FedEx

FedEx® Billing Online

User Guide

FedEx | Latin America & Caribbean

Contents

PART 1

Introduction to modernized FedEx® Billing Online

FedEx® Billing Online simplifies and streamlines your accounts payable process. From ensuring accurate cash flow to managing payments and reporting effectively, we have the right billing option and solution that best fits your needs. FBO is an easy-to-use online tool that helps you manage your invoice-related tasks by eliminating excess paperwork and improving productivity, and it's about to get even better with the new modernized invoicing tool. With flexible ways to view, filter, and use data, you can create your ideal invoicing experience.

This is just a preview experience, and innovating the invoice tool is just the beginning. Advancements are made in the payment tool, managing payments are now made simpler, with AutoPay capabilities and utilizing credit amounts. We're also working to improve administration tools. We'll keep you posted as we get close to those release dates.

Features and benefits

Account Summary

Provides balance due, and past due amounts information for the account.

Invoice table

Provides the list of invoice numbers along with its account numbers and invoice details information in a tabulated format.

Invoice filters & Quick Search

Filter and quick search help you to filter and locate the exact invoice number.

Customized Views and columns

Ability to customize the columns and change the views of the invoice table and save the customized views for future.

Payment flow

Flawless flow of payment from adding to cart and reviewing the cart items to checkout process.

Managing payments

Helps in managing payment profiles, set up autopay and view your scheduled payments and credits.

PART 3

Let's get started

Watch for a banner within the existing FedEx® Billing Online application. Click the banner to try the new experience. You will still be able to access the existing application from the new tool.

STEP 1

Go to FedEx home page

Login to the **fedex.com** home page.

STEP 2

Select View and Pay Bills Online

In the FedEx home page, click **Account** and select **View and Pay Bills**.

STEP 3

Login to FedEx® Billing Online

Click **ACCESS NOW** to register or login to your FedEx Billing Online account.
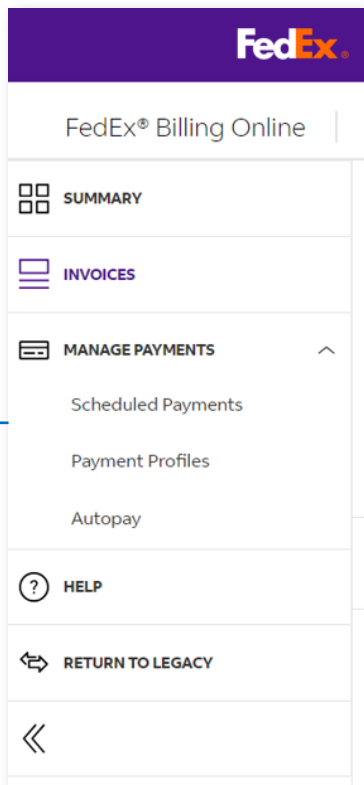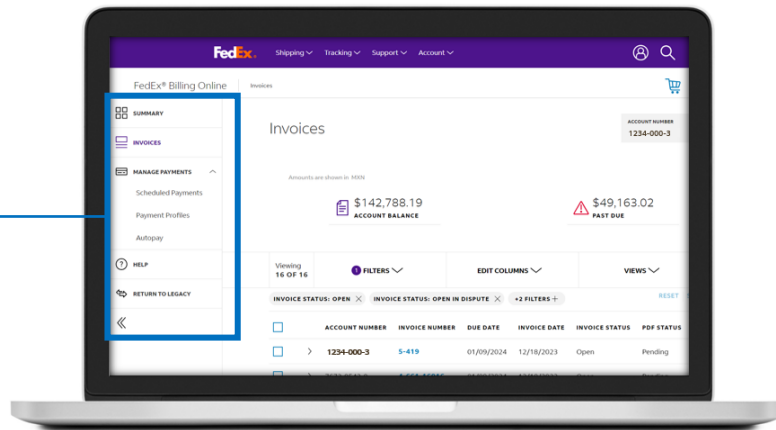
STEP 4

Try the new experience

Click **TRY THE NEW EXPERIENCE** in the banner that will take you to the new FedEx® Billing Online tool.

PART 4

The menu explained

SUMMARY

Here you will get the account number information and the account summary tiles of your balance due and past due amount information. Selecting any of these summary tiles will take you to the Invoice page.

INVOICES

All the invoices linked to your account number are displayed here in a tabulated format, with the options to further drill down into details. The invoice table is fully customizable which allows you to make decisions of your choice.

MANAGE PAYMENTS

Information related to your payments and payment accounts are listed in this section under four categories Scheduled Payments, Payment Profiles, Autopay and Available Credits.

HELP

For extra guidance on the tool and new features.

RETURN TO LEGACY

This will take you to the current FedEx Billing Online application.

PART 5

Summary

After being directed to the new FedEx Billing Online experience, you will land on the Summary page. In the Summary page, you can view the account number information, balance due amount and the past due amounts for the selected account number in your currency.
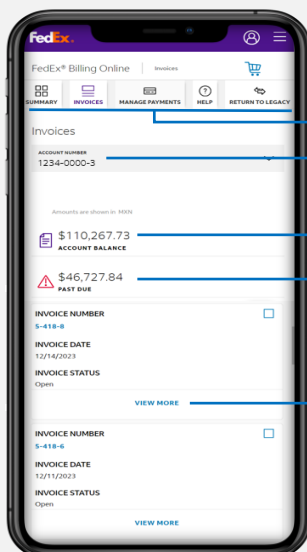
DESKTOP VIEW
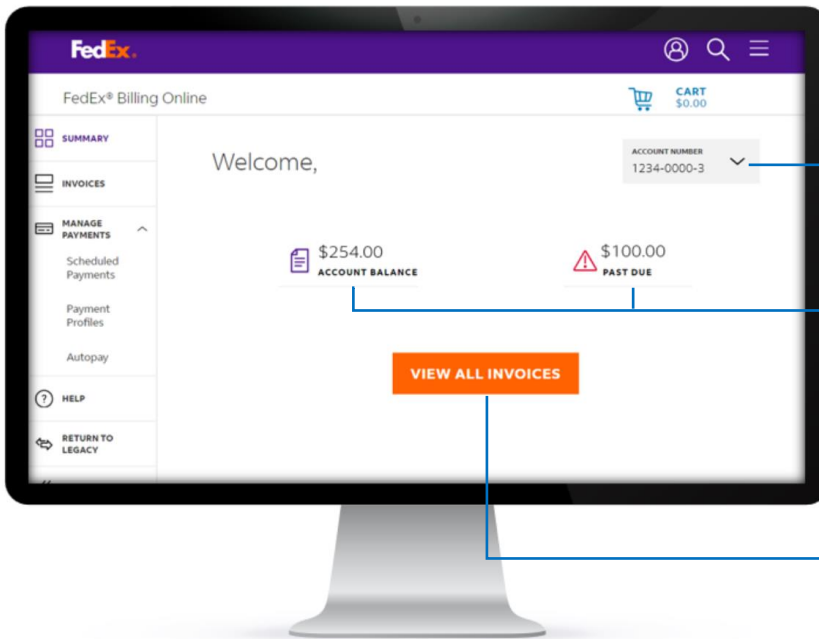
ACCOUNT NUMBER: drop-down provides you the list of all the account numbers you have access for.

ACCOUNT BALANCE and **PAST DUE:** are two account summary tiles. Selecting any of these account summary tiles, will take you to the invoice table filtered with invoices related to the chosen summary tile.

Click **VIEW ALL INVOICES** to go to your Invoices page.

MOBILE VIEW

Access to **navigation menu**:

ACCOUNT NUMBER: drop-down provides you the list of all the account numbers you have access for.

ACCOUNT BALANCE and **PAST DUE:** are two account summary tiles. Selecting any of these account summary tiles, will take you to the invoice table filtered with invoices related to the chosen summary tile.

Click **VIEW MORE** to review invoice summary.

PART 6

Invoices

Invoice Table

In the left navigation menu, click Invoices, to view the list of all the invoices for the selected account number in a tabulated format.

In the invoices table, you have options to filter your invoice data, edit the columns of invoice table, save your customized view, select default views, or search for any specific invoices.
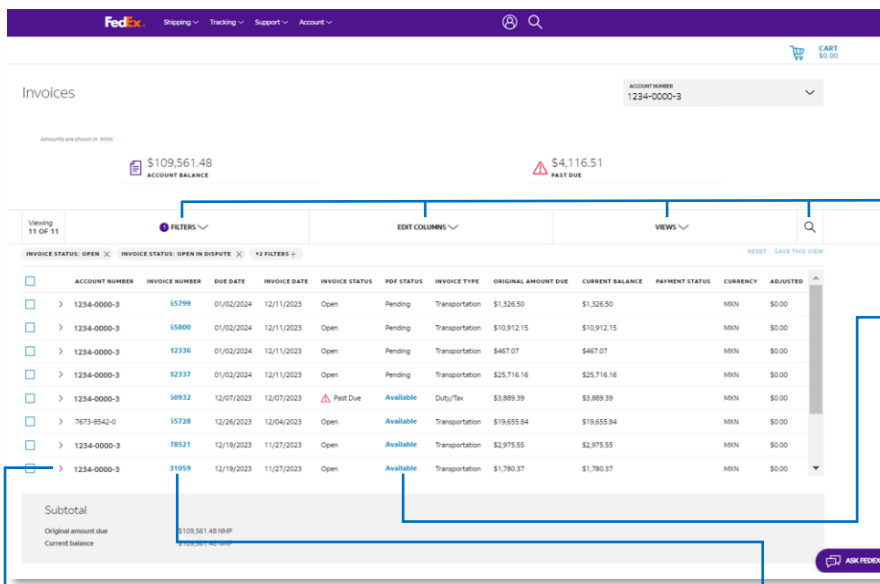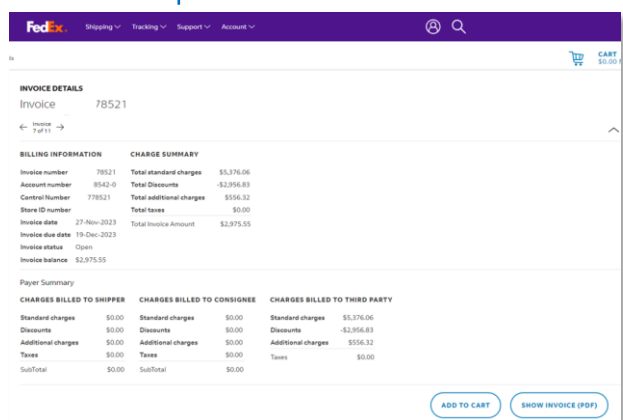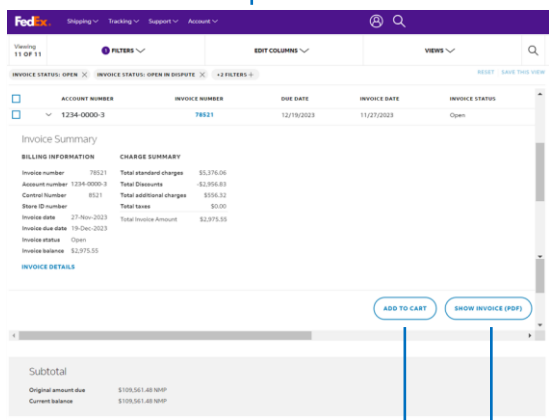

This tab allows you to do **FILTERS**, **EDIT COLUMNS**. customize your invoice table **VIEWS** and **SEARCH** your invoices.

Click **Available** to download the PDF version of your invoice.

Click drop down **>** to expand and view **invoice Summary**.

Click on **invoice number** to get **INVOICE DETAILS**.

You can **ADD TO CART** to pay your invoice and **SHOW INVOICE (PDF)**.

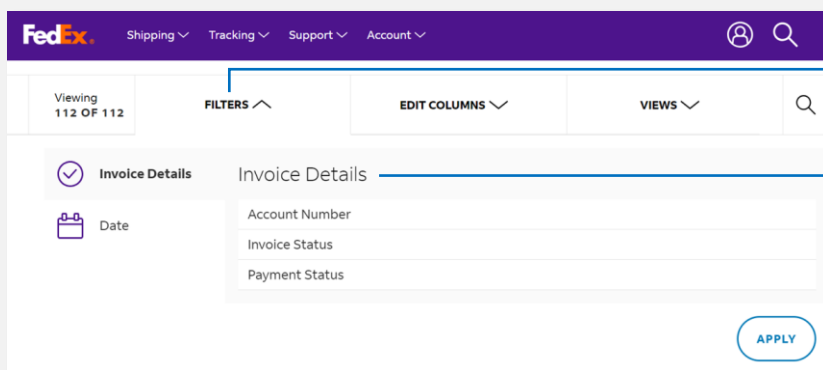You can **ADD TO CART** to pay your invoice and **SHOW INVOICE (PDF)**.

Invoice search and filters

To search any invoice, click the **search icon**, and enter your invoice number, date, or status of the invoice in the search text box. The invoice table displays the results for the search keyword.
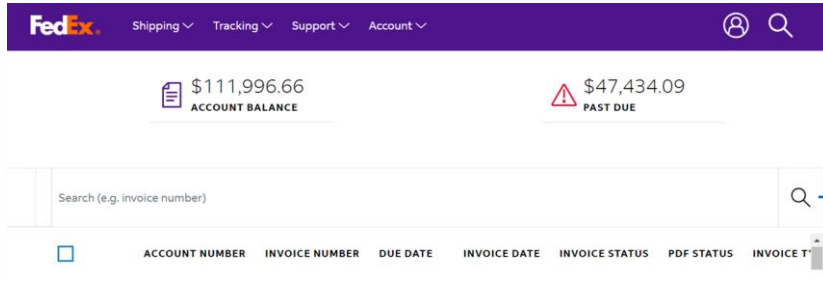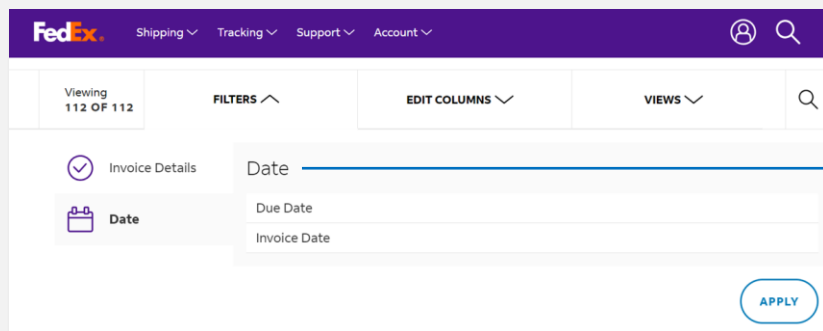

Click **search icon**.

You can customize your invoice table, by clicking **FILTERS**.

You can filter your **Invoice Details** by:
• **Account Number**
• **Invoice Status**
• **Payment Status**

Then click **APPLY**.

You can filter your **Date** by:
• **Due Date**
• **Invoice Date**

Then click **APPLY**.

Below is the list of filters available to customize the invoice table:

| Filter Elements	Description
Invoice Details	
Account number	Select the account number you wish to see in your invoice table.
Invoice status	Select the invoice status as Open, Open - Past Due, Past Due – or Closed.
Payment status	Select the payment status as Scheduled, Submitted, Paid, Pending, Declined or Cancelled.
Date	
Due date	Create or select the date range from the list of options available.
Invoice date	Create or select the date range from the list of options available.

Edit Columns and Views

Using the **EDIT COLUMNS** feature, you can edit the columns available in the invoice table.
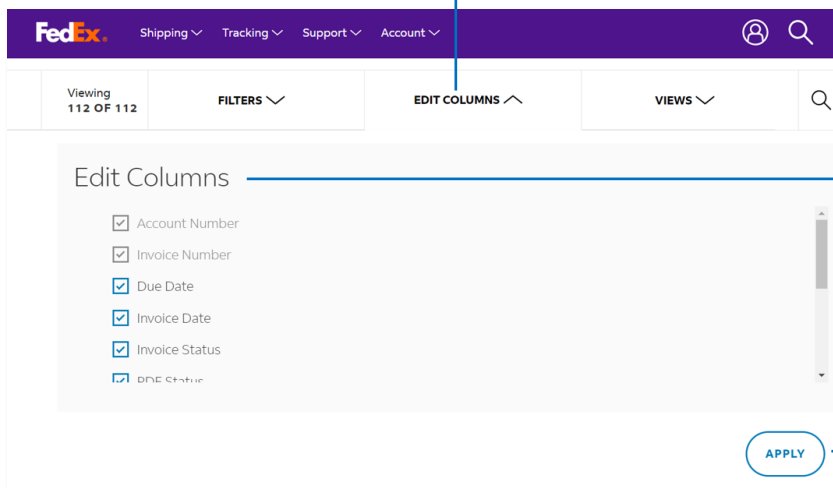
Select/unselect the options you wish to include in your invoice table,.
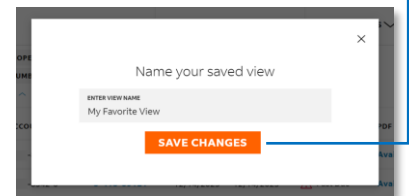
Then click **APPLY**.

After you have applied filters and edited columns, you can save your **VIEWS**.
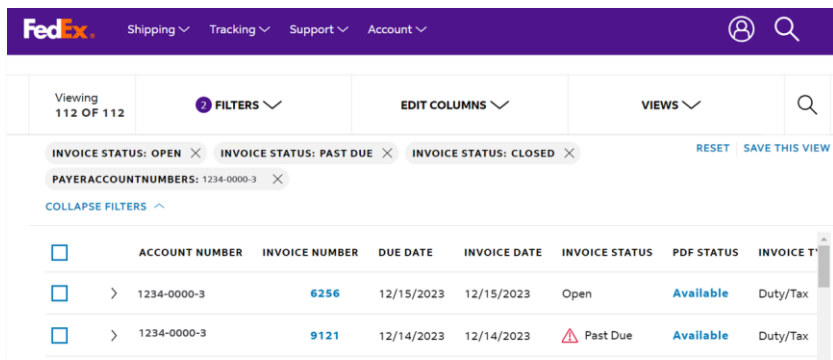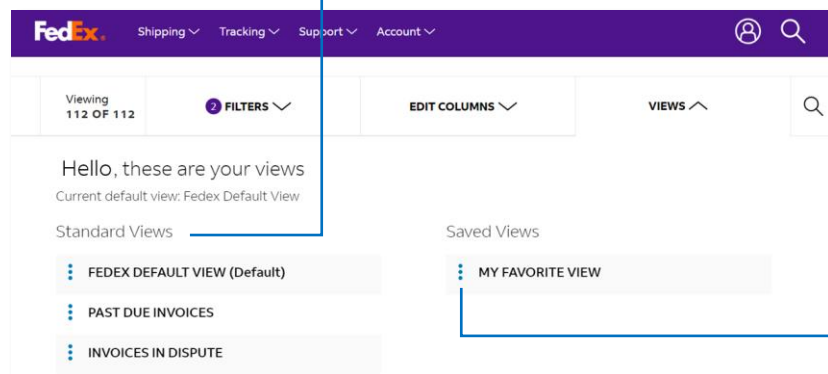
Click **SAVE THIS VIEW.**.

On prompt screen **ENTER VIEW NAME,** then click **SAVE CHANGES**.

There are three **Standard Views** for your account summary tiles available in the Summary page.

Click on dots to **Set as default**, **Rename** or **Remove** your saved views.

Invoice Details

In the Invoice details page, there are five parameters: Invoice details, Shipments, Payments and charges, Historical references, and Messages.

INVOICE DETAILS provides information about the Invoice number, Account number, ID numbers, Invoice date, Invoice due date, Invoice status, Invoice balance, Customer information, and other charges.

Shipments table provides detail about the Tracking ID, Date, Type of service, Product group, Reference number, Type of view, Invoice status, Meter value, Total billed and Balance due.

Click **Tracking Number** to get more information about the Shipment details.

Payment and Charges table provides detail about Transaction history, Merchandise sale details, Miscellaneous charges, and Other miscellaneous charges of the invoice.

Historical References provides detail on any changes made in the account information.

Messages includes information and messages specific to your invoice.

Shipment Details

In the Shipment details page, there are four parameters: Shipments, Payments and charges, Historical references, and Messages.
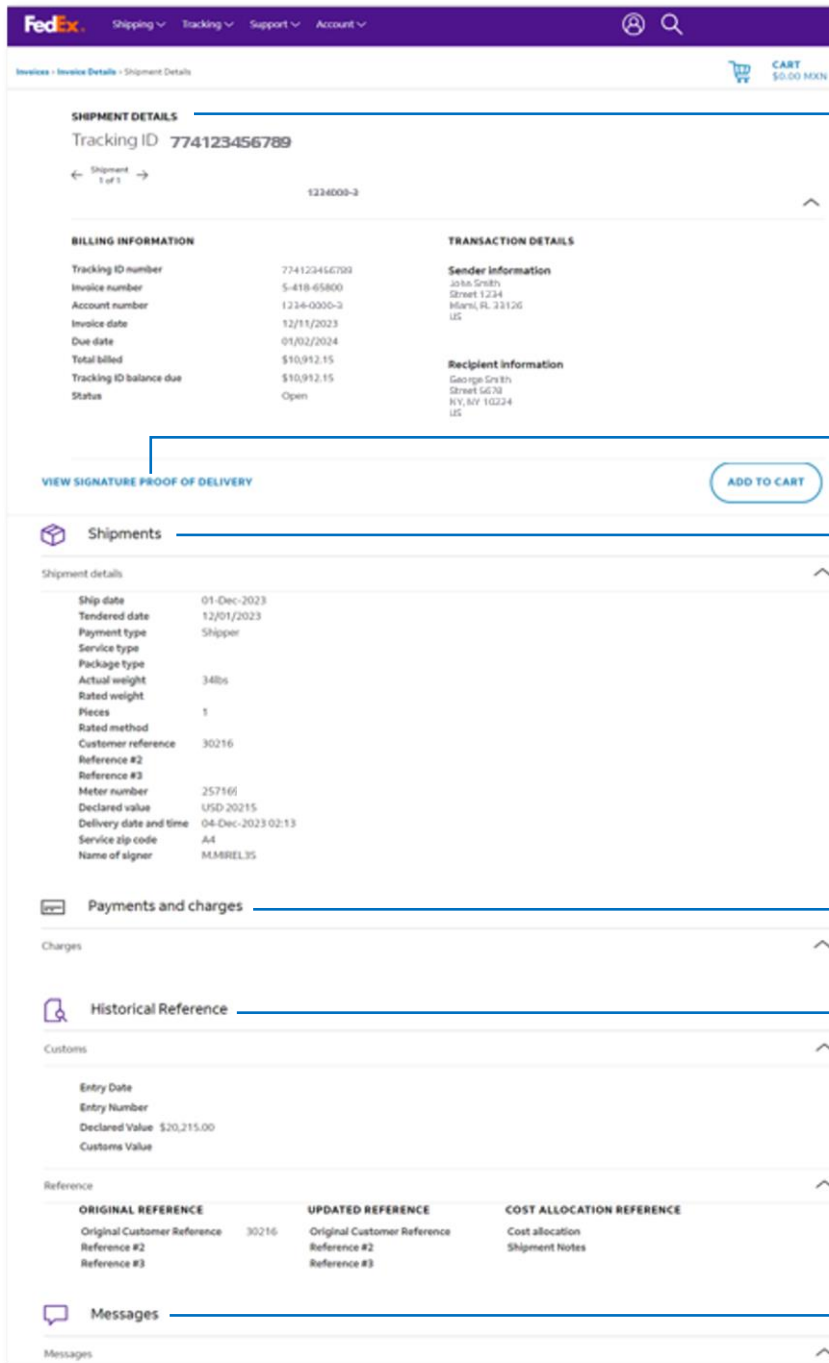
SHIPMENT DETAILS provide details about Billing Information, Transaction Details, and Recipient Information.

Click to **VIEW SIGNATURE PROOF OF DELIVERY**.

Shipments provide details about the Ship date, Tendered date, Payment type, Service type, Zone, Package type, Actual weight, Rated weight, Pieces, Rated method, Meter number, Declared value, Delivery date and time, Service zip code and Name of signer.

Payment and charges provide details about Transportation Charge, Discounts, Hold for Pickup, and Fuel Surcharge.

Historical references provides details about customs and references.

Messages includes information and messages related to your shipments.

PART 7

Payments

Pay Cart

Pay cart allows you to add invoices or shipments of the invoice to your cart and make payments for the selected cart items or schedule the payments for future date. Cart items can only be selected for a pay cart at the invoice or shipment level.
.
Invoices or shipments can be added to pay cart in multiple options:

INVOICE TABLE

To pay invoice (Option 1):

Step 1: In the summary invoice table page, select the invoices for which you wish to make payment, by clicking **checkbox** of the respective invoice number.

Step 2: Once it is selected, **ADD TO CART** option will be enabled, then Click **ADD TO CART**.

INVOICE DETAIL

To pay invoice (Option 2):

In the invoice details page, click **ADD TO CART** to pay invoice.

To pay shipment (Option 1):

Step 1. In the invoice details page, select the shipments for which you wish to make payment, by clicking **checkbox** of the respective tracking numbers.

Step 2. Once it is selected, **ADD TO CART** option will be enabled, then Click **ADD TO CART**.

Pay Cart

SHIPMENT DETAILS

To pay shipment (Option 2):

In the shipment details page, click **ADD TO CART** to pay shipment.

Please note: Pay cart functionality is not available for users with view-only access. Only the invoices with invoice status as Past due and Open can be added to pay cart. Disputed invoices cannot be added to pay cart until the dispute is resolved and closed invoices cannot be added to pay cart as the payment is already completed for those invoices.

Review pay cart items: After adding invoices and/or shipments to the pay cart, to review the cart items, click the shopping icon or cart on the top right corner.

To proceed with the payment option, click **CHECKOUT**. Then, you will get the Checkout page.

To remove all the items in the pay cart, click **EMPTY CART**. Then, the below window will be displayed.

Checkout Process

In the **Checkout** page, choose the payment method. Then click NEXT.

Payment Profile

If you have any saved payment profiles in your account, you can choose them from the **Payment profile** drop-down.

Please note: Payment profiles can be saved only by an admin user, though a standard user cannot save a payment profile, admin user can pitch in and save the profile for standard users.

Click **NEXT** The Payment Summary page is displayed

Click **EDIT CART** to add and/or remove invoices and/or shipments.

New Credit Card

If you don't have any saved payment profiles or want to add any **New Credit Card** account, choose the relevant select icon and fill in all the relevant details.

Accept the **FedEx terms and conditions**.

Click **SAVE AS NEW PAYMENT PROFILE** for future payments.

Please note: A maximum of ten (10) credit card information can be saved as a payment profiles. Saving a payment profile functionality is available only for admin users.

In the **Payment Summary** page, you can review payment details, cart items and total cart value.

click **PAY** to complete your payment.

User guide > payments > **Manage Payments**

Manage Payments

Manage payment section provides details related to your payment information under three different subsections: Scheduled payments, Payment profiles and AutoPay.

Scheduled payments

Scheduled payments tab has a table which provides following information: Scheduled date, Payment profile, Payment type, Reference ID, Cart total, and Currency.

Click the **three dots** to make any changes to your scheduled payments.

Payment Profiles

Payment profiles tab provides the list of all your saved payment profiles. In this tab, standard users can only view their saved payment profiles, whereas the admin users can view, edit, or create a payment profile for their account. Saved profiles in this tab is used for the checkout process.

Admin users, can edit or delete the existing profile, set the default profile and an option to **ADD A NEW PAYMENT PROFILE**.

Autopay

Autopay enrolled status indicator is located at the top of all tabs with a green dot for "AutoPay: On" or a gray dot for "AutoPay: Off" with a message, **SET UP AUTOPAY** hyperlink..

AutoPay option enables you to pay invoices automatically once the invoices are issued. Any changes made in the AutoPay tab will take effect in the next billing cycle.

Please note: Manage payments functionality is not valid for users with view-only access

PART 8

Help

Sometimes you need a bit more guidance. That's when you head to **HELP** to clear things up.

HELP also contains a 'What's new' section, providing details of just released features.

For **Frequently Asked Questions** click here

RETURN TO LEGACY

To register to receive your invoice by email, dispute an invoice or shipment, and download a billing report, please **RETURN TO LEGACY** application; these features will be available in the new FedEx Billing Online soon.

FedEx®

Go paperless and reduce your carbon footprint by registering with FedEx® Billing Online

CO_2

fedex.com