

How to transfer your Recipient Address Book from FedEx Ship Software for Windows to FedEx Ship Manager Software for Windows

There are four phases to completing the transfer process.

- Phase I** Export and format your Recipient Address Book.
- Phase II** Format your Recipient Address Book spreadsheet.
- Phase III** Create an IMPORT template in FedEx Ship Manager Software.
- Phase IV** Import your Recipient Address Book using your new IMPORT template.

Phase I Export and Format Your Recipient Address Book

From FedEx Ship for Windows to FedEx Ship Manager Software for Windows

Please use a blank, formatted disk

- Step 1.** Launch FedEx Ship for Windows
- Step 2.** Click the **Address** icon.
- Step 3.** From the **File** menu, click **Export...**
- Step 4.** Insert a blank, formatted 3 _ inch floppy disk into the floppy disk drive.
- Step 5.** In the **Destination File** field enter a:\fswaddr.csv

Note: If your computer's 3 _ inch floppy [A] drive is any other letter other than [A], in the **File name:** field, enter **the letter** that identifies your 3 _ inch floppy disk drive followed by:\fswaddr.csv.

- Step 6.** From **Text Delimiter** drop-down, select the “ (double quote).
- Step 7.** From the **Field Separator** drop-down select the , (comma).
- Step 8.** Click the **ACT! 3.0 Export Map** button. All fields will be exported.
- Step 9.** Click the **Export** button.
- Step 10.** FedEx Ship automatically saves the file in .csv format.
- Step 11.** The **Address Book Export** box displays showing the number of records exported.
- Step 12.** Click **OK**.
- Step 13.** Proceed to **Phase II** to format your Recipient Address Book spreadsheet.

Phase II Format Your Recipient Address Book Spreadsheet

Step 1. Open Excel and then open the file “fswaddr.csv” from your 3 1/2 inch floppy [A] drive.

Step 2. Update your spreadsheet with the recipient address information in the following manner:

Delete the following columns:

Department
Residential

Create a Recipient Code Column and a Contact Name Column

FedEx Ship Manager Software uses only one field for both the First and Last name. In order to import the recipient name into a single field the First and Last name must be merged and displayed in a single column.

- 1) Insert 2 columns between the columns “Last Name” and “Company”.
- 2) Type in the heading “Contact Name” as a heading for the second new column (D1). A sample of how the spreadsheet should appear is provided below.

	D1	=	Contact Name		
	A	B	C	D	E
1	First Name	Last Name		Contact Name	Company Name
2	John	Smith			ABC Company

- 3) Next, we will populate the “Contact Name” field for each recipient by merging the First Name field and Last Name field for each recipient.
 - i) Click on cell (C2) and enter a space by pressing the space bar once. We will use this space to separate the First Name and Last Name by a single space.
 - ii) Click on the cell (D2), then type in the following command:
=CONCATENATE (A2,C2,B2)
 - iii) The spreadsheet should now look like this.

	D2	=	=CONCATENATE(A2,C2,B2)		
	A	B	C	D	E
1	First Name	Last Name		Contact Name	Company
2	John	Smith		John Smith	ABC Company

- iv) Copy the cell (D2) and then paste this formula for each cell under column (D) so that the full name of each recipient is displayed in the manner demonstrated above.
- v) The formula must now be removed from each cell and replaced with the actual “Contact Name” that is to be displayed for each cell in column (D).

Click on column (D) to **highlight the entire column**, then right-click and select “Copy” from the drop down list.

Without making any changes, right-click again but select “Paste Special” from the drop down list. Click on the option “Values”, then click “OK”. When you select a recipient Contact Name (i.e. cell D2), the full name should appear in the Formula Bar at the top of the spreadsheet, instead of the Excel formula you previously entered. Please see sample image below.

D2		=		John Smith	
	A	B	C	D	E
1	First Name	Last Name		Contact Name	Company
2	John	Smith		John Smith	ABC Company

- 4) A Recipient Code is required in FedEx Ship Manager Software to identify each unique recipient. Since FedEx Ship Software does not use this field, a unique Recipient Code must be created for each recipient. For purposes of this process, the Contact Name will be used to identify a unique recipient. From the Ship page, the Recipient Code will be later displayed in alphabetical order and the Company name on the same list immediately next to the Recipient Code.

To Create a Recipient Code for each recipient:

Click on column (D) to highlight the entire column, then right-click and select “Copy” from the drop down list. Click on columns (C) to highlight the entire column and right-click again but select “Paste” from the drop down list. Columns (C) and (D) should now be identical. Finally go to cell (C1) and change the header from “Contact Name” to “Recipient Code”. Please see sample image below.

C1		=		Recipient Code	
	A	B	C	D	E
1	First Name	Last Name	Recipient Code	Contact Name	Company Name
2	John	Smith	John Smith	John Smith	ABC Company

- 5) Finally, highlight the entire column of both “First Name” and “Last Name” and delete these columns.

C6		=		
	A	B	C	
1	Recipient Code	Contact Name	Company	
2	John Smith	John Smith	ABC Company	

- 6) To save your changes:

Click “File” and “Save” as the same file name.
 Click “Yes” to replace the existing file.
 Click “Yes” again, to keep the workbook in this format.

Format the Recipient Phone Number field

- 1) The recipient phone number column must be re-formatted in order to import to FedEx Ship Manager Software. A separate column is required for the phone number and the extension number.
 - i) To ensure the numbers are displayed correctly, select to highlight the "Phone" number column. Click "Format" then select "Cells" from the main menu. From the "Format Cells" pop-up page, select "Number" in the "Category:" list. Select "0" in the "Decimal places:" drop down list, click OK. When you click on a phone number the complete phone number should now be displayed without any decimal places.
 - ii) To separate the phone numbers from the extension numbers, follow the steps below. If you do not have extension numbers in your phone number list then you can skip this step. Each phone number must be 10 digits in length.
 - Insert a column to the right of the "Phone" column. Type "Phone Extension" for the heading.
 - In the first cell in the "Extension Number" field type in the following formula, **=RIGHT(I2,(LEN(I2)-10))** . This will display only the numbers to the right of the first 10 digits that represent the recipient phone number.

Example: Phone Number (416) 555-1234 Extension Number: 123

J2		=		=RIGHT(I2,(LEN(I2)-10))							
	A	B	C	D	E	F	G	H	I	J	K
1	R	C	C	A	S	C	P	P	Phone	Phone Extension	Country
2	J	J	A	5	F	M	O	L	4165551234123	123	CA

- iii) Copy the cell (J2) and then paste this formula for each cell under column (J) so that the Phone Extension number for each Phone number is displayed in the manner demonstrated above.
- iv) The formula must now be removed from each field and replaced with the "Phone Extension" value that is displayed for each cell. Click on column (J) to highlight the entire column, then right-click and select "Copy" from the drop down list. Without making any changes, right-click again but select "Paste Special" from the drop down list. Click on the option "Values", then click "OK". When you select a Phone Extension number (i.e. cell J2), the Extension number should appear in the Formula Bar at the top of the spreadsheet, instead of the Excel formula you previously entered.

J2		=		123							
	A	B	C	D	E	F	G	H	I	J	K
1	R	C	C	A	S	C	P	P	Phone	Phone Extension	Country
2	J	J	A	5	F	M	O	L	4165551234123	123	CA

- v) Next, we must remove the extension number from the “Phone” column so that only the first 10 digits of the phone number are displayed. Insert a column to the right of the “Phone” column. Click on the cell in the new column next to the phone number at the top of the list (J2) and then type in the following formula, **=LEFT(I2,10)** . Only the first ten digits of the phone number will be displayed.

J2		=		=LEFT(I2,10)								
	A	B	C	D	E	F	G	H	I	J	K	L
1	R	C	C	A	S	C	P	P	Phone		Phone Extension	Country
2	J	J	A	5	F	M	O	L	4165551234123	4165551234	123	CA

- vi) To extend this format to each recipient phone number, Click on the cell (J2) and then right-click to select Copy, then drag down to highlight all of the cells in column “J” that are next to a recipient phone number in column “I”.
- vii) The formatted phone number must now be removed from each field and replaced with the “Phone” value that is displayed for each cell. Click on column (J) to highlight the entire column, then right-click and select “Copy” from the drop down list. Without making any changes, right-click again but select “Paste Special” from the drop down list. Click on the option “Values”, then click “OK”. When you select a Phone Extension number (i.e. cell J2), the Extension number should appear in the Formula Bar at the top of the spreadsheet, instead of the Excel formula you previously entered.

Enter the Heading “Phone” at the top of the new column (J).

J2		=		4165551234								
	A	B	C	D	E	F	G	H	I	J	K	L
1	R	C	C	A	S	C	P	P	Phone	Phone	Phone Extension	Country
2	J	J	A	5	F	M	O	L	4165551234123	4165551234	123	CA

- viii) Delete the old “Phone” column (I) so that only the new formatted “Phone” column remains and is now displayed in the column (I).

M6		=									
	A	B	C	D	E	F	G	H	I	J	K
1	R	C	C	A	S	C	P	P	Phone	Phone Extension	Country
2	J	J	A	5	F	M	O	L	4165551234	123	CA

- 2) To save your changes:

Click “File” and “Save” as the same file name.
 Click “Yes” to replace the existing file.
 Click “Yes” again, to keep the workbook in this format.

Step 3.

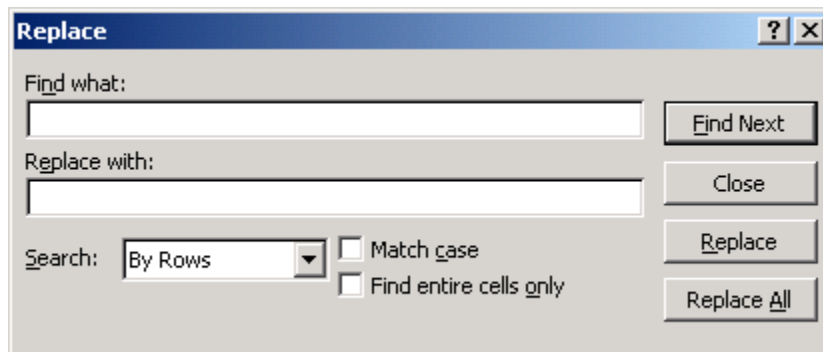
In order to avoid errors at time of import some important changes will first need to be made to the format in which the address book information is displayed in your spreadsheet.

- 1) The following symbols must be removed from your address book. These symbols will create errors when importing your file in (.csv) format:

- | | | |
|--------------------|---|--|
| 1 - The Comma | , | (Remove from the entire spreadsheet) |
| 2 - The Semi-colon | ; | (Remove from the entire spreadsheet) |
| 3 - The Colon | : | (Remove from the entire spreadsheet) |
| 4 - The Apostrophe | ' | (Remove from the entire spreadsheet) |
| 5 - The Hyphen | - | (Remove from the entire spreadsheet) |
| 6 - The Period | . | (Remove from all columns, except the e-mail field columns) |

You must remove each symbol listed from your database one at a time in the following manner:

- i) Click to select the entire spreadsheet or the columns of the spreadsheet you wish to edit. You may click on the cell in the top left corner to highlight if you wish to edit the entire spreadsheet.
- ii) Click "Edit" and select "Replace..." from the drop down menu. The "Replace" pop-up window will appear (see below).



- iii) In the "Find what" field, enter one of the listed symbols to be removed. In the "Replace with" field, enter a blank space by pressing the space bar if you wish to replace the symbol with a blank.
- iv) Click on the "Replace All" button. Follow the above steps to remove the listed symbols from the spreadsheet or appropriate columns.

Note: Be careful not to remove the period symbol "." from the columns listing your e-mail addresses. If you do, you may replace the period symbols by reversing the process explained above and replace a space with a period for the e-mail field columns you select.

- 2) When U.S. Zip Codes are exported from FedEx Ship Manager at fedex.ca™, the first digit may be removed, if it is a zero "0". The "0" must be restored to the Zip Code(s) or an error will occur when you attempt to import your Recipient Address Book:

To restore the ZIP code to its original format follow the steps below:

- i) Click on ZIP/Postal Code column to highlight this column.

- ii) Click on Format from the main menu bar, then select “Cells” from the drop down menu.
- iii) Select “Special” from the Category list
- iv) Select “Zip Code” from the type list
- v) Click OK.

Note: This task will need to be repeated if you retrieve the address book file and wish to save the Zip Code information again in its corrected format.

3) Account Number Information:

Review the list “Bill Account Number” on your spreadsheet and confirm your sender account is listed in the column, where a recipient or 3rd party account is not already provided. Confirm that the accounts are valid. Remove or correct any incomplete account numbers. A blank “Bill Account Number” field will result in an error.

4) Confirm that you have the column and headings displayed in the correct order.

- Column 1- Recipient Code
- Column 2- Contact Name
- Column 3- Company
- Column 4- Address
- Column 5- Suite
- Column 6- City
- Column 7- Prov/State
- Column 8- Postal Code/ZIP
- Column 9- Phone Number
- Column 10- Phone Extension
- Column 11- Country Code
- Column 12- FedEx Acct#
- Column 13- E-mail
- Column 14- Customs ID/EIN

5) Save your changes:

Click “File” and “Save” as the same file name.
 Click “Yes” to replace the existing file.
 Click “Yes” again, to keep the workbook in this format.

Phase III Create an IMPORT Template in FedEx Ship Manager Software.

You are now ready to create the IMPORT template in FedEx Ship Manager Software

The first step in importing or exporting data is creating or selecting a template. The recipient data fields in your import template must be displayed in the same order as the columns in your spreadsheet.

- Step 1** Launch FedEx Ship Manager Software
- Step 2** From the “Databases” from drop down menu, select “Templates”
- Step 3** The “View Templates” pop up page is displayed.

Step 4

From the “View Templates” Pop-up page, click the “Add” button

The screenshot shows the 'View Templates' dialog box with the following sections:

- Template list:** A table with columns 'Template Code', 'Description', and 'Type'. The first row is 'COMMODITY EXP' with description 'Default Commodity export' and type 'Export'.
- Template details:** Fields for Description, Type, Database, and File name.
- Format:** Radio buttons for 'Delimited' and 'Fixed', and dropdowns for Delimiter, Field separator, Date format, Date delimiter, and Default country code.
- Template fields:** A table with columns 'Field', 'Start', and 'End'. It lists fields like 'Commodit...', 'Unit Quan...', 'Unit of Me...', 'Unit Value', 'Export Lic...', 'Expiration...', and 'Harmoniz...'.
- Export at close:** Checkboxes for 'Export at Express close', 'Export at Ground close', 'Export Express data', 'Export Ground data', 'Exclude deletes', and 'Export by close date'.
- Buttons:** 'OK', 'Add' (circled in red), 'Add by duplication', 'View/Edit', 'Delete', and 'Print'.

Step 5

In the Add Template Pop-up page complete the available fields in the following manner:

- i) For the Template ID, enter a template name (i.e. “FSHIP IMP”).
- ii) For the Description, enter a description (i.e. “FEDEX SHIP RECIPIENT IMPORT”).
- iii) For Type, select “**Import**”.
- iv) For Database, select “**Recipient**”.
- v) For Format, select “**Delimited**”.
- vi) In the Delimiter field select “**None**”.
- vii) In the Field Separator field select the comma “**,**”.
- viii) Select the Default country code as “**CA-Canada**”
- ix) Check the box to indicate “**Column headers on 1st line**”.

Step 6

You must now select the required fields for the Import template. Click on each “Description” name from the Database fields list below (i.e. Recipient Code) then click “**Add**” in order to add it to the “Template fields” list.

Note: The fields listed below must be added in the same order described below. Listing the fields in any other order will result in errors when attempting to import your address book.

Follow these steps to create your first field “Recipient Code” in your import template.

- i) Scroll down the “Description” names until you see the name “Recipient Code”. The list is displayed in alphabetical order.
- ii) Click on “**Recipient Code**” so that it is highlighted.
- iii) The “Add>>” button is now activated. Click the “**Add>>**” button.
- iv) The “Recipient Code” field should now appear as the first item in the “Template fields” list, just to the right of the “Database fields” list.

Continue to add each of the required fields in the order provided below.

- 1- Recipient Code – Process to add this description is provided above
- 2- Contact
- 3- Company
- 4- Address 1
- 5- Address 2
- 6- City
- 7- State/Province
- 8- ZIP/Postal Code
- 9- Phone Number
- 10- Phone Extension
- 11- Country Code
- 12- FedEx Acct#
- 13- Shipment Notify E-mail ID-1
- 14- Customs ID/EIN

Step 7 Carefully review the “Template fields” list on the screen with the list above and verify that the list is identical.

The “Add Template” screen should now look like this:

The screenshot shows the "Add Template" dialog box with the following details:

- Enter template information:**
 - Template ID: FSHIP IMP
 - Description: FEDEX SHIP IMPORT
 - Type: Import
 - Database: Recipient
 - File name: (empty)
- Format:**
 - Delimited (selected), Fixed (unselected)
 - Delimiter: None
 - Field separator: .
 - Date format: MMDDYYYY
 - Date delimiter: /
 - Default country code: CA - CANADA
 - Column headers on 1st line: checked
- Fields:**
 - Database fields:**

Description	Start
Address 1	35
Address 2	35
City	35
Company	35
Contact	35
Country Code	2
Customs ID/EIN	18
FedEx Acct #	9
FedEx Bill D/T/F 3rd Party Ac...	9
 - Template fields:**

Description	Length	Spec.Fmt	Deflt.Val
Recipient ...	15		
Contact	35		
Company	35		
Address 1	35		
Address 2	35		
City	35		
State/Pro...	2		
Zip/Postal...	10		
- Export at close:**
 - Export at Express close: unchecked
 - Export at Ground close: unchecked
 - Export Express data: unchecked
 - Export Ground data: unchecked
 - Exclude deletes: unchecked
 - Export by close date: unchecked

Note: If you need to make a correction, you can “Add” a database field by clicking on the database field you wish to add. Next, click on the template field immediately above the space you wish to add the database field, then click “Add”. If you wish to remove a “Template field”, simply click on the Template field and click “Remove”. If you have no further changes, continue to the next step.

Step 8 To save your template and close the “Add Templates” Pop-up page, click OK.
Step 9 To close the “View Templates” Pop-up page, click OK.

Phase IV Import Your Recipient Address Book Using Your New IMPORT Template

You are now ready to Import your Recipient Address Book

- Step 1** Save and Close your Excel file Spreadsheet. If the file is open, the file cannot be accessed during the import process.
- Step 2** From the FedEx Ship Manager Software “Databases” drop down menu, select “File Maintenance” and then “Import”.
- Step 3** The “File Maintenance – Import” pop-up page appears (see below).

The screenshot shows a dialog box titled "File Maintenance - Import". It has a standard Windows-style title bar with a question mark icon and a close button. The main content area is divided into several sections:

- Enter file import information:** This section contains a "Template name:" label followed by a dropdown menu. Below it is an "Input filename:" label followed by a text input field and a "Browse" button.
- Import behavior:** This section contains two radio buttons: "Append to current data" (which is selected) and "Replace current data".
- Record count:** This section contains two text input fields labeled "Processed:" and "Errors:".
- Auto-assign IDs:** This section contains a checkbox labeled "Auto-assign IDs". Below the checkbox are three text input fields labeled "ID prefix:", "Length of numeric suffix:", and "Starting suffix number:".

At the bottom of the dialog, there are two buttons: "OK" on the left and "Cancel" on the right.

- Step 4** Select the Template name “FSHIP IMP” from the drop down menu.
- Step 5** For the Input Filename, enter a:\ followed by the default import file name, or click the Browse button and click “Open” to select the import file (i.e. fswaddr.csv).
- Step 6** Select to “Append to current data”.
Note: If you wish to replace your address book with the database you are importing, then select “Replace to current data”.
- Step 7** Click “OK”. The system notifies you when the import is complete.
- Step 8** Select the database from the Database menu and view the data.

That’s it !!

Troubleshooting

If a specific file does not import correctly or produces an error then it will not appear in your FedEx Ship Manager recipient database.

Select the option to list the error(s) and copy and paste this to a word document for reference so that you can identify these recipients on the import database (spreadsheet). You may then review each line to find any problems or issues with a particular recipient address line. A long list of similar errors may be attributed to an error in your template or spreadsheet. Review the instructions above to verify that all of the columns and fields required are listed in the order described. Also review the lines on your spreadsheet that demonstrate errors and confirm that no special characters have been inserted into the recipient information that may interfere with the import process. In some cases, special characters or symbols in certain columns may result in an error.

Note: Due to the column headings on your spreadsheet, a reference to line 2 represents the 2nd recipient address but the 3rd row of information on your spreadsheet.

Make any needed changes to the excel spreadsheet, save the changes and re-attempt to import the same file. This process can be repeated until all files are successfully imported.

Note: When you attempt to re-import the same recipient information, you must select the “**Replace**” option on the “File Maintenance – Import” screen to accept the changes. This feature will replace all of the recipient information including information changed for a given Recipient Code. If you only have a few errors and are unable to identify the source, you may choose to manually re-enter these addresses directly into your recipient address book.

Contact Us

If you have any questions, please call 1.877.853.4485 option 2 and select the option for Technical Support for FedEx Ship Manager Software.