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Introduction to Shipping Administration

The Shipping Administration feature of FedEx Ship Manager® at fedex.com allows a single administrator or any user assigned administrative privileges to centrally manage and control shipments that are processed by multiple individuals shipping from their desktops. Users can be in the same location or dispersed geographically across multiple locations within a company. With Shipping Administration, an administrator can configure shipping options or restrict services, customize reference information and run reports on the shipping activity of users across the company. The main features of Shipping Administration allow multiple users to have access privileges to FedEx Ship Manager and prevent unauthorized users from accessing your on fedex.com. Through the convenience of the Internet, the Shipping Administrator can

- Maintain Department (or group) profiles including FedEx account numbers, service options, and restrictions for a specific department.
- Configure a robust set of privileges and defaults that could be assigned to departments and customized at the user level.
- Assign and set up an unlimited number of Shipping Administration domestic and international users within the departments.
- Allow an administrator to add multiple FedEx account numbers to Shipping Administration and assign individual users to these accounts.
- Ability to require up to 4 references and set default values for these references at the department and user level. For added control, administrators can configure reference values that cannot be changed by their users.
- Create customized reports to display the shipping activity of users company-wide. Administrative reports can be viewed online, printed, and downloaded.
- Set up a Central Address Book that can be accessed by Shipping Administration users across the entire company. In addition, users can set up a Personal Address Book and it with other Shipping Administration users in the company.

Potential benefits of using FedEx Ship Manager at fedex.com and the Shipping Administration functions are:

- Enhanced ability to track and control costs through customization, reporting, and visibility.
- Improved efficiency in the shipping process throughout the company.
- Reduced workload in a centralized mail room through controlled distribution of shipping tasks.
- More efficient administration and reporting.
- All the timesaving features of shipping through FedEx Ship Manager at fedex.com.
- Secure information - password protected and account numbers are invisible to users.
- Access 24-hours-a-day; 7-days a week.
Getting Started with Shipping Administration

Overview

Before you begin the setup process, first determine how you would like to organize and control users who will be using Shipping Administration. All users must be assigned to one department in Shipping Administration.

Departments can be set up as separate geographical locations or functional groups within your organization that use different FedEx account numbers or cost centers. When users are assigned to a department, they can be assigned to ship from one of the available accounts for that department. In addition, as a member of a department, users by default will inherit the same physical address, privileges, and default settings for that department. These can be customized at the user level for greater flexibility and control. See the Departments and Users sections for more information and detailed instructions.

When you log into FedEx Ship Manager® at fedex.com as an administrator, the Welcome to Shipping Administration screen displays. Follow these steps to start using Shipping Administration:

- Add one or more departments and set service and reference options for each department.
- Update your Company Profile for additional configuration options.
- Add users to departments and assign users to FedEx account numbers.
Shipping Administration Login

(1) Go to fedex.com and click on the Ship tab. The FedEx Ship Manager at fedex.com login screen displays.

(2) Enter both the User ID and Password in the blank fields and click Login. The FedEx Ship Manager Ship screen displays for most users. However, if a user has been assigned administrative privileges, the Shipping Administrator screens automatically display.

Important! All login information, including the user ID and password, is case-sensitive.

Change Password

If a Shipping Administration user forgets his or her password, they can get assistance via email by clicking on the Forgot your password? link on the login page and following the instructions.

Remember my user ID on this computer

When you select this option, your user ID and password are saved, so that you do not have to reenter this information when you return to the FedEx Ship Manager at fedex.com login screen.
Welcome to Shipping Administration Screen

Overview

When you log into FedEx Ship Manager at fedex.com as an administrator, the Welcome to Shipping Administration screen displays and serves as the central point for all Shipping Administration administrative tasks. You can always return to the Welcome to Shipping Administration screen by clicking Admin Home on the secondary navigation bar.
As an administrator, you can exit the administrative functions and access the shipping functionality of FedEx Ship Manager at fedex.com. When you access FedEx Ship Manager at fedex.com, you can only manage your own personal shipments and view your own shipping history. To return to your administrative tasks, click on the Admin tab.

The key administrative tasks can be accessed using the secondary navigation options under the Admin tab:

- Department Administration (Departments)
- User Administration (Users)
- Reference Administration (References)
- Administrative Reporting (Admin Reports)
- Account Administration (Accounts)
- Company Profile (Company Info)

Please refer to the help outlined on these screens for more details.

From the Welcome to Shipping Administration screen, you can access the following screens:

- Users—Invite or create new user, Update user, and View by department
- Departments—Add department and Update department
- Reports—Select a type of report and a date range, then create the report.
- Shipping Administration bulletin board—Describes general information (e.g., features, important notes) for Shipping Administrators

Welcome to Shipping Administration Navigation

By clicking on the Help icon in the top right corner, you can access the appropriate section in the Shipping Administrator FAQs. Help is available on all of the Shipping Administration screens in each section. To access Online Help for your current screen, select Help with This Page on the help drop-down menu. For step-by-step instructions that include screenshots, select Interactive Help Guide.

Admin Tab on Primary Navigation Bar

When you click on the Admin tab on the primary navigation bar, the Welcome to Shipping Administration screen displays with the following secondary navigation bar:

- Admin Home—Clicking this link brings you to the Welcome to Shipping Administration screen, where you can administrate departments and users, run reports, etc.
- Departments—View a list of existing departments, add departments, update departments, import departments, and export departments.
- Users—View a list of all Shipping Administration users, add new users, update users, import users, and export users.
- References—View a list of existing references, add references, update references, import references, and export references.
- Admin Reports—Create administrative reports to monitor shipping activity by department.
• **Accounts**—View, search, sort, edit, delete and add accounts.

• **Company Info**—Clicking this link displays the Company profile screen, where you can manage basic company information.

• **Log out**—Clicking this link logs you out of Shipping Administration and returns you to the FedEx Ship Manager at fedex.com login screen.

**Other Tabs on Primary Navigation Bar**

In addition to being able to perform all administrative functions within Shipping Administration through the Admin tab, you also have access to all of the standard functionality of FedEx Ship Manager at fedex.com through the other primary tabs at the top of the screen:

• **Ship**

• **Track/History**

• **Manage**

• **Business Solutions**

While the Admin tab only displays for administrators, the other tabs are available for FedEx Ship Manager at fedex.com users, Shipping Administration users, and Shipping Administrators.

To select a screen or function within FedEx Ship Manager at fedex.com, choose the appropriate option from the tabs across the top of the screen (e.g., Ship, Track/History, Address Book, Fast Ship, Reports).

As you navigate throughout the Shipping Administration administrative screens, shipping options are available at the top of each screen.

**Users**

There are two options for adding users. Select **Create user** to add a user to designate their login ID and Password along with all shipping privileges. Select **Invite user** to add a new user to designate all shipping privileges but allow the user to create a login ID and password.

To update a user directly, enter the user ID of the user you would like to view or update and click **Go**.

To update a user by selecting from a list of users in the department they belong to, go to the View by dept section and select the department from the drop-down list. A list of users in that department displays. From here you can select the user ID from the list to update.

**Departments**

Select **Add department** to add a new department to Shipping Administration.

To update an existing department, go to the Update dept section and select the department ID from the drop-down list. The department profile displays, where it can be viewed or updated.
Company Info

Overview

You can update all of the company information, except the company ID. The company ID cannot be edited once registration is complete. To update or cancel your changes, click Save/Update or Cancel at the bottom of the screen.

The Company profile screen contains all of the basic customer company information, which includes the company name, contact name, telephone number, and email ID of the company administrator. By default, the first user created during the Shipping Administration setup process will be the contact name designated in the company profile. The Select contact drop-down menu also contains the names of all of the company administrators. These users are assigned full administrative privileges and can be designated as company contact.

Company information

- **Company name** — The company name provided during the Shipping Administration setup auto-populates the Company name field.
• **Contact name** — The Contact name is the person that is assigned administrative privileges and will be responsible for managing the administrative functions for a group of users within a particular department or company. There can be multiple users assigned administrative privileges for Shipping Administration, but the contact name entered in the Company profile screen is the administrator chosen during the initial Shipping Administration setup.

• **Email** — The Email ID is the administrator email that was created during the initial Shipping Administration setup. The administrator email address in the Company profile screen is the email ID that users are directed to if they click **Contact your administrator** on designated FedEx Ship Manager at fedex.com screens. This can be updated at any time by selecting another administrator from the Select contact drop-down list. When you select another contact, the contact name, telephone number, and email automatically change.

• **Prevent users from changing User IDs and Passwords** — Selecting this checkbox will prevent Users from being able to change their user IDs and Passwords via the My Profile section located within FedEx Ship Manager at fedex.com.

• **Enable for FedEx SmartPost** — Only select this checkbox if the account you are entering below has been contractually-signed for FedEx SmartPost services. Once enabled, the FedEx SmartPost services will be available within FedEx Ship Manager at fedex.com and Shipping Administration. If this account has not been contractually-signed, you must contact your FedEx Account Representative in order to use this service offering.

To save this company information, click **Save/Update**. To cancel your changes, click **Cancel**.

### Add or Update Company Information

To add or update basic contact information about your company, complete the following these steps:

1. Select a contact name from the Select contact drop-down menu. The Contact name, Telephone, and Email fields display information from the contact's user profile. The Contact name is the administrator who is the main company contact. The Email ID is used as the administrator contact when users select **Contact your administrator** on designated FedEx Ship Manager at fedex.com screens.
2. In the Company name field, enter the name of the company to which this contact is assigned.
3. If the administrator's access is being denied (e.g., user is being removed from Shipping Administration, administrator privileges are being revoked) and his email address is associated with the company profile, you must change the contact name in the company profile before performing this step. The affected administrator receives a message regarding this change.
4. To cancel your changes, click **Cancel**.
5. To save this company information, click **Save/Update**.

### Create New Company Profile

To create a new company profile, follow these steps:

1. On the FedEx Ship Manager at fedex.com login screen, click **Sign Up Now**. The Contact info screen displays.
2. Enter your information into the appropriate sections. (Required fields are in bold.) To create a new company profile, enter a new company name in the Company field in the Your Contact Information section.
3. Click **I Accept**. The Account info screen displays.
4. Enter the appropriate account number in the Enter a nine-digit FedEx account number field. If you enter a FedEx account number that is already registered with Shipping Administration, you cannot register that account number. Contact your Shipping Administrator for an invitation to use that account number.
5. Enter the appropriate account nickname in the Nickname this account (optional) field.
Click Continue. The Confirmation screen displays. In the Need to administer shippers in your Company area, click register. The Account info screen displays.

**Note:** Do not click Start Using FedEx Ship Manager. This displays the Ship screen within FedEx Ship Manager at fedex.com and will not allow you to register as a Shipping Administrator.

Confirm that the new company name displays in the Enter Company Name field and the account nickname displays in the Nickname this account field.

Click Continue. The Confirmation screen displays.

Click Set up New user group. The Welcome to Shipping Administration screen displays.
Departments

Overview

Department is a profile for a group of users that are either grouped by function, geographical area, or some other means that fits the needs of the company. Members of each department share certain default settings and service restrictions. All users in the company must be assigned to a department. Departments allow the administrator to centrally manage and control shipments for multiple individuals by assigning default options and service restrictions at the department level, and by running reports on the shipping activity of users by department.

By creating departments, you can save time when adding new Shipping Administration users. By simply assigning users to a department, the user screens automatically take on the shipping, location, accounts, privileges, and defaults of the department to which they are assigned. Address information, reference information, accounts, and service options are all applicable at the department level. This information can be modified in the user screens, except for accounts. Users can only be assigned to an account that has been made available to that department.

The Department feature contains the following screens and functionality. You can move between the Department Profile, Privileges, References, and Defaults screens by clicking Previous or Next. You can edit privileges at the user level after adding them to a department.
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- **Departments**—Displays key information about departments, such as the department name and department ID. The administrator can add, update, delete, import, and export departments.

- **Profile**—Displays information in the Department details and Accounts sections. See Profile Screen for more information.

- **Privileges**—Displays selected rights and privileges for the department in the Address book, General, Additional preferences, and FedEx services sections. See Privileges Screen for more information.

- **References**—Displays reference information in the Reference name, Validation, List display, Reference default, and Apply to return shipments sections. See References Screen for more information.

- **Defaults**—Displays information in the Default shipping information, Pickup/Drop-off, and Customize options sections. See Defaults Screen for more information.

When you click on the **Departments** tab, the Departments screen displays. As an administrator, you can perform the following department functions from this screen:

**Search**

**View Users in a Selected Department**

**Add New Department**

**View Department**

**Update Department**

**Delete Department**

**Import Department or Account**

**Export Department**

**Search**

Search by keyword

To search for a department, enter key information in the text field. (This field is case-sensitive.) Select Department ID or Department name from the drop-down menu. Click Search. The Departments screen displays information based on your text entry.

**Sort by**

You can sort either of the columns by selecting Department ID or Department name from the drop-down menu. Click Sort. The Departments screen sorts the selected column. You can also sort either of the columns by selecting the column heading.

**View Users in a Selected Department**

You can view users in a department from the Departments screen by selecting the department. Click View users. A list of users assigned to that department displays.

**Add New Department**

To add a new department, follow these steps:
(1) Click Add department within the Departments section of the Welcome to Shipping Administration screen or click Add on the Departments screen. The Add department screen displays and defaults to the Profile screen.

(2) Complete the Department details section that identifies the department. (Required fields are in bold). See Profile Screen for more information.

(3) Complete the Accounts section. You can add an account to the department by selecting an existing FedEx account from the Available accounts list or by adding a new FedEx account number. To add additional accounts to a department, update the department profile.

Note: To add an account, the address information must match the shipping account address information that was provided to FedEx. It can be different than the address entered in the department profile.

(4) Click Next. The Privileges screen displays and includes the Address Book, General, Additional preferences, and FedEx services sections. See Privileges Screen for more information.

(5) After completing the Privileges screen, click Next. The References screen displays and includes the Reference name, Validation, List display, Reference default, and Apply to return shipments sections. See References Screen for more information.

(6) After completing the References screen, click Next. The Defaults screen displays and includes the Default shipping information, Pickup/Drop-off, and Customize options sections. See Defaults Screen for more information.

(7) Click Save/Update. The department information is saved. You will return to the Departments screen.
Profile Screen

Department details

**Company name**—Enter the name of the company in which this department appears.

**Department name**—Enter the name of this department.

**Department ID**—The Department ID is the unique ID that is assigned to the department when it is initially created. Departments are identified by Department IDs when searching for or viewing a department profile or when the administrator is running a report. The Department ID is a maximum of 20 characters and is alphanumeric. Department IDs cannot be modified once they are created. Enter a Department ID.

**Accounts**

To add an account to a Department, select one or more existing accounts from the **Available Accounts** list and click **Add**. The accounts then appear in the **Assigned Accounts** list.
Privileges Screen
The Privileges screen allows the administrator to give users in the department certain rights and privileges by checking the appropriate boxes. If a box is unchecked, the user does not have that privilege.

Address book

**Personal address book**—Provides access to the Personal Address Book, where Shipping Administration users can create and manage up to 2,000 recipients from the Address book screen and select from these addresses on the Ship screen.

**Shared address book**—Provides access to the Shared Address Book screen where Shipping Administration users can access the shared address books of other Shipping Administration users in the company for one time use. Shipping Administration users cannot add, edit or delete recipients in a shared address book unless they are the owner of the address book.

**Central address book**—Provides access to recipients in the Central Address Book screen and via the drop-down menu on the Ship screen. Users without Administrative privileges cannot add, edit or delete entries in the Central address book.

**Sender profile/Add new senders**—Allows users to create up to 20 Sender profiles which can be managed from the Sender information screen in the address book. Additional senders can also be selected from the Ship screen when **Change sender address** is selected.

General

**Process return shipments** — Select this option to allow the ability to process return shipments. A popup then appears asking for Return Contact Information. Enter the return contact telephone number and an optional e-mail message, and then click Continue. When you select this option, the Create Return Shipment option under the Prepare Shipment tab and the Process a return shipment option in the Special Services section become available to the User.

**Require RMA no.** — Select this option to require a Return Material Authorization (RMA) number for return shipments. The RMA no. field will then show up in the Billing Details section in FedEx Ship Manager.

**Allow user to schedule pickup** — Select this option to allow the User to schedule pickups for shipments. The Pickup/Drop-off section would then show up in FedEx Ship Manager.

**Enable Electronic Trade Documents (ETD)** — Select this option to allow the User to electronically attach customs documents to the shipments. The customs documents will then show up in the FedEx Ship Manager under My Shipment Profiles and in the Product/Commodity Information under Customs Documentation.

**Create pending shipments** — Select this option to allow a User to save a shipment that can be processed later today or on a future date.

**Can only create pending shipments** — Select this option to only allow a User to save a shipment in pending status and not allow the processing and printing of a shipping label.

**Process other users pending shipments** — Select this option to allow a User to finalize other Users’ (who are tied to the same account number) pending shipments and print the shipping label. This option is not available to Users who have been assigned the option to “Can only create pending shipments”.

Rates and Transit Times

**Display this section** — This option will allow the user to see the rates and transit time module when preparing a shipment. The sub-options determine which features the user can access.

**Do not display rates (display transit times only)** – Hides account specific rates from the user allows him/her to see transit times.

**Always display all services** — Shows all services that the user can access.
Always show this section expanded – Shows the Rates and Transit Time section expanded each time the user creates a shipment

Do not display this section – Hides the section. Users will have no access to rates or transit times.

Additional preferences (Users can change these settings)

Set up thermal printer—Allows users to access additional printer options by displaying this section under the Customize features section of their Preferences screen. From here users can configure a thermal printer for printing shipping labels to a local thermal printer. If this privilege is not selected, users will only be able to print to a laser or inkjet printer (default).

Set up additional handling charges—Allows users access to these options under the Customize features section of their Preferences screen. From here users can set up additional handling charges (fixed or variable) for both FedEx Express and FedEx Ground shipments. These additional charges will display when the user requests a courtesy rate quote and accesses the shipping details for a particular shipment. This capability allows users to charge back additional costs of the shipment to customers.

View/Update default shipping information—Allows users to access and configure Default shipping information (e.g., default service, package type, billing details) on their Preferences screen.

View/Update default references—Allows users to enter or update the reference defaults that the administrator has assigned in the References screen. If this privilege is assigned, the Set up Reference Options button and popup will display on their Preferences screen.

Display pending shipments confirmation — Select this option to always show the Pending Shipment Confirmation receipt whenever a pending shipment is created and saved.

FedEx services

These sections allow the administrator to select any of the available domestic, intra-Canada, international, and special services for a user. By checking Select all, the administrator is giving the user all of the privileges within that section. By checking Apply to return shipments, the administrator is giving the user the ability to use the selected services for processing return shipments.
The References screen allows the administrator to configure information for references users will see on the FedEx Ship Manager screens. These reference configuration options are activated by selecting the appropriate options from the drop-down menus (as required).

A reference is an optional number or a description that appears on your FedEx invoice or within the Shipping Administration administrative reports. You have the option of configuring up to 4 default reference codes that will auto-populate the corresponding reference fields on the FedEx Ship Manager screens when Shipping Administration users log on. Defaults can be entered for Your reference, Department number, PO number, and Invoice number. The Your reference field displays on the Ship screen and the other fields display on the secondary screens.

For FedEx Express shipments, the information entered in the Your reference field will display on your company's FedEx Invoice.

For FedEx Ground shipments, the information entered in the Your reference and PO number fields will display on your FedEx invoice.

All reference fields will display on the Report and in the Shipment Confirmation screen, the Shipment Details, Shipment Record, and Reports for Shipping Administration users.

Shipping Administration users will be able to update certain Preference settings if they have been given the appropriate privilege in the Privileges screen.
Reference name

The reference name options are Your reference, Department number, PO number, and Invoice number.

Validation

Select the appropriate configuration option from the drop-down menu:

**Not required (text field)**—User will view a text entry field on the Ship screen and is not required to enter a reference in order to ship.

**Not required (view list)**—User will view a popup screen after clicking Select on the Ship screen. The user can select any entry and then click OK to continue. The selected reference populates the reference field. The selected references are entered into a reference database or a specific reference list, depending on the administrator’s selection. This option requires the administrator to provide references.

**Required (text field)**—User will view a text entry field on the Ship screen and must enter an alphanumeric entry in the field in order to continue (ship).

**Required (view list)**—User will view a popup screen after clicking Select on the Ship screen. The user must select an entry and then click OK to continue. The selected reference populates the reference field. The selected references are entered into a reference database or a specific reference list, depending on the administrator’s selection. This option requires the administrator to provide references.

**Default and cannot change**—User will view their default reference as text on the Ship screen. The user cannot change the default reference text.

**Required with validation (text field)**—User will view a text field on the Ship screen and must enter a reference that matches one in the database or a specifically assigned list to continue (ship). This option requires the administrator to provide references to validate against.

**Required with validation (view list)**—User will view a popup screen after clicking Select on the Ship screen. The user must select an entry and then click OK to continue. The selected reference populates the reference field. The selected references are entered into a reference database or a specific reference list, depending on the administrator’s selection. This option requires the administrator to provide references to validate against.

List display

Select a reference list from the ones displayed on the Ship screen and validated against. As an administrator, you need to select a list only for reference options that require it.

Reference default

Enter a reference or click Select to display the References screen to choose a reference.

Apply to return shipments

Check the appropriate box to apply the reference settings to return shipments.
Defaults Screen

The Defaults screen allows the administrator to set a number of default options that will users will see on the FedEx Ship Manager screens. These default configuration options are activated by checking the appropriate boxes. If a box is unchecked, this setting is not automatically enabled. Default settings entered here correspond with the options that are available on the Preferences screen.

Shipping Administration users will be able to update certain Preference settings if they have been given the appropriate privilege in the Privileges screen.

Default shipping information

Service type—Select the default FedEx shipping service that you want users to use from the drop-down list. Delivery options vary based on the destination, packaging requirements, delivery time, and cost. If users are shipping via FedEx Freight or FedEx Ground, the type of service is preselected. For a list of service types available using FedEx Ship Manager, go to fedex.com.
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Package type—Select the default type of packaging that users will use from the drop-down list. If users are shipping via FedEx Express Freight or FedEx Ground, Your packaging is the default. For a list of package types available using FedEx Ship Manager, go to fedex.com.

Unit of Measure—Select the unit of measure you use most often from the drop-down menu.

Currency—Select the default currency. Default currency will be USD if another currency is not selected.

Bill shipment to—Select the default billing type (whether shipments will be billed to the Sender, Recipient, or Third party as a default).

Bill shipment to account # (shipping charges)—Select the default FedEx account number if shipments are being billed to Recipient or Third Party.

Bill duties/taxes/fees to—Select whether duties and taxes will be billed to Sender, Recipient, or Third Party (for FedEx Express shipments only).

Bill duties/taxes/fees to account # (duties and taxes)—Select the default FedEx account number if duties and taxes are being billed to the Recipient or Third party.

Pickup/Drop-off

Select the default pickup or drop-off option that users will use.

Customize options

Always remind user to print pending shipments—Sets a reminder to print any pending shipment labels.

Always show shipment confirmation window—Select this option to have the shipment confirmation screen appear after users complete preparations for each shipment.

Display contact ID field—Select this option to have the Recipient ID field displayed on the main ship screen.

Display Standard List Rates—Select this option for users to see the list rate, as well as the rate associated with your FedEx account number, when user selects Get courtesy rate.

View Department

You can view all users in a specific department by clicking the Admin Home tab on the secondary navigation bar. When the Welcome to Shipping Administration screen displays, select a department from the View by dept drop-down menu in the Users section and click Go. A list of users in all departments displays.

To view administrator information for a specific department, click the Admin Home tab on the secondary navigation bar. When the Welcome to Shipping Administration screen displays, select a department from the Update dept drop-down menu in the Departments section and click Go. The Edit department screen displays for that department.
Update Department

To update department information, complete the following steps:

(1) Click **Update dept** within the Departments section of the Welcome to Shipping Administration screen or click **Edit** on the Departments screen. The Edit department screen displays and defaults to the Profile screen.

(2) In the Department details section, the department's name displays in the Company name field. In the Accounts section, the department account(s) displays in the Available accounts area. When updating a department, you can add or remove an account(s) to/from the department by clicking **Add** or **Remove**. You must leave at least 1 account number in the Available accounts area. You can add an account to the department by selecting an existing FedEx account from the Available accounts list. See Profile Screen for more information.
Click **Next**. The Privileges screen displays and includes the Address book, General, Additional preferences, and FedEx services sections. See Privileges Screen for more information.

After completing the Privileges screen, click **Next**. The References screen displays and includes the Reference name, Validation, List display, Reference default, and Apply to return shipments sections. See References Screen for more information.

After completing the References screen, click **Next**. The Defaults screen displays and includes the Default shipping information, Pickup/Drop-off, and Customize options sections. See Defaults Screen for more information.

Click **Save/Update**. The department information is updated. You will return to the Welcome to Shipping Administration screen.

**Note:** If you are updating the department Privileges, References, or Defaults screens, these changes will also apply to existing users in the department that have **Use department privileges, references and defaults** selected. See Add New User section for more details.

**Delete Department**

Departments cannot be deleted unless all users assigned to that department have been deleted or reassigned to another department. If there are no users in the department and the department needs to be deleted, you can delete it as follows:

1. Select the appropriate department and click **Delete**. A delete confirmation screen displays.
2. Click **OK**. The department is removed from the system. You will return to the Departments screen.

**Import Department or Account**

To import a department or an account, access the Departments screen and follow these steps:

1. Before importing a department, ensure that the file is formatted properly. Please refer to the Shipping Administrator Import Guide for detailed instructions on completing the import templates and for the proper layout and format of the data. The file must be saved to a comma-separated values (csv) format prior to importing into Shipping Administration.

   **Note:** A maximum of 250 records can be imported at one time. Therefore, if you need to import more than 250 departments or accounts, you will need to create several files before importing them.

   **Note:** The department(s) and account number(s) that you assign to a user must already be set up in Shipping Administration for your company. The user can only be assigned to an account number that has already been added to the department to which they are being assigned.

   **Note:** For Canadian users, the Saturday Delivery for Freight and Inside pickup/Inside delivery (Freight only) fields default to **No** because those services are not available in Canada.

2. Complete your department import file by entering the required information in the following fields. Although the remaining fields contain FedEx defaults, you can still change them.

   - Company ID
   - Dept ID
   - Dept Name
   - Dept Contact Name
Before importing an account, ensure that the file is formatted properly by entering information in all of the fields as follows:

- Company ID
- Department ID
- Department Name
- Department Contact Name
- FedEx Account Number
- Account - Address 1
- Account - Address 2
- Account – City
- Account - State or Account - Province (Canada)
- Account - Zip code or Account - Postal code (Canada)
- Department Contact Phone Number

Click Import. The import departments screen displays.

Enter the location of your file, or click BROWSE to search for it—Click Browse and select the appropriate file to import (e.g., .csv).
(6) **Select Import action desired**—Select Add New Departments, Update Departments, or Add Account numbers to Departments from the drop-down menu.

(7) Click **Import**. The Importing screen displays showing your import status.

(8) If your import is successful, the Import successful screen displays.

(9) If the imported file exceeds 250 records, the Import error screen displays. Remove some of the records from the file and try to import it again.

(10) If the imported file is uploaded outside of the available timeframe, import it again within the specified timeframes.

(11) If your import is successful but contains errors, the screen displays those errors. Follow these steps:

- Print this error screen.
- Correct the records containing errors and import the file again.
- For reference, copy and paste the error table into a Microsoft® Excel file or print it.

**Export Department**

To export a department, access the Departments screen and follow these steps:

(1) Click **Export**. The Export departments screen displays.

(2) **Select database to export data from**—Select Departments from the drop-down menu.

(3) Click **Export** to export the data. A confirmation screen displays showing that your data has been successfully exported.

**Note:** When you export department files from Shipping Administration, the system defaults to the comma-separated values (csv) format.
Overview

A user is an individual in the company that has been set up by an administrator to access FedEx Ship Manager using Shipping Administration. Users are individuals who are granted administrative privileges as well as those who are only authorized to use the shipping functionality of FedEx Ship Manager.

The Users feature contains the following screens and functionality. You can move between the Profile, Privileges, References, and Defaults screens by clicking Previous or Next.

- **Users**—Displays key information about users, such as the User alias, User name, Department ID, and Status. The administrator can add, update, delete, import, and export users.

- **Profile**—Displays user information in the User details, Accounts available, and User settings sections. See Profile Screen for more information.

- **Privileges**—Displays selected rights and privileges for the user in the Address book, General, Additional preferences, and FedEx services sections. See Privileges Screen for more information.
• References—Displays reference information in the Reference name, Validation, List display, Reference default, and Apply to return shipments sections. See References Screen for more information.

• Defaults—Displays profile information in the Default shipping information, Pickup/Drop-off, and Customize options sections. See Defaults Screen for more information.

When you click on the Users tab, the View all users screen displays. As an administrator, you can perform the following user functions from this screen:

• Search

• Add New User

• View All Users in Company

• View Users by Department

• Update User

• Delete User

• Import User

• Export User

Search

Search by keyword

To search for a user, enter key information in the text field. (This field is case-sensitive.) Select User alias, User name, Department ID, or Status from the drop-down menu. Click Search. The Users screen displays information based on your text entry.

Sort by

You can sort any of the columns by selecting User alias, User name, Department ID, or Status from the drop-down menu. Click Sort. The Users screen sorts the selected column.

Add New User

To add/set up a new user, follow these steps:

1. Click Invite user or Create User within the Users section of the Welcome to Shipping Administration screen. Or, you can click Invite user or Create User on the Users screen.

2. Complete the User details section that identifies the user. (Required fields are in bold). You must assign the user to a department before you can proceed. In the Department field, select a department from the drop-down list and click Assign.

3. Complete the Accounts available section. You can assign the user to a department account by selecting an existing account from the Accounts assigned drop-down menu. See Profile Screen for more information.

4. In the User settings section, select the Use department privileges, references and defaults checkbox to allow the user to view the Privileges, References, and Defaults screens but not make any changes. You can view these settings by selecting View settings. Deselect this checkbox to allow the user to access the Privileges, References, and Defaults screens and make changes. Select Customize privileges, references and defaults to allow the user to
customise the Privileges, References, and Defaults screens. Select **Assign user as an administrator** to allow the user to have administrator privileges.

(5) If you select **Use department privileges, references and defaults**, click **Invite User**. The Users screen displays showing that the new user has been added.

(6) If you select **Customize privileges, references and defaults**, click **Next**. The Privileges screen displays and includes the Address book, General, Additional preferences, and FedEx services sections. See Privileges Screen for more information.

(7) After completing the Privileges screen, click **Next**. The References screen displays and includes the Reference name, Validation, List display, Reference default, and Apply to return shipments sections. See References Screen for more information.

(8) After completing the References screen, click **Next**. The Defaults screen displays and includes the Default shipping information, Pickup/Drop-off, and Customize options sections. See Defaults Screen for more information.

(9) Click **Invite user** or **Create user**. The user information is saved. You will return to the Users screen.

**Profile Screen**

User details

**Department**—Select a department from the drop-down list. You must assign the user to a department before you can proceed. The Profile page will refresh.
User alias—The User alias is the unique name that is assigned to the user when he is initially added. Users are identified by user aliases when searching for or viewing a user profile or when the administrator is running a report. The User alias is a maximum of 10 characters and is alphanumeric. Enter a User alias.

Note: User aliases can be deleted or deactivated, but they cannot be modified.

First name—Enter the first name of this user.

Last name—Enter the last name of this user.

Email—Enter the email address for this user.
Accounts available

In the Accounts available section, assign a user to a department account by selecting an existing account from the Accounts assigned drop-down menu. This account number is the sender account number for billing purposes when the user is logged in to Shipping Administration to ship with FedEx Ship Manager at fedex.com. The Accounts assigned list displays the FedEx account(s) that are available for the department to which the user has been added. The account number is the sender account number when they are using Shipping Administration to ship with FedEx Ship Manager at fedex.com.

You can reassign a user to another FedEx account number at any time.

User settings

In the User settings section, select the Use department privileges, references and defaults checkbox to allow the user to view the Privileges, References, and Defaults screens but not make any changes. Deselect this checkbox to allow the user to access the Privileges, References, and Defaults screens and make changes.

**Note:** If this option is selected, updates made to the department Privileges, References, and Defaults screens will be enforced for this user. If the user is assigned to another department, the new department settings for privileges and defaults will be applied.

**Note:** This setting cannot be used for users that will be assigned administrator privileges.

Select Customize privileges, references and defaults to allow the user to customize the Privileges, References, and Defaults screens.

Select Assign user as department or company administrator to allow the user to have administrator privileges.
Privileges Screen

The Privileges screen allows the administrator to give users in the department certain rights and privileges by checking the appropriate boxes. If a box is unchecked, the user does not have that privilege.
Address book

**Personal address book**—Provides access to the Personal Address Book, where Shipping Administration users can create and manage up to 2,000 recipients from the Address book screen and select from these addresses on the Ship screen.

**Shared address book**—Provides access to the Shared Address Book screen where Shipping Administration users can access the shared address books of other Shipping Administration users in the company for one time use. Shipping Administration users cannot add, edit or delete recipients in a shared address book unless they are the owner of the address book.

**Central address book**—Provides access to recipients in the Central Address Book screen and via the drop-down menu on the Ship screen. Users without Administrative privileges cannot add, edit or delete entries in the Central address book.

**Sender profile/Add new senders**—Allows users to create up to 20 Sender profiles which can be managed from the Sender information screen in the address book. Additional senders can also be selected from the Ship screen when **Change sender address** is selected.

**General**

**Process return shipments** — Select this option to allow the ability to process return shipments. A popup then appears asking for Return Contact Information. Enter the return contact telephone number and an optional e-mail message, and then click Continue. When you select this option, the Create Return Shipment option under the Prepare Shipment tab and the Process a return shipment option in the Special Services section become available to the User.

*Require RMA no.* — Select this option to require a Return Material Authorization (RMA) number for return shipments. The RMA no. field will then show up in the Billing Details section in FedEx Ship Manager.

**Allow user to schedule pickup** — Select this option to allow the User to schedule pickups for shipments. The Pickup/Drop-off section would then show up in FedEx Ship Manager.

**Enable Electronic Trade Documents (ETD)** — Select this option to allow the User to electronically attach customs documents to the shipments. The customs documents will then show up in the FedEx Ship Manager under My Shipment Profiles and in the Product/Commodity Information under Customs Documentation.

**Create pending shipments** — Select this option to allow a User to save a shipment that can be processed later today or on a future date.

**Can only create pending shipments** — Select this option to only allow a User to save a shipment in pending status and not allow the processing and printing of a shipping label.

**Process other users pending shipments** — Select this option to allow a User to finalize other Users’ (who are tied to the same account number) pending shipments and print the shipping label. This option is not available to Users who have been assigned the option to “Can only create pending shipments”.

**Rates and Transit Times**

**Display this section** — This option will allow the user to see the rates and transit time module when preparing a shipment. The sub-options determine which features the user can access.

*Do not display rates (display transit times only)* — Hides account specific rates from the user allows him/her to see transit times.

*Always display all services* — Shows all services that the user can access

*Always show this section expanded* — Shows the Rates and Transit Time section expanded each time the user creates a shipment

*Do not display this section* — Hides the section. Users will have no access to rates or transit times.
Additional preferences (Users can change these settings)

Set up thermal printer—Allows users to access additional printer options by displaying this section under the Customize features section of their Preferences screen. From here users can configure a thermal printer for printing shipping labels to a local thermal printer. If this privilege is not selected, users will only be able to print to a laser or inkjet printer (default).

Set up additional handling charges—Allows users access to these options under the Customize features section of their Preferences screen. From here users can set up additional handling charges (fixed or variable) for both FedEx Express and FedEx Ground shipments. These additional charges will display when the user requests a courtesy rate quote and accesses the shipping details for a particular shipment. This capability allows users to charge back additional costs of the shipment to customers.

View/Update default shipping information—Allows users to access and configure Default shipping information (e.g., default service, package type, billing details) on their Preferences screen.

View/Update default references—Allows users to enter or update the reference defaults that the administrator has assigned in the References screen. If this privilege is assigned, the Set up Reference Options button and popup will display on their Preferences screen.

Display pending shipments confirmation — Select this option to always show the Pending Shipment Confirmation receipt whenever a pending shipment is created and saved.

FedEx services

These sections allow the administrator to select any of the available domestic, intra-Canada, international, and special services for a user. By checking Select all, the administrator is giving the user all of the privileges within that section. By checking Apply to return shipments, the administrator is giving the user the ability to use the selected services for processing return shipments.
The References screen allows the administrator to configure information for references users will see on the FedEx Ship Manager screens. These reference configuration options are activated by selecting the appropriate options from the drop-down menus (as required).

A reference is an optional number or a description that appears on your FedEx invoice or within the Shipping Administration administrative reports. You have the option of configuring up to 4 default reference codes that will auto-populate the corresponding reference fields on the FedEx Ship Manager screens when Shipping Administration users log on. Defaults can be entered for Your reference, Department number, PO number, and Invoice number. The Your reference field displays on the Ship screen and the other fields display on the secondary screens.

For FedEx Express shipments, the information entered in the Your reference field will display on your company's FedEx Invoice.

For FedEx Ground shipments, the information entered in the Your reference and PO number fields will display on your FedEx invoice.

All reference fields will display on the Report and in the Shipment Confirmation screen, the Shipment Details, Shipment Record, and Reports for Shipping Administration users.

Shipping Administration users will be able to update certain Preference settings if they have been given the appropriate privilege in the Privileges screen.
Reference name

The reference name options are Your reference, Department number, PO number, and Invoice number.

Validation

Select one of the configuration options from the drop-down menu:

**Not required (text field)**—User will view a text entry field on the Ship screen and is not required to enter a reference in order to ship.

**Not required (view list)**—User will view a popup screen after clicking Select on the Ship screen. The user can select any entry and then click OK to continue. The selected reference populates the reference field. The selected references are entered into a reference database or a specific reference list, depending on the administrator’s selection. This option requires the administrator to provide references.

**Required (text field)**—User will view a text entry field on the Ship screen and must enter an alphanumeric entry in the field in order to continue (ship).

**Required (view list)**—User will view a popup screen after clicking Select on the Ship screen. The user can select any entry and then click OK to continue. The selected reference populates the reference field. The selected references are entered into a reference database or a specific reference list, depending on the administrator’s selection. This option requires the administrator to provide references.

**Default and cannot change**—User will view their default reference as text on the Ship screen. The user cannot change the default reference text.

**Required with validation (text field)**—User will view a text field on the Ship screen and must enter a reference that matches one in the database or a specifically assigned list to continue (ship). This option requires the administrator to provide references to validate against.

**Required with validation (view list)**—User will view a popup screen after clicking Select on the Ship screen. The user can select any entry and then click OK to continue. The selected reference populates the reference field. The selected references are entered into a reference database or a specific reference list, depending on the administrator’s selection. This option requires the administrator to provide references to validate against.

**List display**

Select a reference list from the ones displayed on the Ship screen and validated against. As an administrator, you need to select a list only for reference options that require it.

**Reference default**

Enter a reference or click Select to display the References screen to choose a reference.

**Apply to return shipments**

Check the appropriate box to apply the reference settings to return shipments.
Defaults Screen

The Defaults screen allows the administrator to set a number of default options (e.g., default services, billing options) that users will see on the FedEx Ship Manager screens. These default configuration options are activated by checking the appropriate boxes. If a box is unchecked, this setting is not automatically enabled. Default settings entered here correspond with the options that are available on the Preferences screen.

Shipping Administration users will be able to update certain Preference settings if they have been given the appropriate privilege in the Privileges screen.

Default shipping information

Service type—Select the default FedEx shipping service that you want users to use from the drop-down list. Delivery options vary based on the destination, packaging requirements, delivery time, and cost. If users are shipping via FedEx Freight or FedEx Ground, the type of service is preselected. For a list of service types available using FedEx Ship Manager, go to fedex.com.
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Package type—Select the default type of packaging that users will use from the drop-down list. If users are shipping via FedEx Express Freight or FedEx Ground, Your packaging is the default. For a list of package types available using FedEx Ship Manager, go to fedex.com.

Unit of Measure—Select the unit of measure you use most often from the drop-down menu.

Currency—Select the default currency. Default currency will be USD if another currency is not selected.

Bill shipment to—Select the default billing account number or billing type (whether shipments will be billed to the Sender, Recipient, or Third party as a default).

Bill shipment to account # (shipping charges)—Select the default FedEx account number if shipments are being billed to Recipient or Third Party.

Bill duties/taxes/fees to—Select the default billing account number or billing type (whether shipments will be billed to the Sender, Recipient, or Third party as a default). (for FedEx Express shipments only).

Bill duties/taxes/fees to account # (duties and taxes)—Enter the default FedEx account number if duties and taxes are being billed to the Recipient or Third party.

Pickup/Drop-off

Select the default pickup or drop-off option that users will use.

Customize options

Always remind user to print pending shipments—Sets a reminder to print any pending shipment labels.

Always show shipment confirmation window—Select this option to have the shipment confirmation screen appear after users complete preparations for each shipment.

Display contact ID field—Select this option to have the Recipient ID field displayed on the main ship screen.

Display Standard List Rates—Select this option for users to see the list rate, as well as the rate associated with your FedEx account number, when user selects Get courtesy rate.

View All Users in Company

As an administrator, you can view a list of Shipping Administration users in the entire company or only those users in a particular department. From this list, select a user to update or view, or delete the user completely from the user database.

To view all users in the company, click the Users tab in the secondary navigation bar. The Users screen displays all of the users in the company grouped and sorted by department. Another way to view all of the users is to select View all users from the Filter by department drop-down menu. The Users screen displays all of the users in the company grouped and sorted by department.

Expired Status

If Expired is displayed beside the user alias in the Status column, that user has not accepted the invitation before it expired. Expired status allows administrators to keep track of who did or did not accept the invitation. Expired users will have to be reinvited or deleted by the administrator. (The system will not remove them automatically.)
View Users by Department

To view users by department, select a department from the Filter by department drop-down menu. The resulting Users screen displays a list of all of the users in that department. This list includes the User alias, User name, Department ID, and Status columns for each user.

You can also view users by a department by clicking the Admin Home tab on the secondary navigation bar. When the Welcome to Shipping Administration screen displays, select the appropriate department from the View by dept drop-down menu in the Users section and click Go. The resulting Users screen displays a list of all of the users in that department.

Expired Status

If Expired is displayed beside the user alias in the Status column, that user has not accepted the invitation before it expired. Expired status allows administrators to keep track of who did or did not accept the invitation. Expired users will have to be reinvited or deleted by the administrator. (The system will not remove them automatically.)

Update User

To update user information, complete the following steps:

1. Click Update user within the Users section of the Welcome to Shipping Administration screen or click Edit on the Users screen. The Edit user screen displays and defaults to the Profile screen.

2. In the User details section, the user information displays. In the Accounts available section, the department account displays in the Accounts assigned area. You can assign the user to a different department account by selecting an existing account from the Accounts assigned drop-down menu. See Profile Screen for more information.

3. If you select Use department privileges, references and defaults, click Invite User. The Users screen displays showing that the new user has been added.

4. If you select Customize privileges, references and defaults, click Next. The Privileges screen displays and includes the Address book, General, Additional preferences, and FedEx services sections. See Privileges Screen for more information.

5. After completing the Privileges screen, click Next. The References screen displays and includes the Reference name, Validation, List display, Reference default, and Apply to return shipments sections. See References Screen for more information.

6. After completing the References screen, click Next. The Defaults screen displays and includes the Default shipping information, Pickup/Drop-off, and Customize options sections. See Defaults Screen for more information.

7. Click Save/Update. The user information is updated. You will return to the Users screen.

Reassign User to Another Department

If you want to reassign a user to another department, select the appropriate department from the Filter by department drop-down menu within the Users screen. The resulting Users screen displays a list of all of the users in that department. Update the user profile and reassign the user to an alternate FedEx account number.

Note: If Use department privileges, references and defaults is selected, then the privileges, references, and defaults settings for the new department will be enforced. Also, if a user is reassigned to another department, past shipping activity for that user will display under the old department ID.

Delete User

To delete a user profile, access the Users screen and follow these steps:
(1) Select the appropriate user and click Delete. A delete user confirmation screen displays.

(2) Click OK. The user is removed from the system. You will return to the Users screen.

Import User

To import a user profile, access the Users screen and follow these steps:

(1) Before importing a user file, ensure that the file is formatted properly. Please refer to the Shipping Administration Import Guide for detailed instructions on completing the import templates and for the proper layout and format of the data. The file must be saved to a comma-separated values (csv) format prior to importing into Shipping Administration.

**Note:** A maximum of 250 records can be imported at one time. Therefore, if you need to import more than 250 users, you will need to create several files before importing them.

**Note:** The department(s) and account number(s) that you assign to a user must already be set up in Shipping Administration for your company. The user can only be assigned to an account number that has already been added to the department to which they are being assigned.

**Note:** For Canadian users, the Saturday Delivery for Freight and Inside pickup/Inside delivery (Freight only) fields default to No because those services are not available in Canada.

(2) Complete your import file by entering the required information in the following fields. Although the remaining fields contain FedEx defaults, you can still change them.

- Company ID
- Department ID
- User Name
- User ID
- Password
- Address 1
- Address 2
- City
- State or Province (Canada)
- Zip code or Postal code (Canada)
- Phone number
- Email
- FedEx Account Number
- Inherit Department setting for
- Deactivate User
Admin Privileges

(3) Click Import. The Import users screen displays.

(4) Enter the location of your file, or click BROWSE to search for it—Click Browse and select the appropriate file to import (e.g., .csv).

(5) Select Import action desired—Select Invite New Users from the drop-down menu.

(6) Click Import. The Importing screen displays showing your import status.

(7) If your import is successful, the Import successful screen displays.

(8) If the imported file exceeds 250 records, the Import error screen displays. Remove some of the records from the file and try to import it again.

(9) If the imported file is uploaded outside of the available timeframe, import it again within the specified timeframes.

(10) If your import is successful but contains errors, the screen displays those errors. Follow these steps:

- Print this error screen.
- Correct the records containing errors and import the file again.
- For reference, copy and paste the error table into a Microsoft® Excel file or print it.

Export User

To export a user profile, access the Users screen and follow these steps:

(1) Click Export. The Export users screen displays.

(2) Select database to export data from—Select Users from the drop-down menu.

(3) Click Export to export the data. A confirmation screen displays showing that your data has been successfully exported.

**Note:** When you export user files from Shipping Administration, the system defaults to the comma-separated values (csv) format.
References

Overview

A reference is an optional number or a description that appears on your FedEx invoice or within the Shipping Administration administrative reports. You have the option of configuring up to 4 default reference codes that will auto-populate the corresponding reference fields on the FedEx Ship Manager screens when Shipping Administration users log on. Defaults can be entered for Your reference, Department number, PO number, and Invoice number.

For FedEx Express shipments, the information entered in the Your reference field will display on your company's FedEx Invoice.

For FedEx Ground shipments, the information entered in the Your reference and PO number fields will display on your FedEx invoice.

All reference fields will display on the Report and in the Shipment Confirmation screen, the Shipment Details, Shipment Record, and Reports for Shipping Administration users.
The References feature contains the following screen:

References—Displays key information about references, such as the reference ID and reference description. In addition to adding and updating references, the administrator can also create and edit a reference list and add a reference to a reference list.

Note: References are validated at the user and department levels. See Validation in the Users section and Departments section for more details.

With the References feature, you can perform the following functions:

- Search
- View References
- Add New Reference
- Update Reference
- Delete Reference
- Import Reference
- Export Reference
- View Reference List
- Add New Reference List
- Update Reference List
- Add References to Reference List
- Delete Reference List

Search

Search by keyword

To search for a reference, enter key information in the text field. (This field is case-sensitive.) Select Reference ID or Reference description from the drop-down menu. Click Search. The References screen displays information based on your text entry.

Sort by

You can sort any of the columns by selecting the appropriate column heading from the Sort by drop-down menu (e.g., Reference ID). Click Sort. The References screen sorts the selected column. You can also sort any of the columns by selecting the underlined column heading.

View References

You can view references in a company by clicking References in the secondary navigation bar.
To add a new reference, follow these steps:

1. Click **Create new reference** on the References screen. The Add reference screen displays.
2. Enter the appropriate information in the Reference ID and Reference description fields. (The maximum number of characters allowed for the Reference ID field is 24. The maximum number of characters allowed for the Reference description field is 35. These fields are case-sensitive. Do not use special characters.)
3. Select 1 or more of the reference names (**Your reference**, **Department number**, **PO number**, or **Invoice number**). You must select at least 1 reference name.
4. Click **Save/Update**. The reference information is added. You will return to the References screen.
5. If you want to save this new reference and add another one, click **Save/Add another reference**. The reference information is saved and you can add another reference.

**Note:** You can only add 1 reference at a time.
Update Reference

To update reference information, access the References screen and follow these steps:

1. Select the appropriate reference and click **Edit**. The Edit reference screen displays.
2. Make your changes to the Reference ID and Reference description entries as needed. Do not use special characters.
3. Make changes to the reference names by selecting or deselecting them. You must select at least 1 reference name.
4. Click **Save/Update**. The reference information is updated. You will return to the References screen.

**Note:** You can only edit 1 reference at a time.

Delete Reference

To delete a reference, access the References screen and follow these steps:

1. Select the appropriate reference and click **Delete**. A delete confirmation screen displays.
2. Click **OK**. The reference is removed from the system. You will return to the References screen.

Import Reference

To import a reference, access the References screen and follow these steps:

1. Before importing a reference, ensure that the file is formatted properly. Please refer to the *Shipping Administration Import Guide* for detailed instructions on completing the import templates and for the proper layout and format of the data. The file must be saved to a comma-separated values (csv) format prior to importing into Shipping Administration.

   **Note:** A maximum of 5,000 records can be imported at one time. Therefore, if you need to import more than 5,000 references, you will need to create several files before importing them. The maximum number of references allowed is 250,000.

2. Complete your reference import file by entering the required information in the appropriate fields. Although the remaining fields contain FedEx defaults, you can still change them.
3. Click **Import**. The Import references screen displays.
4. Enter the location of your file, or click BROWSE to search for it—Click **Browse** and select the appropriate file to import (e.g., .csv).
5. Select **Add** or **Replace**.
6. Click **Import**. The Importing screen displays showing your import status.

   **Note:** Do not close this screen while importing is in progress, since this will cancel the importing process.

7. If your import is successful, the Import successful screen displays.
8. If the imported file exceeds 5,000 records, the Import error screen displays. Remove some of the records from the file and try to import it again.
9. If the imported file is uploaded outside of the available timeframe, import it again within the specified timeframes.
If your import is successful but contains errors, the screen displays those errors. Follow these steps:

- Print this error screen.
- Correct the records containing errors and import the file (or records with errors) again.
- For reference, copy and paste the error table into a Microsoft® Excel file or print it.

**Export Reference**

To export a reference, access the References screen and follow these steps:

1. Click **Export**. The Export references screen displays.
2. **Select database to export data from**—Select **References** from the drop-down menu.
3. Click **Export** to export the data. A confirmation screen displays showing that your data has been successfully exported.

**Note:** When you export reference files from Shipping Administration, the system defaults to the comma-separated values (csv) format.

**View Reference List**

To view a reference list, access the References screen and follow these steps:

1. Click **Reference lists**. The Reference lists screen displays.
   
   **Note:** If you have already developed a reference list or you want to create a new reference list, the Reference lists screen will be blank.

2. Perform a search by keyword or sort any of the columns in the same manner as explained in the Search section for the References screen.

3. To return to the References screen, click **References** at the bottom or on the secondary navigation bar at the top.

   **Note:** If you assign a department or a user to a specific reference list, choose one of the validation options that requires validation against a list, and receive a blank list (no references), the user will not be able to ship.

**Add New Reference List**

To add a new reference list, access the References screen and follow these steps:

1. Click **Reference lists**. The Reference lists screen displays.
2. Click **Create new reference list**. The Create reference list screen displays.
3. Enter a reference list identifier in the Reference list ID field and a reference list name in the Reference list name field. The Reference list description field is optional.
4. In the Select references to add area on the left, choose a reference (or press **Shift** and **Ctrl** to select multiple references) and click **Add**. This moves the selected reference(s) to the References added to list area on the right. You can remove a reference(s) from the References added to list area back to the Select references to add area by clicking **Remove**.
5. Click **Save/Update**. The References list screen displays with the new list.
Update Reference List

To edit a reference list, access the References screen and follow these steps:

1. Click **Reference lists**. The Reference lists screen displays.
2. Select the appropriate reference list ID and click **Edit**. The Edit reference list screen displays.
3. In the Select references to add area on the left, choose a reference(s) and click **Add**. This moves the selected reference(s) to the References added to list area on the right. You can remove a reference(s) from the References added to list area back to the Select references to add area by clicking **Remove**.
4. Click **Save/Update**. The References list screen displays with the updated list.

Add References to Reference List

To add 1 or more references to a reference list, access the References screen and follow these steps.

**Note:** You do not have to create a reference list to access your references. You can keep your references on the References screen and use them from here.

1. Select the designated references.
2. Choose the appropriate reference list from the Add to Reference list drop-down menu. The chosen reference list now includes the added references.

Delete Reference List

To delete a reference list, access the References screen and follow these steps:

1. Click **Reference lists**. The Reference lists screen displays.
2. Select the appropriate reference list and click **Delete**. A delete confirmation screen displays.
3. Click **OK**. The reference list is removed from the system. You will return to the Reference list screen.
Overview

As a Shipping Administrator, you can create, add, edit, and delete reports for any shipment you have processed using FedEx Ship Manager® in the past 45 days. Reports can be generated directly from the Reports box on the main Shipping Administration screen. To access the separate Admin report manager screen, click Admin Reports tab on the navigation bar.

With the Admin Reports feature, you can perform the following functions:

- Create Reports
- Add New Reports
- Edit Reports
- Delete Reports
- Access Shipping Administration Report Results
Create Reports

You can create and print reports for any shipment that has been processed using FedEx Ship Manager in the past 45 days. After viewing the report, click on a tracking number to display tracking details. These reports allow you to track the status of shipments generated by Shipping Administration users throughout the company for each individual department.

To create a report from a list of existing saved reports, click on the Admin Reports tab on the secondary navigation bar. When the Admin report manager screen displays, follow these steps:

1. Select a report from the Select report drop-down menu.

2. Select a beginning date and ending date for the report from the Beginning date and Ending date drop-down menus.

3. Click Create report to generate the report. You can view and print the entire report, or track any shipment from within your report by clicking on the tracking number. You can download the entire report by saving it to a location of your choosing on your hard drive in comma-separated values (.csv) format.
Add New Report

FedEx Ship Manager® Shipping Administration

Add Report

You can create and print reports for any shipment that has been processed using FedEx Ship Manager at fedex.com in the past 45 days.

1. Select Department

Select department: All departments

2. Select Dates

Select the dates for the report that you would like created.
Beginning date: [Input]
Ending date: [Input]

3. Select Fields

- Select all
- [Option] Sender User alias
- [Option] Department ID
- [Option] Sender information
- [Option] Ship date
- [Option] Tracking no.
- [Option] Service type
- [Option] Payment type
- [Option] Bill transportation to
- [Option] Bill duties/taxes/fees to
- [Option] Recipient information
- [Option] Weight
- [Option] Your reference
- [Option] P.O. no.
- [Option] Invoice no.
- [Option] Department no.
- [Option] Processed by
- [Option] Processed by User alias
- [Option] Company
- [Option] Package type
- [Option] Purpose
- [Option] Signature options
- [Option] RMA no.
- [Option] Courtesy rate quote
- [Option] Standard List Rate
- [Option] Effective net discount
- [Option] Return shipment type
- [Option] Return shipment details

Select Sort Fields (optional)

If you do not want a sorted report, do not select anything.
Sort 1: Select
Sort 2: Select
Sort 3: Select

If you select subtotal, your report will be grouped and subtotalled according to the sort options you have selected.
- Subtotal report

Select Report Name (optional)

If you want to save this report, check this option and enter a report name.
- Save report

[Button] Cancel
[Button] Create report

Please note:
- Dates will not be saved in the report settings.
- Any shipments completed with Standard List Rates selected in Preferences will display on the report.
- Standard List Rates will only display for U.S. domestic affiliates.
You can add a new report for any shipment you have processed using FedEx Ship Manager in the past 45 days. To add a new report, follow these steps:

1. From the Admin report manager screen, click **Add new report**. The Add report screen displays.

2. Select a department from the Select department drop-down menu. Reports can be run individually for each department or you can select **All departments** to run reports for all of the departments in your company.

3. In the next section, select the fields you want to include in the report.

4. If you want to sort the report, select the fields you want to sort by from the Sort 1, Sort 2, and Sort 3 drop-down menus. If you do not want a sorted report, do not select any sort option.

5. Select **Subtotal report** to have your report grouped and subtotaled according to the sort options you have selected.

6. If you want to save your report, select the **Save report as** option and enter a report name. A maximum of 25 administrative report configurations can be saved.

7. Select a beginning date and ending date for the report from the Beginning date and Ending date drop-down menus.

8. Click **Create report** to generate the report. You can view and print the entire report, or track any shipment from within your report by clicking on the tracking number. You can download the entire report by saving it to a location of your choosing on your hard drive in comma-separated values (.csv) format.

   **Note:** Dates will not be saved in the report settings. Any shipments completed with list rates selected in Preferences will display on the report.

9. Click **Clear fields** to clear all fields. Click **Cancel** to return to the Admin report manager screen.

**Edit Reports**

You can edit the settings for an existing report and save or update them to create a new report under a new name. To edit a report, follow these steps:

1. From the Admin report manager screen, select a report from the Select report drop-down menu.

2. Click **Edit report**. The Edit report screen for that department displays.

3. Make your changes and click **Create report**. The updated report displays. You can view and print the entire report, or track any shipment from within your report by clicking on the tracking number. You can download the entire report by saving it to a location of your choosing on your hard drive in comma-separated values (.csv) format.

   **Note:** Dates will not be saved in the report settings. Any shipments completed with list rates selected in Preferences will display on the report. Also, list rates will only display for U.S. domestic shipments.

**Delete Reports**

You can delete a report for any shipment you have processed using FedEx Ship Manager in the past 45 days. To delete a report, follow these steps:

1. From the Admin report manager screen, select a report from the Select report drop-down menu.

2. Click **Delete**. A delete confirmation screen displays.

3. Click **OK**. The report is deleted from the system.
Shipping Administration Report Results

Once the Shipping Administration Shipping Report is generated, you can view, print, or download the report, or track any shipment from within your report.

(1) To track a shipment in the report, click on the Tracking number. The track details are listed for this shipment.

(2) To print this report, click Print.

(3) To download this report to your computer, click Download. You are asked to type the location or use the Browse button to select the location.

(4) Select file type All files if this is not already selected and add .csv extension at the end of the file name.

(5) If you want to create a new report, click Return to Reports to return to the Admin report manager screen.
Accounts

Overview

Accounts are the FedEx accounts that you own and are administering. Administrators can assign multiple accounts to a department. All Users must be assigned to an Account. Users cannot ship from multiple accounts.

The Account feature includes the following screens and functionality:

- View, Search and Sort Accounts
- Edit Accounts
- Delete Accounts
- Add Accounts
When you click on the **Accounts** tab, the Accounts screen displays. As an administrator, you can perform the following account functions from this screen:

- View all accounts
- Search by account number or nickname
- Sort by account number or nickname
- Edit
- Delete
- Add
- View Departments assigned to account

**Search**

**View Accounts**—Click the **Accounts** tab on the Shipping Administration screen to view a list of existing Accounts.

**Search or Select Accounts to Display**

- To **Search** — Enter your search criteria in the Search text box, select the field to search from the drop-down menu, and click Go.
- To **View** — Click **All** or a letter or number from the View Options section.

**Sort Accounts**—You can choose one of the following options:

1. Select a column from the Sort By menu.
2. Click a column header to sort the column in ascending or descending order.
View Departments Assigned to an Account

(1) Select the Account, and click View Departments.

(2) The Accounts screen will display, showing all Departments assigned to that Account.

Edit an Account

Only the account nickname can be edited.

(1) On the Accounts screen, select an existing Account, and click Edit.
(2) Next, edit the account nickname

(3) Click Save to save the changes or Cancel to discard changes.

Delete an Account

(1) Select the Account, and click Delete.

(2) Click OK to confirm the deletion and remove the Account from the system.

Add a New Account

You can add established accounts to be controlled in Shipping Administration.
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(1) On the Accounts screen, click Add.

(2) The Add New Account screen will display. Enter the account information. The address information entered here must match the physical address that was provided to FedEx for this account. It may be different than the address entered in the Department Profile.

(3) Click Save to save the changes or Cancel to discard changes.
Central Address Book

Overview

The FedEx Ship Manager Central Address Book allows you to set up a company-wide address book by selecting recipients from your Personal Address Book. Up to 25,000 recipients can be stored in the Central Address Book, along with all of their shipping defaults. If Shipping Administration users are given the privilege to use the Central Address Book in their user profile, then they are able to access the Central Address Book from their Address Book screen and from the drop-down menu selections on the Ship screen. Shipping Administration users are not able to add, modify, or delete recipients from the Central Address Book.

Central Address Book recipients cannot be customized. Groups cannot be created or accessed in the Central Address Book.

In addition to their Personal Address Book, a Shipping Administration user might also have access to a Central Address Book and a Shared Address Book. The Shipping Administrator determines what address book options are available to Shipping Administration users. To access the Personal Address Book, Shared Address Book, and Central Address Book, click on the Address Book tab on the primary navigation bar.
Personal Address Book—Click Personal in the secondary navigation bar to view your own list of recipients. You can add, change, and delete users from your Personal Address Book.

If you would like to share your Personal Address Book addresses with other Shipping Administration users in your company, select 1 or more addresses and click Share. When you add a new user or address to your Personal Address Book and want to share that address, click Create new address. When the address information screen displays, select the Add to Shared Address Book checkbox in the Save information section.

When adding an address, you can also select the Hide account number if address is shared checkbox in the Shipping-specific options section to hide the account number.

To move an address to the Central Address Book, select the address and click Move to central.

Shared Address Book—If you have the appropriate permission, you can view the Shared Address Book of another Shipping Administration user, but you cannot make any changes to it. To view a Shared Address Book, click Shared in the secondary navigation bar. Then enter the Shipping Administration User ID of the person who is sharing their address book and click View. You can also select a department and click View. When the screen refreshes and displays the user ID list for that department, select the appropriate user ID and click View.

If you would like to share your Personal Address Book addresses with other Shipping Administration users in your company, select 1 or more addresses and click Share. When you add a new user to your Personal Address Book and want to share that address, click Create new address. When the address information screen displays, select the Add to Shared Address Book checkbox in the Save information section.

Central Address Book—Click Central in the secondary navigation bar to view the list of recipients available to all Shipping Administration users associated with the same Company ID. If a Central Address Book is in use, recipients display with your personal addresses in the drop-down menu selections on the Shipping screen.

To move a Personal Address Book address to the Central Address Book, select the address and click Move to central. If you are an administrator and want to move 1 or more addresses from the Central Address Book to the Personal Address Book, select the address(es) and click Move to personal.

Only those with Shipping Administrator access can manage and make changes to the Central Address Book.

Display Specific Entries

To access the Central Address Book and display specific entries, follow these steps:

1. To access the Central Address Book, click the Address Book tab on the primary navigation bar. The Personal Address Book screen displays.

2. Click Central in the secondary navigation bar. The Central Address Book screen displays.

3. In the Search by keyword section, enter a keyword based on the recipient's first or last name or other criteria (e.g., company, city, state). Select the keyword description (e.g., Contact name, Recipient ID) from the drop-down menu and click Search. The Central Address Book displays the information based on your selected search features.

4. In the Sort by section, select an option (e.g., Contact name, Recipient ID) from the drop-down menu and click Sort. The Central Address Book displays entries based on your selected option. You can also display recipients by selecting a letter of the alphabet starting with the first letter. Results are displayed on a first-name basis.

Add New Central Address Book Entry from Personal Address Book

To add a recipient to the Central Address Book from your Personal Address Book, follow these steps:

1. Access the Personal Address Book by clicking the Address Book tab on the primary navigation bar. The Personal Address Book screen displays.
Select a recipient and click **Move to central**. The recipient is added to the Central Address Book.

### Move Central Address Book Entry to Personal Address Book

To move a recipient from the Central Address Book to your Personal Address Book, follow these steps:

1. Access the Central Address Book by clicking the **Address Book** tab on the primary navigation bar. The Personal Address Book screen displays.
2. Click **Central** in the secondary navigation bar. The Central Address Book screen displays.
3. Select a recipient and click **Move to personal**. The recipient is moved to your Personal Address Book.

### Create Central Address Book Entry

To create a new Central Address Book entry, follow these steps:

1. Access the Central Address Book by clicking the **Address Book** tab on the primary navigation bar. The Personal Address Book screen displays.
2. Click **Central** in the secondary navigation bar. The Central Address Book screen displays.
3. Click **Create new address**. Enter all address information and all optional address information.
4. Click **Save/Update** to save all of your changes.

### Update Central Address Book Entry

To update information for a recipient in the Central Address Book, follow these steps:

1. Access the Central Address Book by clicking the **Address Book** tab on the primary navigation bar. The Personal Address Book screen displays.
2. Click **Central** in the secondary navigation bar. The Central Address Book screen displays.
3. Select the recipient and click **Edit**. You can also click on the recipient to edit the information.
4. After modifying the information, click **Save/Update** to save all of your changes.

### Duplicate Central Address Book Entry

To duplicate a Central Address Book entry, follow these steps:

1. Access the Central Address Book by clicking the **Address Book** tab on the primary navigation bar. The Personal Address Book screen displays.
2. Click **Central** in the secondary navigation bar. The Central Address Book screen displays.
3. Click **Duplicate**. The recipient information is duplicated in the Central Address Book.

### Delete Central Address Book Entry

To delete a recipient from the Central Address Book entry, follow these steps:
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(1) Access the Central Address Book by clicking the Address Book tab on the primary navigation bar. The Personal Address Book screen displays.

(2) Click Central in the secondary navigation bar. The Central Address Book screen displays.

(3) Select a recipient and click Delete. The recipient is deleted from the Central Address Book.

Check Address of Central Address Book Entry

To check a recipient’s address in the Central Address Book, follow these steps:

(1) Access the Central Address Book by clicking the Address Book tab on the primary navigation bar. The Personal Address Book screen displays.

(2) Click Central in the secondary navigation bar. The Central Address Book screen displays.

(3) Select a recipient and click Check address. The software verifies that the recipient’s address is valid.

Customize Your Central Address Book

To customize your Central Address Book, follow these steps:

(1) Access the Central Address Book by clicking the Address Book tab on the primary navigation bar. The Personal Address Book screen displays.

(2) Click Central in the secondary navigation bar. The Central Address Book screen displays.

(3) Click Customize. Use the resulting Customize screen to rearrange columns, control the number of entries per page, and turn confirmation messages on or off.

Import Addresses into Central Address Book

To import addresses into your Central Address Book, follow these steps:

(1) Access the Central Address Book by clicking the Address Book tab on the primary navigation bar. The Personal Address Book screen displays.

(2) Click Central in the secondary navigation bar. The Central Address Book screen displays.

(3) Click Import. When the Import Addresses screen displays, click Browse in the File to import field and select the appropriate file to import (e.g., ASCII). Select the type of import file in the File type drop-down menu.

(4) Select Add to Address Book or Replace Address Book in the Import option field.

(5) Click Import.

Export Addresses from Central Address Book

To export addresses from your Central Address Book, follow these steps:

(1) Access the Central Address Book by clicking the Address Book tab on the primary navigation bar. The Personal Address Book screen displays.

(2) Click Central in the secondary navigation bar. The Central Address Book screen displays.
Select specific recipients or all of the recipients (records). Click Export. When the Export Central Address Book screen displays, you can export all of the records or selected records based on your selection. In the File format field, confirm that the default format (.csv) displays.

Click Export.

Ship to Recipient in Central Address Book

To ship to a recipient in the Central Address Book, follow these steps:

(1) Access the Central Address Book by clicking the Address Book tab on the primary navigation bar. The Personal Address Book screen displays.

(2) Click Central in the secondary navigation bar. The Central Address Book screen displays.

(3) Select the recipient and click Ship. The recipient information auto-populates the Ship screen. Alternatively, select the recipient from the drop-down menu options on the Ship screen.

If there are multiple Shipping Administrators, all of the administrators will be able to edit, delete, or move the recipient back to their Personal Address Book. If the recipient is removed from the Central Address Book by selecting Move to personal, the recipient will be moved to the administrator's address book.
Log out

To log out of Shipping Administration, click **Log out** on the secondary navigation bar of any screen. This logs you out of Shipping Administration and returns you to the FedEx Ship Manager® at fedex.com login screen.