envelope' with a weight of '0.1 lb.'. The 'Ship To' address is 'James Earl Jones, Fidelity Escrow Long, 111 Bond Street, Bend, OR 97701-1212'. The 'Account No.' is 'Berg (XXXXX1369)'. The 'Person' is 'James Earl Jones'. The 'Company' is 'Fidelity Escrow Long'. The 'Address' is 'Company'. The 'City/State/Zip' is 'Bend OR 97701-1212'. The 'Phone' is '(541) 666-1212'. The 'Package Type' is 'FedEx® Envelope' with a weight of '0.1 lb.'. The 'Service Type' is 'FedEx 2Day®'. The 'FedEx One Rate®' option is selected. The 'Options' section includes 'Residential Delivery' and 'Validate Address'. The 'Submit' and 'Cancel' buttons are at the bottom right.

Your Packaging

The One Rate option is not available if the selected package type is Your Packaging, it is still possible to get One Rate rates if you select valid package sizes. Selecting Your Packaging and entering the dimensions below will return the FedEx One Rate® for the specified size:

Package Sizing

- FedEx® Small Box
10-7/8" x 1-1/2" x 12-3/8"
8-3/4" x 2-5/8" x 11-1/4"
minimum weight = 1 pound
- FedEx® Medium Box
11-1/2" x 2-3/8" x 13-1/4"
8-3/4" x 4-3/8" x 11-1/4"
minimum weight = 1 pound
- FedEx® Large Box
12-3/8" x 3" x 17-1/2"
8-3/4" x 7-3/4" x 11-1/4"
minimum weight = 1 pound
- FedEx® Extra Large Box
11-7/8" x 10-3/4" x 11"
15-3/4" x 14-1/8" x 6"
minimum weight = 1 pound