

Shipping Administration Getting Started Guide

Managing the shipping process within your company



Welcome to Shipping Administration

What is FedEx Ship Manager™ at fedex.ca Shipping Administration?

Shipping Administration is a feature of FedEx Ship Manager at fedex.ca that gives you centralized and administrative control over the decentralized and global shipping of your company.



Is Shipping Administration right for your organization?

Do you need to:

- Control access and use of account information?
- Manage who ships and what services and features they can access?
- Make sure costs are properly allocated to the right cost centres?
- Gain visibility into your company's shipping activity on every level — locations, Departments, and accounts?
- Reduce shipping-related data entry and invoicing errors?
- Provide a shipping solution that is time and cost efficient and less error-prone?
- Create custom reports to monitor and access the shipping activity of the entire company?
- Manage the billing process through reference field configuration and cost-code validation?

If you answered yes to one or more of these questions, then Shipping Administration is your solution!

Shipping Administration provides control and flexibility

FedEx Ship Manager at fedex.ca Shipping Administration allows you to determine how you wish to organize and control shippers, known as Shipping Administration 'Users', to best fit the needs of your company.

- Utilize the Create User process so you can control their User ID, password and shipping profile.
- Utilize the Invite User process, which gives them autonomy over their User ID, password and shipping profile.
- Set up Users anywhere in the world.
- Provide an existing or new User with access to multiple account numbers.
- Set up Departments that use different account numbers or cost centres.
- Assign an account number or multiple account numbers to a Department.
- Permit or restrict access to FedExservices, customize shipping features, and set shipping defaults at the Department and User levels.
- Set up reference field control(s) on up to four references, for billing and charge-back purposes.
- Create, mandate and validate the reference information entered into the reference fields.
- Pre-determine which account number should be billed for 'transportation' and/or 'duties and taxes'.

Shipping Administration provides administration and management

- Search and sort on both the User and Department screens to help streamline administrative tasks.
- Import Departments, Users and References for fast setup or to change existing information.
- Set up a central address book with up to 25,000 recipients that can be shared company-wide.
- Assign administrative privileges to other Users to help you delegate responsibility and provide an extra layer of support.
- Assign privileges, that allow Users to:
 - Create and ship pending shipments;
 - Only create pending shipments;
 - Process other Users' pending shipments.

Shipping Administration provides visibility and monitoring

- Have visibility into the shipping activity of multiple Users in multiple locations within your company; you know who's shipping what, when, to where and how much.
- Receive notification of Users who are shipping on your company's account(s) and are not being administered.
- Access your account shipping information 24 hours a day, 7 days a week.
- Create and save customized and detailed shipping reports that allow you to monitor, manage and measure the shipping activity of all Users to better control costs.

Registering for FedEx Ship Manager™ at fedex.ca Shipping Administration

When you register your account for FedEx Ship Manager at fedex.ca Shipping Administration, you will become the Administrator of your account and will be able to administer and manage the other shippers or Users of your account(s).

Open a New Account

When opening a new FedEx account online using your credit card, your account will be automatically enabled for FedEx Ship Manager at fedex.ca Shipping Administration.

1. Go to fedex.ca and click on the **Register for fedex.ca** link.
2. Select the **Open a New FedEx Account** option.
3. Complete the form to create your new User ID and password and enter your credit card details to open a FedEx account.

The image displays three sequential screenshots of the FedEx.ca website during the registration process:

- First Screenshot:** Shows the FedEx.ca homepage with a navigation menu. A red circle and the number '1' highlight the 'Register for fedex.ca' link in the 'Quick Links' section.
- Second Screenshot:** Shows the 'Register for fedex.ca' page. A red circle and the number '2' highlight the 'Open a New FedEx Account and Start Shipping' option under the heading 'Open an account or use your existing account online'.
- Third Screenshot:** Shows the 'fedex.ca Registration' form. A red circle and the number '3' highlight the 'Open a FedEx account' radio button under the 'Confirm Your Selected Account Option' section.

Use your existing FedEx account online

To register your existing account for Shipping Administration, you will need to create a new fedex.ca User ID and password.

1. Go to fedex.ca and click on the **Register for fedex.ca** link.
2. Select the **Use Your Existing FedEx Account Online** option.
3. Complete the form to create your new User ID and password and link it to your existing FedEx account number.

The image displays three sequential screenshots of the FedEx website registration process:

- First Screenshot:** Shows the FedEx homepage with the "Register for fedex.ca" link in the "Quick Links" section highlighted with a red circle and the number 1.
- Second Screenshot:** Shows the "Register for fedex.ca" page with the "Open an account or use your existing account online" section. The "Use Your Existing FedEx Account Online" option is highlighted with a red circle and the number 2.
- Third Screenshot:** Shows the "fedex.ca Registration" form. The "Open a FedEx account" option is highlighted with a red circle and the number 3.

Registering for Shipping Administration

1. Regardless of whether you opened a new account or linked a new User ID to your existing account, on the confirmation page you'll see a link to 'Ship Now'.
2. When you click this link, you will be presented with a screen to enable FedEx Ship Manager at fedex.ca.
3. Next, a confirmation screen will display with a link to an additional option to register for the Shipping Administration feature. Click **Register** and complete the additional steps for validation and registration

IMPORTANT: Do not click on the 'Start Using FedEx Ship Manager' link, as this will stop the Shipping Administration registration process.

4. A confirmation page will appear, confirming that you've successfully registered as a Shipping Administration Administrator. You can click on the link **Start managing shippers online** to get started, or log in to FedEx Ship Manager at fedex.ca at a later time to begin.

The diagram illustrates the registration process through four sequential screenshots:

- 1. fedex.ca Registration Confirmation:** Shows a confirmation message: "Congratulations TRISHA, your registration is complete." Below this, account information is displayed: User ID: LK9CAL9K, Account number: 325511007. A "Ship now?" link is circled in red.
- 2. fedex.com Login Registration:** Shows the registration form with fields for "Your FedEx account" and "Select a FedEx account from your online profile". A "Start Using FedEx Ship Manager" button is circled in red.
- 3. Confirmation:** Shows a confirmation message: "Your Registration is Complete! Thank you for registering an account with FedEx Ship Manager on fedex.com." A "register" link is circled in red.
- 4. Confirmation:** Shows a confirmation message: "Your Registration is Complete! Thank you for registering for Shipping Administration on fedex.com." A "Start Managing shippers online" button is circled in red.

After registering for FedEx Ship Manager™ at fedex.ca Shipping Administration

After you register for FedEx Ship Manager at fedex.ca Shipping Administration, you will need to complete some or all of the following tasks to take full advantage of the features offered by this powerful account management tool.

- Add Departments. Departments can be set up as separate geographical locations or as functional groups within the organization that use different account numbers or cost centres.
- Assign account numbers to Departments by selecting existing account numbers from the available accounts list or by adding a new account number.
- Set service and reference options for each Department.
- Add Users to Departments and assign account numbers to Users.
- Assign Company or Department administrative privileges to other Users (optional).

The following sections of this guide provide detailed information in each of these functions within FedEx Ship Manager at fedex.ca Shipping Administration.

Getting Started with Shipping Administration

To get started using Shipping Administration, determine how to organize and control Users in a way that best fits the needs of your company and complete the following steps or tasks.

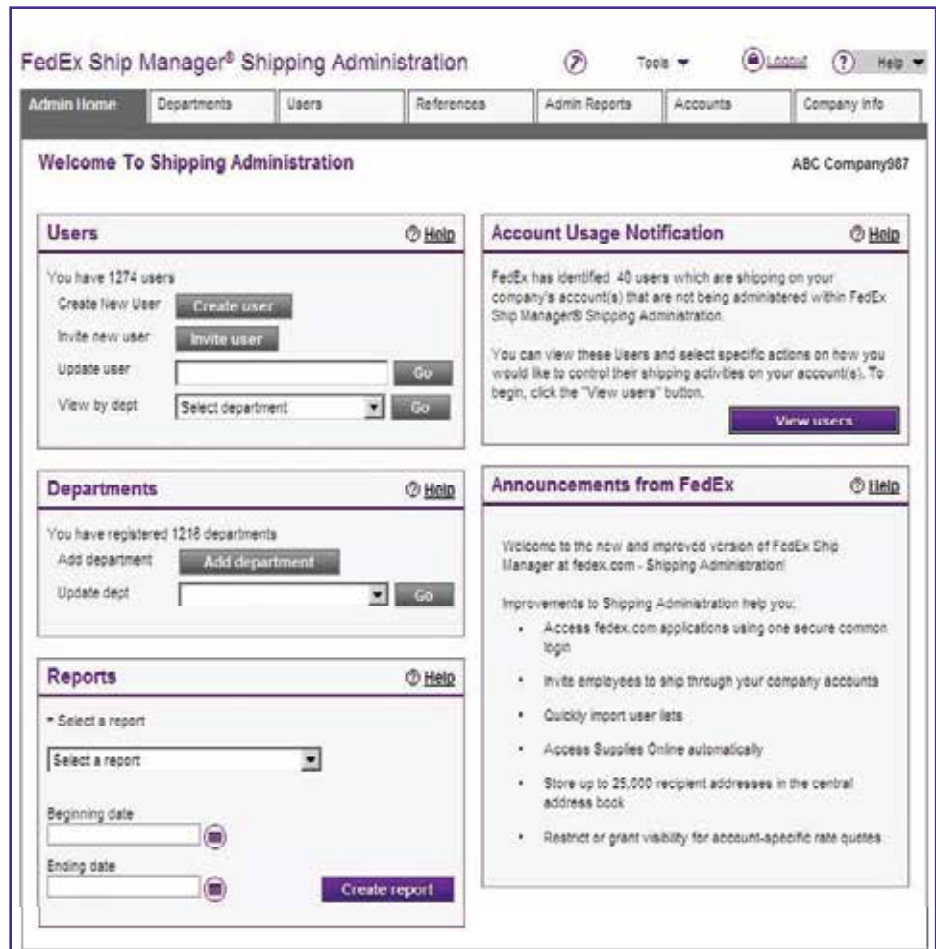
Departments and Users

Shipping Administration allows you to organize and manage the shippers in your company at the Department and User levels. Set up Departments in your company, then create or invite Users who are assigned to a Department. Preferences and privileges can be set at the Department and/or User level.

Add a Department

Adding Departments is a four-screen process that includes:

1. **Profile screen:** Complete the details that identify the Department and assign account numbers.
2. **Privileges screen:** Define User privileges and set service choices.
3. **References screen:** Configure information for references Users will see on the FedEx Ship Manager™ at fedex.ca screens.
4. **Default screen:** Set up feature and shipping defaults.



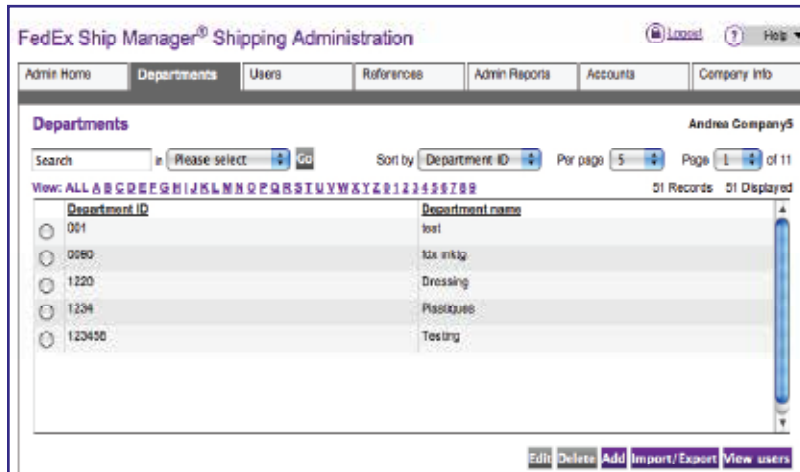
Managing Departments

View Departments

When you click on the Departments tab, the Departments screen displays.

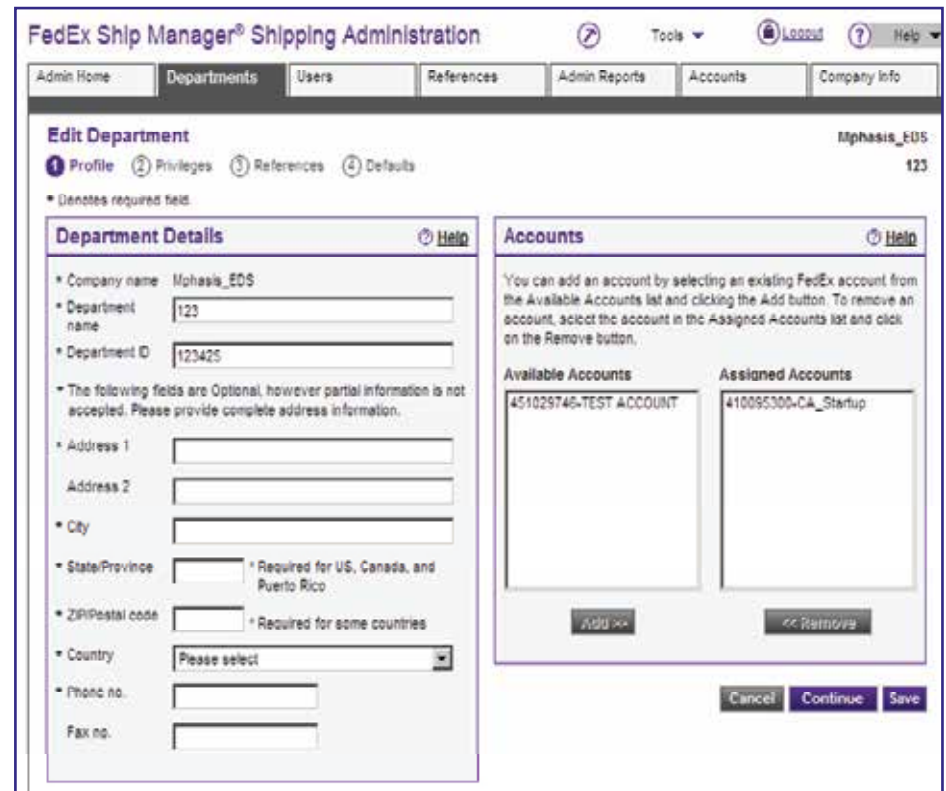
The Departments screen contains key information about Departments, such as Department name and Department ID.

You can search, sort, view, add, update, delete, import and export multiple Departments and view Users associated with the Department.



Department Profile

Enter and update a Department's information and assign one or more account numbers to the Department, or remove account numbers as necessary.



Managing Departments (continued)

Department Privileges

Allow or restrict User rights and privileges, including:

- Choosing which address book(s) Users can access;
- Allowing Users to create up to 20 sender profiles;
- Allowing Users to process return shipments (intra-U.S. only);
- Allowing Users to view rates and transit times;
- Allowing Users to set up a thermal printer;
- Allowing Users to add additional handling charges;
- Allowing Users to view and update default shipping information;
- Allowing Users to view and update default references.

The screenshot displays the 'Privileges' configuration page for a user profile. The interface is organized into several sections, each with a 'Help' link:

- Address Book:** Includes checkboxes for 'Personal address book', 'Shared address book', 'Central address book', and 'Sender profile / Add new senders'.
- General:** Includes options for 'Process return shipments', 'Require RMA number', 'Allow user to schedule pickup', 'Enable Electronic Trade Documents (ETD)', 'Create pending shipments' (with sub-options for 'Can only create pending shipments' and 'Process other users pending shipments'), and 'Process other users pending shipments'.
- Rates & Transit Times:** Includes radio buttons for 'Display this section' (with sub-options 'Do not display rates (Display transit times only)', 'Always display all services', and 'Always show section expanded') and a 'Do not display this section' option.
- Additional Preferences:** Includes a note '(Users can change these settings)' and checkboxes for 'Set up thermal printer', 'Set up additional handling charges', 'View/Update default shipping information', 'View/Update default references', and 'Display pending shipments confirmation'.
- Domestic Services:** Includes a 'Select all' checkbox and checkboxes for various services like 'FedEx First Overnight', 'FedEx Priority Overnight', 'FedEx Standard Overnight', 'FedEx 2Day', 'FedEx Economy', 'FedEx Express Saver', 'Apply to return shipments', 'FedEx Ground', 'FedEx Home Delivery', 'FedEx 1Day Freight', 'FedEx 2Day Freight', and 'FedEx 3Day Freight'.
- International Services:** Includes a 'Select all' checkbox and checkboxes for 'FedEx Intl. First', 'FedEx Intl. Priority', 'FedEx Europe First Intl. Priority (Intra Europe only)', 'FedEx Intl. Economy', 'FedEx Intl. Ground', 'FedEx Intl. Priority Freight', and 'FedEx Intl. Economy Freight'.
- Special Services:** Includes a 'Select all' checkbox, 'Apply to return shipments', and checkboxes for 'Dangerous goods', 'Hazardous materials', 'COD', 'Inside pickup/delivery (Freight services only)', 'Saturday services (pickup/delivery)', 'Saturday delivery for freight', 'Require Broker Select', and 'Display only brokers defined by Administrator'.

At the bottom right, there are buttons for 'Cancel', 'Previous', 'Continue', and 'Save'.

Managing Departments (continued)

Department Defaults

Set service settings to most frequently used settings to facilitate faster shipment processing.

- Set defaults for options to ensure a consistent User experience across the Department(s).
- Default settings entered here correspond with options available on the User's Preferences screen.

FedEx Ship Manager® Shipping Administration

Admin Home | Departments | Users | References | Admin Reports | Accounts | Company info

Edit Department ABC Company387
2222

1 Profile 2 Privileges 3 References 4 Defaults

* Denotes required field.

Default Shipping information Help

Service type: Select FedEx service

Package type: Your Packaging

Unit of measure: Please select

Currency: Please select

Bill transportation to: Sender (prepaid)

Account no.:

Bill duties/taxes/fees to: Sender (prepaid)

Account no.:

FedEx Express shipments only

Pickup/Dropoff Help

Will use scheduled pickup at my location

Will drop off at FedEx location

Customize Options Help

Always remind user to print pending shipments

Always show shipment confirmation window

Display contact ID field

Cancel Previous Save

Managing Users

Adding Users

There are two ways to add Users, depending on the amount of control or flexibility you need.

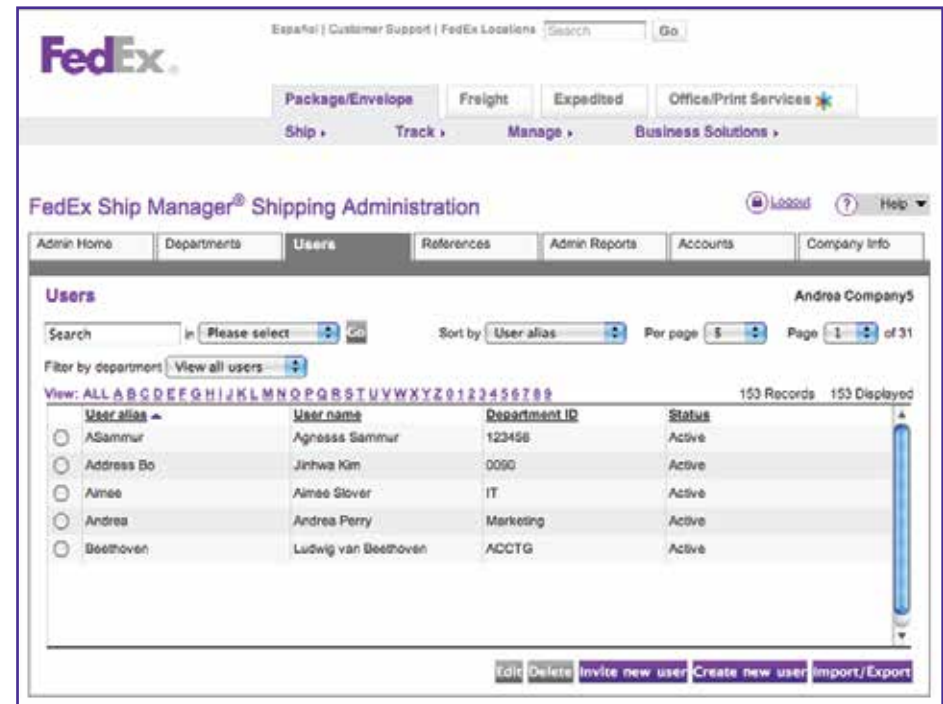
1. If you want to create and manage a User's ID, password and shipping profile, use the 'Create New User' functionality.
2. If you prefer that the User have autonomy over these factors, use the 'Invite New User' functionality.

Assign the User to a Department by selecting one from the drop-down menu.

View Users

When you click on the Users tab, the Users screen displays. This screen contains key information about Users, such as User alias, User name, Department ID and User status.

From this screen, you can search, sort, view, edit, delete, invite or create and import/export Users.



Managing Users (continued)

Account Usage Notification Tool

This screen gives Administrators visibility into who is able to ship using their account and provides the ability to manage or remove a User's access to ship on selected account numbers.



User Profile

Use this screen to enter and update User information, assign an account number(s), assign User settings, and assign the User's role.

Once the Department is selected, the available accounts will be displayed and can be assigned to a User.



Managing Users (continued)

Multi-Account Support for Users

If the User has been assigned to more than one account number, they will see the account nicknames in the drop-down menu within the 'Billing Details' section of the shipping screen.

Users can change the Account to be billed for both the 'Bill transportation to' and the 'Bill duties/taxes/fees to' options.

The default for both these options can be set in the Users 'Preferences' as well as when they are adding recipients into their 'Address Book'.

Note: Multi-Account support is not available to 'invited' Users.

User Privileges

Instead of allowing the same default Department settings to apply to a particular User, you can assign unique privileges when adding the User to the Department, including:

- Allowing or restricting specific rights and privileges to the User;
- Allowing or restricting shipping service choices to the User;
- Allowing or restricting special service choices to the User.

User Defaults

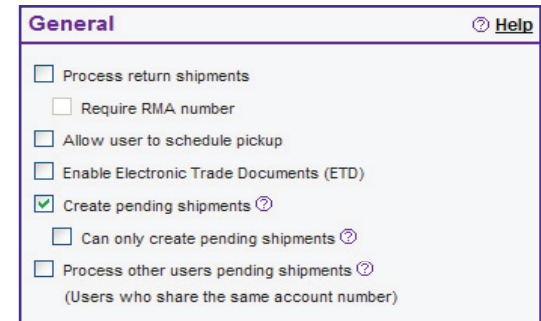
Customize defaults at the User level. These default settings correspond with options available on the User's Preferences screen.

Mailroom Processing

Mailroom processing allows a User to begin processing a shipment that can later be completed by another User. Administrators can assign the following privileges for creating pending shipments on the 'Privileges' screen:

- **Create pending shipments**

This option allows a User to save a shipment that can be processed later that day or on a future date. By default, this functionality is enabled. Users will be able to print a 'Pending Confirmation Receipt' that can be used to find the shipment for future use or provided with the package for completion by another User.



- **Only create pending shipments**

This option allows a User to only save a shipment in pending status and not the final processing and printing of a shipping label.

- **Process other Users pending shipments**

This option allow a User to finalize other Users' pending shipments and print the shipping label. This is not available if a User can only create pending shipments.

Managing Accounts

Add a New Account

You can add established accounts to be controlled in Shipping Administration.

- Click **Add** to display the Add New Account screen.
- Enter the account information.
- The address information entered here must match the physical address that was provided to FedEx for this account.
- Save or cancel changes as needed.

Add New Account
* Denotes required field.

Account Details ? Help

* Account no.

* Account nickname

* Contact name

* Address 1

Address 2

* City

* State

* ZIP

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.

View Departments Assigned to an Account

- You can select an Account and View Departments assigned to it.
- The Accounts screen will display, showing all Departments assigned to that Account.

Company profile

Use this screen to:

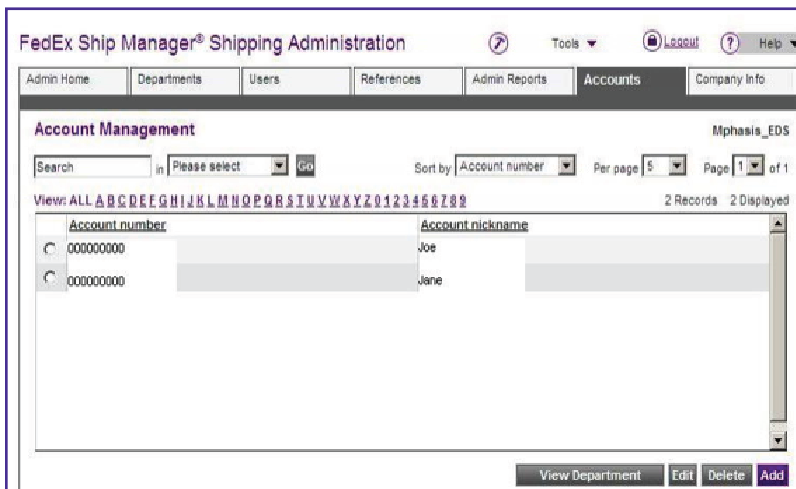
- View or update company information.
- Update the admin e-mail address used for the 'Contact your Administrator' link on the Shipping Administration User log-in page.

Managing Accounts (continued)

View and Sort Accounts

When you click on the Accounts tab, the Accounts screen displays.

- Enter search criteria to locate particular account information.
- View all accounts or select specialized ‘View Options’ from a numbered list.
- Sort account numbers by choosing a column from the ‘Sort By’ menu and clicking a column header.



Edit Accounts

- Edit existing Account nickname
- Select the account number from the ‘Account Management page’.
- Click on **Edit**
- Save or cancel changes as needed.
- Select the account number from the ‘Account Management’ page.
- Click on delete.

References

A reference is an optional number or a description that appears on your FedEx invoice and on your Shipping Administration administrative reports.

Add a Reference

Adding a Reference is a three-step process:

1. Add the appropriate information in the Reference ID and Reference Description fields.
2. Select one or more of the Reference field options; you must select at least one.
3. Click on **Save/Update**.
4. The Reference information is added and you are returned to the References screen. If you want to save the entry and add more, click on **Save/Add another reference**.

Department References

- Set up reference validation for the reference fields.
- Create reference lists.
- Specify or create reference default information.
- Select reference settings for return shipments. (intra-U.S. shipments only).

Validation options include:

- Not required (text field);
- Not required (view list);
- Required (text field);
- Required (view list);
- Required with validation (text field);
- Required with validation (view list);
- Default and cannot change.

Reference name	Validation	List display	Reference default	Apply to return shipments
Your reference	Required with validation (v)	All references	12345678 or Select	<input type="checkbox"/>
Department	Required with validation (v)	All references	ABCDEFGH or Select	<input type="checkbox"/>
PO no.	Required (view list)	All references	REF7 or Select	<input type="checkbox"/>
Invoice no.	Default and cannot change	All references	REF7 or Select	<input type="checkbox"/>

Buttons: Cancel, Previous, Continue

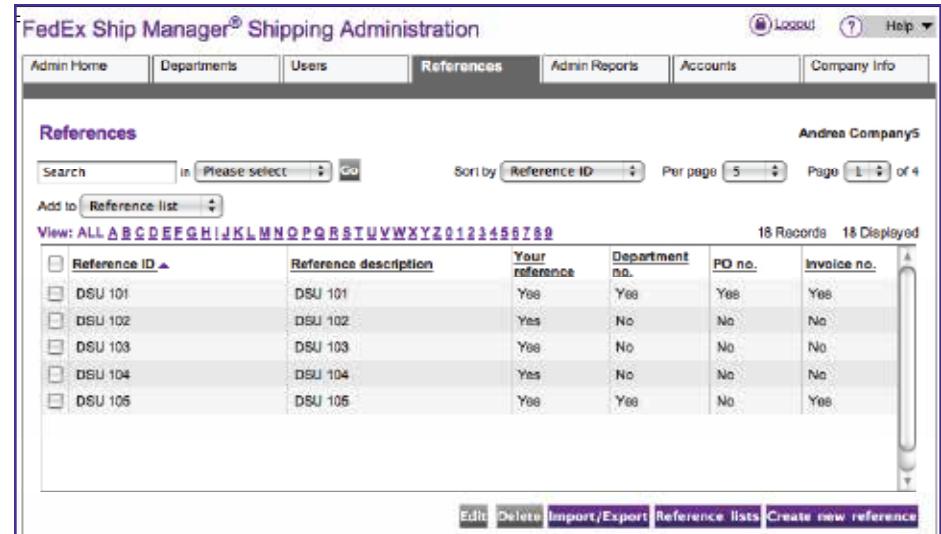
User References

Customize references at the User level. The same validation criteria apply as per Department references.

View References

When you click on the References tab, the References screen displays. This screen contains key information about References, such as Reference ID and Reference description.

You can view, search, sort, add, update, delete, import and export References here, as well as view, update and add to current Reference lists, and create new ones.

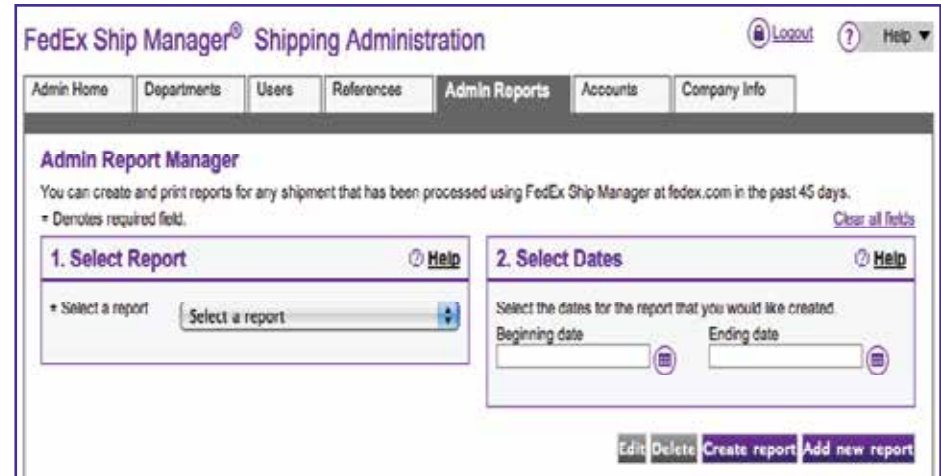


Admin Reports

Admin Reports allows a company centralized visibility of the shipping activity of Users across the company. Customized Administrator Reports can display valuable information, such as service information, reference values and estimated shipping charges.

- Up to 25 administrative report configurations can be saved.
- Reports can be generated from the Accounts screen or by using the 'Reports' box on the Admin Home page.
- Create, add, edit and delete reports for any shipment processed using FedEx Ship Manager™ at fedex.ca in the past 45 days.

To create a report from a list of existing saved reports, select a report from the 'Select report' drop-down menu, select beginning and ending dates from the drop-down menus provided, and click on the **Create report** button.



Add Report

Add new customized reports for an individual Department or for the entire company.

- Select up to 23 enhanced detail fields to appear on the report.
- Select up to three options for sorting the report total and subtotal.
- Set the date range for the report.

Report Results

The report results include all sender and recipient information, as well as all reference information and can be used for monitoring Departmental shipments.

You can view and print the entire report, or download the entire report by saving it to a location of your choosing on your hard drive in comma-separated variable (CSV) format.

The screenshot shows the 'Add Report' page in the FedEx Ship Manager Shipping Administration. The page has a navigation bar at the top with links for Admin Home, Departments, Users, References, Admin Reports, Accounts, and Company Info. The main content area is titled 'Add Report' and includes a sub-header: '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.' There is a 'Clear All Fields' link in the top right.

The form is organized into several sections:

- 1. Select Department:** A dropdown menu labeled 'Select department:' is currently set to 'All departments'.
- 2. Select Dates:** Two input fields labeled 'Beginning date' and 'Ending date' are provided for selecting the report date range.
- 3. Select Fields:** A list of 23 fields with checkboxes for selection:
 - Select all
 - Sender User alias
 - Department ID
 - Sender information
 - Ship date
 - Tracking no.
 - Service type
 - Payment type
 - Bill transportation to
 - Bill duties/taxes/fees to
 - Recipient information
 - Weight
 - Your reference
 - P.O. no.
 - Invoice no.
 - Department no.
 - Processed by
 - Processed by User alias
 - Company
 - Package type
 - Purpose
 - Signature options
 - B13A Canada Export Declaration
 - Export permit no.
- Select Sort Fields (optional):** Three dropdown menus labeled 'Sort 1', 'Sort 2', and 'Sort 3', each with a 'Select' option.
- Select Report Name (optional):** A checkbox labeled 'Save report:' and an input field for the report name.

At the bottom right, there are two buttons: 'Cancel' and 'Create report'.

Support

For more details on the Shipping Administration functionality:

- Use the Quick Help tool located within Shipping Administration
- For technical assistance, call 1.877.339.2774