



FedEx Ship Manager at fedex.ca™ Shipping Administration

Centralized control over decentralized shippers.

Shipping Administration is a feature on the Internet shipping solution FedEx Ship Manager at fedex.ca. It allows a single administrator or a group of users who have been given administrative privileges, to centrally manage and control shipments that are processed by multiple individuals from different locations within a company — all through the convenience of the Internet.

Shipping Administration was designed for organizations that:

- Have a large number of individual shippers in different locations with Internet access who each ship fewer than 25 packages a day.
- Need to centrally manage and control all shipments and related costs.
- Value the required reference field option, especially for billing shipping costs to internal departments or customers.

Shipping Administration Benefits

Shipping Administration helps companies gain better control over shipping processes and costs because it:

Provides an Administrator With User Controls

- The ability to set up reference field control(s) on up to four references for billing and charge-back purposes and to configure, mandate and validate the reference information entered into those fields.
- The ability to permit or restrict FedEx® services, options and customized shipping features to users at the department level, user level or both.
- The ability to set up a central address book with up to 15,000 recipients that can be shared companywide.
- The ability to create and save customized and detailed shipping reports.
- The ability to import users, departments, references and account information from your desktop.

Is Internet-Based

- Available 24 hours a day, 7 days a week, from any computer with an Internet connection, thereby reducing workload in centralized shipping areas.
- Requires no proprietary hardware or software.
- Offers all the timesaving features of shipping through FedEx Ship Manager at fedex.ca, plus automatic upgrades as new features are added.

Is Secure

All users must enter their user ID and password to log in to Shipping Administration, and account numbers are visible only to the administrator.

Shipping Administration Features

From the Shipping Administrator main menu, the administrator has access to the following screens:

- **Department Administration.** You can add new departments, view all departments, search for a specific department, and view and update an individual department. Departments can be set up as separate geographical locations or as functional groups within the organization that use different account numbers or cost centres. Part of adding a department includes:
 - **Department Profile.** Provides basic information that identifies the department.
 - **Department Privileges.** Gives department users access to certain rights and privileges, allowing department users access to all or some FedEx services — including return options — and specifying the default reference information that will be entered when a user ships a package. You can also require that certain reference information be mandatory — users will not be able to change it on the shipping screen or in the recipient profile of their address book.
 - **Department Defaults.** Sets default options that the user will see on the FedEx Ship Manager at fedex.ca screens.
 - **User Administration.** You can add new users (recommended maximum of 1,000); view a list of all users; search for a specific user; delete a user; and view and update the profile, privileges and defaults for a specific user.



- **Admin Reports.** You can create, add, edit and delete customized reports for any shipment processed using FedEx Ship Manager at fedex.ca™ in the past 45 days. Reports allow you to monitor and manage the shipping activity of all users throughout the company to better control costs and streamline accounting and chargeback functions. Once a report is generated, you can view and print it online or download it by saving it to your hard drive in comma-separated variable (CSV) format. You can track any shipment from within the report by clicking on the tracking number.

Getting Started

Once you've decided that Shipping Administration is the right tool for your company's needs, it's easy to get started:

- Select the 'Prepare Shipment Online' from the 'Ship' tab at **fedex.ca**.
- Click on 'Sign Up Now!' to register for a **fedex.ca** login and complete the online registration form.
 - NOTE: if you already have an ID/password for FedEx Ship Manager at fedex.ca, you must select a new ID/password to register for Shipping Administration.
- Ensure to enter account details as they appear on your invoice.
- On the confirmation screen select 'register' after: "Need to administer shippers in your company?" Complete the additional steps for validation and registration.
- A second confirmation page will appear, confirming that you've successfully registered as a shipping administrator.
- Select: 'Start' in the 'Managing shippers online' option.

Now you can begin adding departments and users.

Add Departments

From the Admin Home screen:

- Click on the 'Add department' button.
- Enter a department's information and either select a pre-existing account number or add a new one (must be an existing nine-digit account number). Ensure to enter account information as it appears on your invoice.
- When finished, click on the 'Next' button to go to the Privileges screen.

Privileges screen:

- Here you will configure department privileges by allowing or restricting user privileges, services allowed, reference options and special services. When finished, click on the 'Next' button to go to the References screen.

References screen:

- Here you will configure the department reference information that will appear on the corresponding reference fields on the FedEx Ship Manager at fedex.ca screens when Shipping Administration users log on. (References are optional. If you do not need to add references, select 'Next' to go directly to the Defaults screen.)

Reference options include:

- Setting up reference validation for the reference fields.
- Creating reference lists.
- Specifying or creating reference default information.
- Selecting that reference settings apply to return shipments. When finished, click on the 'Next' button to go to the Defaults screen.

Defaults screen:

- Here you will configure department default information by customizing options and selecting service settings (e.g., package type, billing information, pickup/drop-off). These preferences will become the default preferences for all users assigned to the department. When finished, click on the Save/Update button.

Please note: You can also use the Department tab to add or update departments.

Add Users to a Department

From the Admin Home screen:

- Click one of the following options:
 - 'Create User': allows Administrator to create and manage a User's login ID and password.
 - 'Invite user' allows users to create and maintain their own login/password
Reminder: if users already have an ID/password for FedEx Ship Manager at fedex.ca a new ID/password must be selected to register for Shipping Administration.
- From the drop-down menu, select the department to which you wish to assign the user. The department settings will then pre-populate in the user Profile, Privileges and Defaults screens.



- Enter the new user details.
- Assign the user to a department account by selecting an existing account number from the Accounts assigned drop-down menu.
- Assign the user to one of the following options:
 - Regular user (non-Admin): to allow a user to have access to FedEx Ship Manager functionalities and screens,
 - Department administrator: to give a user administrative privileges within an assigned Department only.
 - Company administrator: to give a user administrative privileges at company level.
- To determine the user settings:
 - If you want the new user to have the same settings as the department, which the user cannot customize, then click on the radio button next to 'Use department privileges, references and defaults,' then click on the Invite user button. The user may now begin shipping.
 - If you want the new user to have different settings than those set up for the department, click on the radio button next to 'Customize privileges, references and defaults.' The Profile screen will reappear. Click on the 'Next' button to advance to the Privileges screen. When finished here, click on the 'Next' button to go to the user References screen. Once you've finished customizing this screen, click on the 'Next' button to go to the Defaults screen.
 - Once you've finished customizing this screen, click on the 'Invite user' or 'Create user' button. The new user information has been saved and will be added to the User table. An invited user will receive an email advice to use the account for shipping.

Please note: A user given customized defaults will not be affected by updates you make to the department's defaults. If you want the updates to apply to the user, you will have to make them manually via the Users tab.

Change User Information

From the Admin Home screen:

- Enter the user ID in the Update user field and click on the 'Go' button.
- Enter changes and click on the 'Save/Update' button.

You can also update a user's information by selecting the user's department from the View by Department dropdown menu and clicking on the 'Go' button. When you've located and selected the user you're looking for, click on the 'Update' button.

Please note: You can also choose the Users tab to add or update users.

Change Department Information

From the Admin Home or Department screen:

- Select the department from the Update dept. drop-down menu and click on the 'Go' button.
- Enter changes. If you change any address information for the department and want to apply it to all users, check the box next to 'Update all user profiles in department for changes to department address.' Click on the 'Save/Update' button.

Delete a Department

Please note: All users in that department must be deleted or reassigned to other departments before you can delete the department.

From the Admin Home screen:

- Select the department from the Update dept. drop-down menu and click on the 'Go' button.
- Click on the 'Delete' button.
- Confirm the deletion.

Assign a New Account Number to a Department

From the Admin Home screen:

- Select the department from the Update dept. drop-down menu and click on the 'Go' button.
- Click on the 'Add new account' button.
- Complete the required information and click on the 'Save/Update' button. Ensure to enter account information as it appears on your invoice.



Set Up Central Address Book

From the Address Book main screen:

- Select 'Central Address Book' from the white navigation bar.
- Click on the 'Create new address' button.
- Enter all address information and all optional address information. Click on the 'Save/Update' button.

Create a Shipping Activity Report

From the Admin Home screen:

- Select Admin Reports from the white navigation bar.
- Click on the 'Add new report' button.
- Select the fields you want to include in the report.
- If you want to sort the report, use the drop-down menus to select the desired fields. If you do not want a sorted report, do not select any fields.
- Set the date range for the report.
- Click on the 'Create report' button. The report will display.
- While the report is displayed, you can view, print or download the entire report.
- To download the report in a comma-separated value (CSV) format, click on the 'Download' button. Downloaded reports are saved to a location of your choosing on your hard drive.

Please note: To run this report again from the Shipping Administration Report Manager, select the report from the 'Select Report' drop-down menu, select beginning and ending dates from the drop-down menus provided, and click on the 'Create report' button.

Get Additional Assistance

For more details on administrator functionality:

- Use the Quick Help tool located within Shipping Administration.
- Download the Shipping Administration Administrator's Guide (PDF) located in the FedEx Services and Tools section of **fedex.ca**, under Automated Shipping Tools.
- For technical assistance, call 1.877.339.2774.