



Shipping Administration with
FedEx Ship Manager[®] at [fedex.com](https://www.fedex.com)

[Click here for details.](#)





Getting Started

GETTING STARTED

DEPARTMENTS

ADMINISTRATORS

ESTABLISHING
USERS

ACCOUNTS

REPORTS AND
CONTACTS



Getting Started

Congratulations on choosing to utilize the Shipping Administration features of FedEx Ship Manager® at fedex.com. Shipping Administration will give you increased control, visibility, efficiency, cost management and reporting options for your FedEx account(s).

This interactive PDF was designed to help you make the right setup decisions for your needs, walking you through the setup process. It will show you how to restrict user capabilities, determine references, mandate what reference fields are required, set defaults for "one click" shipping and provide more efficient shipping for users.



Departments

GETTING STARTED

DEPARTMENTS

ADMINISTRATORS

ESTABLISHING
USERS

ACCOUNTS

REPORTS AND
CONTACTS



Departments

What are departments and how can you set them up?

- By location
- By function
- By account number

A “department” is a profile for a group of users. This group can be defined by any criteria that fit the needs of the company — including function, location or account number. Members of a department can share certain default settings, service restrictions, privileges and other characteristics, or members can be customized individually. Each department allows the administrator to centrally manage and control shipments for multiple users and run reports.

Please note that a department can have multiple account numbers, but each user can have access to only one account number.

[Click here for details.](#)



Choosing Department Privileges

As administrator, you will set up the department's privileges first. When you set up individual users later on in the process, you can decide if an individual user will inherit all department privileges, or you can customize privileges on a case-by-case basis.

Choosing services:

- Do you want to restrict the FedEx service types allowed?
- Do you want to set a default FedEx service type?

When defining a department's privileges, you may make any or all FedEx® services available. Limiting available services based on your company's actual shipping needs and patterns is a powerful cost control tool — preventing the unnecessary use of premium services. Alternately, making more options available to a department can ensure that the appropriate service is ready to use whenever a department needs it. You may also set a default service type and a default package type to simplify shipping for your users.

Displaying rates:

- Do you want your users to see your account's specific rates?
- Do you want your users to see FedEx standard list rates?

By allowing your users to see your rates, you enable more cost-effective shipping choices. You can also hide your rates from your vendors or any other users who should not or need not see them. For users allowed to see rates, you may also display FedEx standard list rates. This way, a user may see the rate to charge back to your client.

Address books:

- When should I allow personal address books?
- When should I allow personal address book sharing?
- When should I allow central address book?

As administrators, you can grant users access to a personal address book (where they can share addresses with other users) and a central address book available to all users. The personal address book is maintained and seen only by that user. This is ideal if each user will have largely different shipping destinations or if there is reason to preserve the confidentiality of addresses. You can also allow users to share their personal address books so they can choose which users in the company have access to their addresses. The central address book allows all users to see and use a common list of addresses which can only be updated by the company administrator(s). This is ideal if all or many users are shipping to the same locations (internal or external). Please note that users without administrative privileges cannot add, edit or delete records in the central address book.



GETTING STARTED

DEPARTMENTS

ADMINISTRATORS

ESTABLISHING
USERS

ACCOUNTS

REPORTS AND
CONTACTS

Choosing Department Privileges (cont.)

Returns:

- Do you want users to process returns?
- If users will process returns, will you require a Return Materials Authorization (RMA) number?

When choosing allowed FedEx® services, you can simultaneously enable the same services for use with return shipments. When users have a return shipment option, they can configure return functionality, which will display on the Ship screen. The administrator can require the use of an RMA number to provide greater invoicing clarity.

References and validation of references:

- Do you want to use and require references?
- Do you want to require validation of references?

A reference is a number or a description that can be attached to particular shipping activities chosen and defined by you. The reference will appear on your company's FedEx invoice to aid the internal billing process. Using references makes the most sense for shipping activity that requires certain codes for internal billing purposes, such as a GL code or a client-matter number.

If you choose a defined set of codes for the reference field — and no other codes can be used — you can import the references into Shipping Administration and set the system to validate against them. This will require users to have valid references before they are allowed to process a package. This is useful when you want to bill back a department based on their department number, or bill a client based on their client-matter number. Validation of references is set up by the administrator at the same time reference fields are created.

When you have made your decisions about department privileges and requirements, you are ready to set up your departments on FedEx Ship Manager® at fedex.com. Click here to see step-by-step instructions.

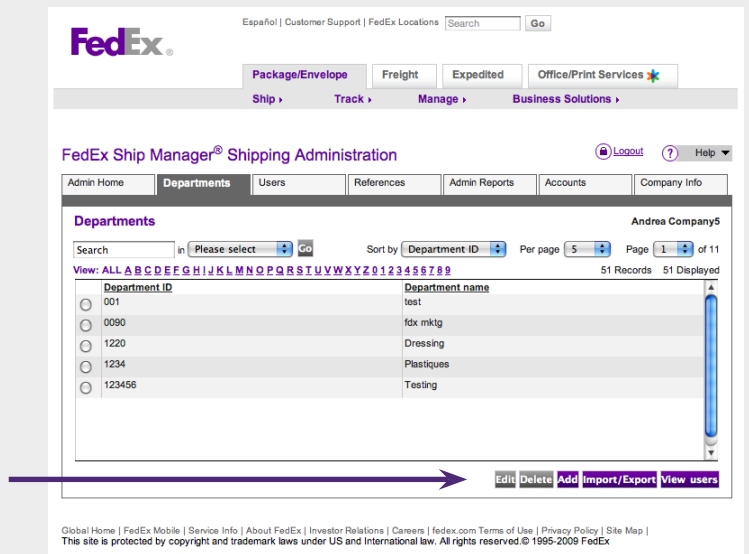
Create Departments Now

Add new department

1. At the Welcome to Shipping Administration screen, click the *Departments* tab. Then click the "Add" button.
2. Complete the "Department details" section that identifies the department.
3. Complete the "Accounts" section. You can add an account to the department by selecting an existing FedEx account from the drop-down list of Available Accounts or by adding a new FedEx account number.

Note: To add an existing account into Shipping Administration, the address information must match the shipping account address information provided by FedEx. It can be different than the address entered in the department profile.

4. Click "Continue." The Privileges screen is displayed and includes the Address Book, General, Additional Preferences and FedEx services sections.
5. Complete the Privileges screen and click "Continue." The References screen is displayed and includes the Reference name, Validation, List display, Reference default and Apply to return shipment sections.
6. Complete the References screen and click "Continue." The Defaults screen is displayed and includes the Default Shipping Information, Pickup/Drop-off and Customize Options sections.
7. Click "Save." You will return to the Departments screen.



Create Departments Now (cont.)

Update department

1. At the Welcome to Shipping Administration screen, click the *Departments* tab. Select the radio button by the desired department and click "Edit."
2. By clicking "Add" or "Remove," you can add an account to or remove an account from the department. At least one account must be left in the Available Accounts area.
3. Select an account in the Available Accounts area and click "Edit account." Make your changes and click "Save."
4. Click "Continue." The Privileges screen will be displayed. Edit the information and click "Continue."
5. After completing the References screen, click "Continue." The defaults screen will be displayed.
6. Click "Save." The department information is now updated. You will automatically return to the Departments screen.

The screenshot shows the FedEx Ship Manager Shipping Administration interface. At the top, there is a search bar and navigation tabs for Package/Envelope, Freight, Expedited, and Office/Print Services. Below this, there are tabs for Ship, Track, Manage, and Business Solutions. The main header reads "FedEx Ship Manager® Shipping Administration" with a Logout button and a Help icon. A navigation bar includes Admin Home, Departments (selected), Users, References, Admin Reports, Accounts, and Company Info. The "Departments" section shows a search bar, a "Please select" dropdown, and a "Go" button. It also has a "Sort by" dropdown set to "Department ID", a "Per page" dropdown set to "5", and a "Page" dropdown set to "1" of 11. Below this is a table with columns "Department ID" and "Department name". The table contains five rows: 001 (test), 0090 (fdx mktg), 1220 (Dressing), 1234 (Plastiques), and 123456 (Testing). At the bottom right of the table, there are buttons for "Edit", "Delete", "Add", "Import/Export", and "View users". A red arrow points from the "Edit" button to the right.

Department ID	Department name
<input type="radio"/> 001	test
<input type="radio"/> 0090	fdx mktg
<input type="radio"/> 1220	Dressing
<input type="radio"/> 1234	Plastiques
<input type="radio"/> 123456	Testing

Create Departments Now (cont.)

Add new account

1. At the Welcome to Shipping Administration screen, click the *Departments* tab. Select a department from the drop-down list within the "Departments" section.
2. Click "Add new account." The Add New Account screen is displayed. Add the account number and fill in the Required fields. Click "Save."

Note: If an account is removed from the department and not assigned to other departments in the company, it will be removed from the Available Accounts list.

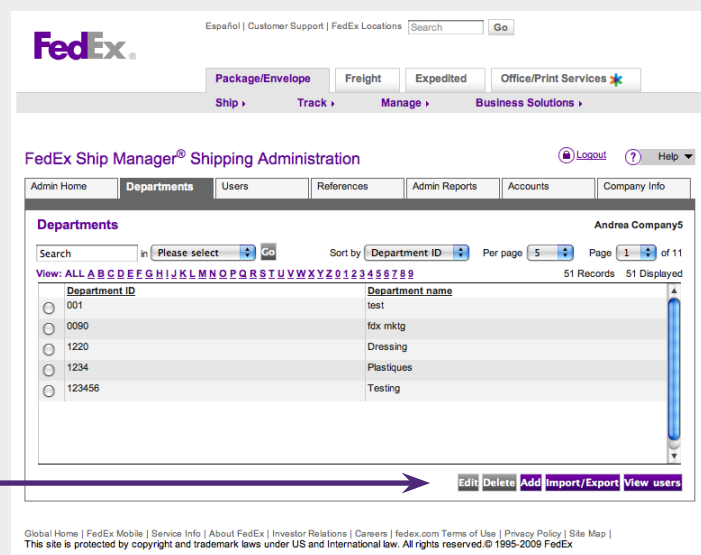
Edit an account

1. Select an account in the Available Accounts area and click "Edit account." The edit account screen will be displayed. Make your changes and click "Save."
2. Click "Continue." The Privileges screen is displayed. After completing the Privileges screen, click "Continue."
3. The References screen will be displayed. After completing the References screen, click "Continue."
4. The Defaults Screen will be displayed. Click "Save." The department information is now updated.

Delete department

Departments cannot be deleted unless all users assigned to that department have been deleted or reassigned to another department.

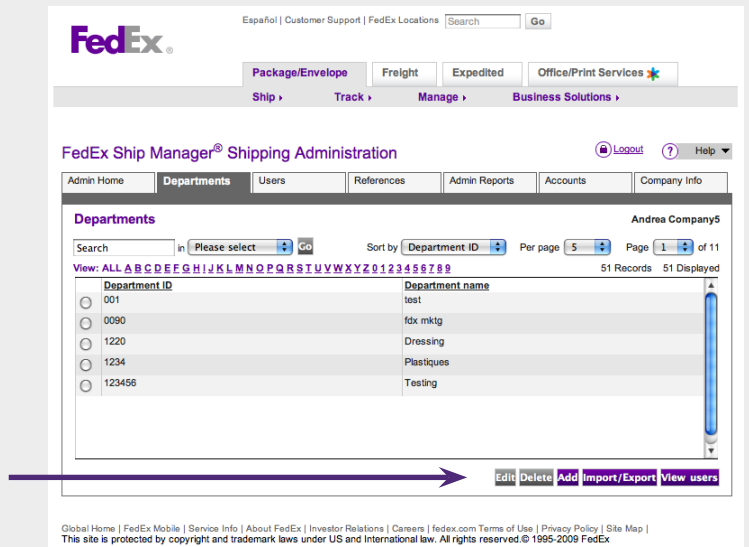
1. Select the appropriate department and click "Delete." A delete confirmation screen will be displayed.
2. Click "OK." The department is now removed from the system. You will return to the Departments screen.



Create Departments Now (cont.)

Import department or account

1. Go to the Departments screen and click "Import/Export."
2. Select Import action desired — from the drop-down menu.
3. Enter the location of your file or Click "Browse" and select the appropriate file to import (e.g., .csv).
4. Click "Import." The importing screen will be displayed, showing your import status.
5. If your import is successful, the Import Successful screen will be displayed.
6.
 - If the imported file exceeds 250 records, the Import Error screen will be displayed. Remove some of the records from the file and try to import it again.
 - If the imported file is uploaded outside of the available timeframe, import it again within the specified timeframe.
 - If your import is successful but contains errors, the screen displays those errors. Print the error screen, correct the records containing errors and import the file again. For reference, keep a copy of the error table.



Export department

1. Go to the Departments screen and click "Import/Export."
2. Select database to export the data. A confirmation screen will be displayed showing that your data has been successfully exported. Note: Exported files are in .csv format.



Administrators

How many administrators do you want to have?

- One administrator for the entire company
- One administrator over several departments
- An administrator for each department

You must establish at least one company administrator, but there is no limit to the number of secondary administrators you can establish. A single administrator for the entire company provides self-evident control and oversight benefits.

However, wise delegation of administrative responsibilities can increase efficiencies, based on the “departments” that you create within Shipping Administration. If each department is organized by a discrete function, location or account number, there may be an individual ideally suited to serve as administrator for each department or several departments. Similarly, an administrator for each department can ensure that shipping is managed in the most relevant context within your overall operation. You can designate people as administrators during the user setup process.



Establishing Users

Options for creating users:

- Create and register users yourself
- Mass create users yourself
- Invite users to register themselves
- Mass import a list to invite users to register themselves

You can create users yourself by entering their information and establishing their user ID and password. In this way, you can ensure that all relevant users are in fact registered. To expedite user creation, you can also import up to 250 users at a time by using the "Create new user" template. When creating users, you can customize the privileges that your users receive, regardless of the department in which they are created.

Alternately, you can invite users to register, and allow them to create their own user ID and password, which they are more likely to remember. In a large organization, inviting users to register themselves can save significant setup time.

Lastly, you can import a list of users who will generate the invite e-mails. Due to the sensitive nature of password information, Shipping Administration does not send e-mails to notify users when they have been created.

The two Invite options give the users the same type of privileges — they will not be increased or decreased, based on the option you choose. However, as users are set up, the administrator can choose to apply the department's overall privileges or to customize them on a case-by-case basis. You can also designate users as administrators during the user setup process.

Establishing third-party vendors as users:

Establishing vendors as departmental users provides the benefits of simplicity, transparency and cost control. Vendors ship on your behalf, with charges billed to you and no opportunity for mark-ups on shipping. Vendor shipments appear as part of your regular FedEx invoicing, and account numbers can be concealed to prevent inappropriate use of the account.

**If you are ready to create users,
click here for step-by-step instructions.**

Create Users Now

Create users now

1. Click "Create new user" on the Users screen. The Create new user screen will be displayed.
2. In the "Department" field, select a department from the drop-down list. Complete the User Details section by filling out all the required identification information for the user. The user must be assigned a department before you can proceed.
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 list.
4. Complete the User Settings section by selecting the type of privileges, references and defaults you want the user to have and by designating whether or not the user is an administrator. Click "Create user." The user information is now saved. You will return to the Users screen.

Invite users now

1. Go to the Users screen and click "Invite new user." The Invite new user screen will be displayed.
2. Complete the User Details, Accounts Available and User Settings sections.
3. Click "Invite user."

Download import template now

Before importing users, ensure that the file is properly formatted. Import templates can be downloaded and used to properly format the data. The file must be saved to a comma-separated values (csv) format prior to importing. Please refer to the Shipping Administration Import Guide for detailed instructions on proper layout and data formatting.

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

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.



Accounts

GETTING STARTED

DEPARTMENTS

ADMINISTRATORS

ESTABLISHING
USERS

ACCOUNTS

REPORTS AND
CONTACTS



Accounts

How can you access and manage accounts within Shipping Administration?

Accounts are the FedEx accounts that you own and are administering. Before you can add an Account to Shipping Administration, it must already exist.

Administrators can assign multiple accounts to a department. All Users must be assigned to an Account. Users cannot ship from multiple accounts.

Shipping Administration allows you view, search, sort, edit, delete, and add accounts.

If you need a new account, please contact your FedEx account executive, or call 1.800.GoFedEx 1.800.463.3339.

View Options for Accounts

Click the *Accounts* tab on the Shipping Administration screen to view a list of existing Accounts. From there, you can customize your view.

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.

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.

The screenshot shows the FedEx Ship Manager Shipping Administration interface. At the top, there is a navigation bar with the FedEx logo and various menu items like Package/Envelope, Freight, Expedited, and Office/Print Services. Below this is the main content area titled "FedEx Ship Manager® Shipping Administration". The "Accounts" tab is selected, and the "Account Management" section is active. A search bar is present, and the table below it lists accounts with their numbers and nicknames. The table has columns for "Account number" and "Account nickname". The data rows are:

Account number	Account nickname
00000000	JANE - DO NOT
00000000	Marketing Acct
00000000	Services - NOT GOOD
00000000	Sandpiper

At the bottom of the table, there are buttons for "View Department", "Edit", "Delete", and "Add". A red arrow points to the "Add" button.

[GETTING STARTED](#)[DEPARTMENTS](#)[ADMINISTRATORS](#)[ESTABLISHING
USERS](#)[ACCOUNTS](#)[REPORTS AND
CONTACTS](#)

Reports and Contacts

CREATING REPORTS

The administrator can create, add, edit and delete reports for any or all shipments processed using FedEx Ship Manager® at fedex.com in the most recent 45 days. These reports allow the administrator to track the status of shipments generated by Shipping Administration users and departments throughout the company.

These reports can be customized to the administrator's needs — based on date ranges, departments, sorting functions and more — and existing reports can easily be edited and saved to create new reports.

COMPANY CONTACT INFORMATION

The company-wide administrator who sets up FedEx Ship Manager at fedex.com will initially be established as the contact person for shipping issues and questions. However, this can be changed to designate any other user as the primary contact person, and that person will receive communications when other users click "Contact your administrator" on designated FedEx Ship Manager at fedex.com screens. To change the contact person, click the *Company Info* tab on the main navigation bar and enter new information in the "Company information" box.