



FedEx® Billing Online

User Guide



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SECTION - 1

1. Introduction to modernized FedEx® Billing Online (FBO)

FedEx® Billing Online simplifies and streamlines your accounts payable process. From helping ensure accurate cash flow to managing payments and reporting, 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.

All the existing features of legacy FBO is now available in a modernized way in new FBO.

SECTION - 2

2. Features and benefits

Account summary



Provides balance due, dispute, 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 & search



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

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



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

Managing payments



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

Administration



Manage primary and secondary accounts and control who can access your accounts.

Reporting



Create and download your invoice/shipment reports to meet business needs.

Disputes



Dispute any invoice/shipment prior to payment and avoid paying extra charges.

SECTION – 3

3. Let's begin!

To login to the new billing application, follow the below steps:



Step 1.
Go to FedEx home page.
Login to the [home page](#).



Step 2.
Select FedEx® Billing Online.
In the FedEx home page, click **Account** and select **FedEx Billing Online**.

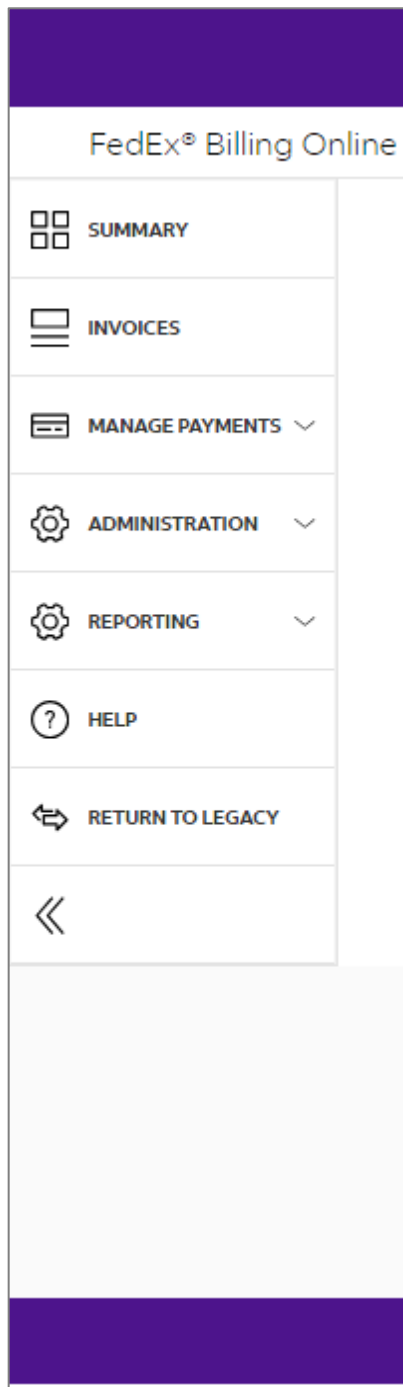


Step 3.
Login to FedEx® Billing Online.
Click **Go to FedEx Billing Online** and login to your FBO account and you will land in the below page.

The screenshot displays the FedEx Billing Online interface. At the top, the FedEx logo and a 'LOGOUT' link are visible. The main header reads 'FedEx® Billing Online' and includes a shopping cart icon with a '\$0.00' value. A left-hand navigation menu contains options: SUMMARY, INVOICES, MANAGE PAYMENTS, ADMINISTRATION, REPORTING, HELP, and RETURN TO LEGACY. The main content area shows 'Amounts are shown in USD' and three key metrics: ACCOUNT BALANCE of \$38,355.42, DISPUTED amount of \$0.00, and PAST DUE amount of \$27,246.27. A 'VIEW ALL INVOICES' button is prominently displayed. Below this is a search section with a 'Search' heading, a brief instruction on search criteria, a 'Search for*' dropdown menu, and a 'SEARCH' button.

SECTION - 4

4. Short notes on menu



Summary

Here you will get the account number information and the account summary tiles of your balance due, past due, and dispute 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.

Administration

Helps you to manage primary and secondary accounts, users, application settings, and email notifications.

Reporting

To create and download any reports, view all the downloaded reports, and enable automated settings.

Help

For extra guidance on the tool and new features.

Return to legacy

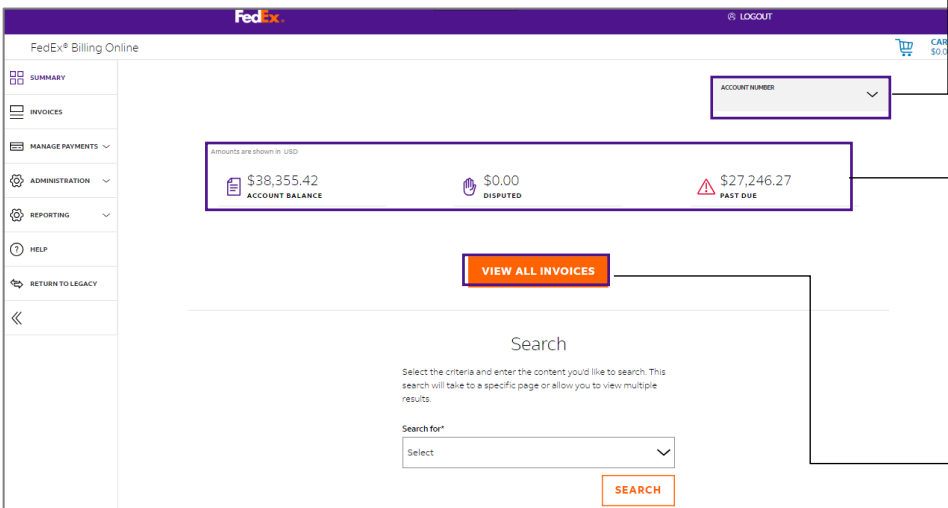
This will take you to the current FBO application.

SECTION – 5

5. Summary

After being directed to the new FBO experience, you will land on the Summary page. In the Summary page, you can view the account number information, balance due amount, dispute amount, and the past due amounts for the selected account number in your currency.

Desktop view:

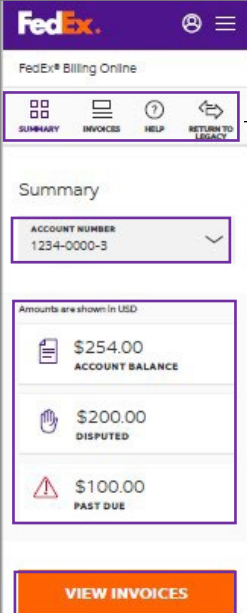


Account number drop-down provides you the list of all the account numbers you have access for.

Account Balance, Disputed, and Past Due are three account summary tiles. Selecting any of these account summary tiles, will direct you to the invoice table filtered with invoices related to the chosen summary tile.

Click **View 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, Disputed, and Past Due are three account summary tiles. Selecting any of these account summary tiles, will direct you to the invoice table filtered with invoices related to the chosen summary tile.

Click **View Invoices** to go to your Invoices page.

SECTION - 6

6. Invoices

6.1 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.

Desktop view:

Amounts are shown in USD

\$254.00 ACCOUNT BALANCE

\$200.00 DISPUTED

\$100.00 PAST DUE

INVOICE NUMBER	INVOICE DATE	INVOICE STATUS	PDF STATUS	DUE DATE	CURRENT BALANCE	ORIGINAL AMOUNT DUE	PAYMENT STATUS	PAID	CURRENCY	ADJUST
> 1-345-5323	02/10/2021	Past due	Available	02/28/2021	\$50.00	\$50.00	Pending	\$0.00	USD	\$0.00
> 1-422-1432	03/10/2021	Past due	Available	03/31/2021	\$50.00	\$50.00	Pending	\$0.00	USD	\$0.00
> 4-131-4224	04/10/2021	In dispute	Available	04/30/2021	\$100.00	\$100.00	Pending	\$0.00	USD	\$0.00
> 2-432-1333	05/10/2021	In dispute	Available	05/31/2021	\$100.00	\$100.00	Pending	\$0.00	USD	\$0.00
> 4-345-6745	06/10/2021	Open	Pending	06/30/2021	\$50.00	\$50.00	Pending	\$0.00	USD	\$0.00
> 3-112-1867	07/10/2021	Open	Pending	07/31/2021	\$50.00	\$50.00	Pending	\$0.00	USD	\$0.00
> 8-323-6723	08/10/2021	Open	Pending	08/31/2021	\$50.00	\$50.00	Pending	\$0.00	USD	\$0.00
> 2-333-9875	09/10/2021	Open	Not supported	09/30/2021	\$50.00	\$50.00	Pending	\$0.00	USD	\$0.00
> 4-333-7851	10/10/2021	Open	Not supported	10/31/2021	\$54.00	\$100.00	Pending	\$0.00	USD	\$0.00
> 6-333-7732	11/10/2021	Open	Available	11/30/2021	\$20.00	\$100.00	Pending	\$0.00	USD	\$0.00

Subtotal

Original amount due	\$600.00
Current balance	\$554.00

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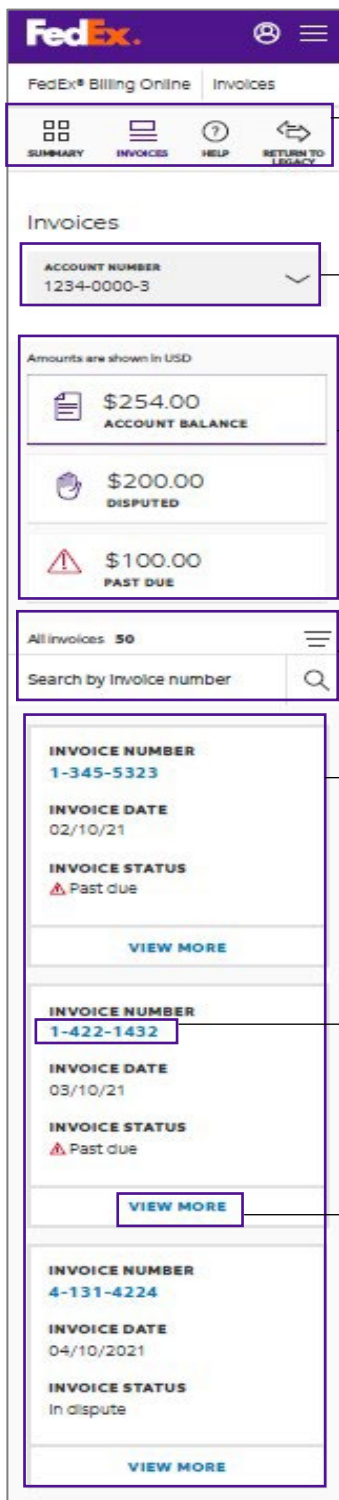
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LANGUAGE: United States, English

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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, Disputed, and Past Due** are three account summary tiles. Selecting any of these account summary tiles, will direct you to the invoice table filtered with invoices related to the chosen summary tile.

→ You can customize and search the invoices in the invoice table using these filters options.

→ In the mobile view, the invoices are listed in this manner.

→ To know more details about the invoices, click the Invoice number.

→ You can also click **View More** option, to get the details of the invoice.

Invoice table and its elements

This tab allows you to search and customize your invoice table.

Columns of the invoice table.

Clicking the arrow, will give you the details of the corresponding invoice number.

To get more details about the invoice, either click Invoice number or Invoice Details.

To download the PDF version of your invoice, click **Show Invoice (PDF)**.

6.2 Invoice table filters and search

Filter - You can customize your invoice table, by clicking **Filters**.

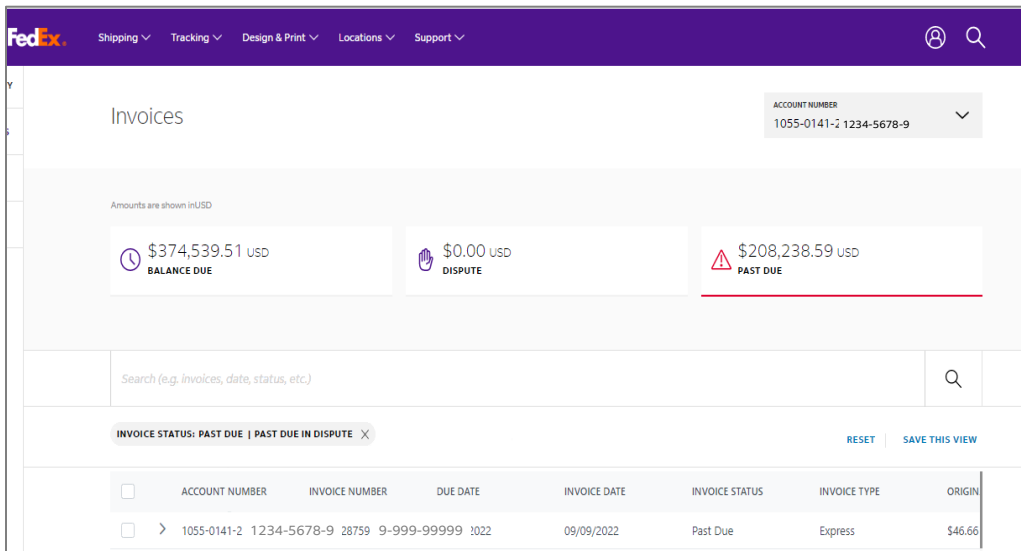
Below is the list of filters available to customize the invoice table:

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 - In dispute, Past Due, Past Due - In Dispute, Closed or Closed - In Dispute.
Invoice type	Select the invoice type as Duty Tax, Express, Ground, or Combined.
Payment status	Select the payment status as Scheduled, Submitted, Paid, Pending, Declined or Cancelled.
Payment type	Select the payment type as Pending, Scheduled or Completed.
Currency	Select your local currency from the list of currencies available.
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.

The screenshot displays the FedEx Billing Online interface for managing invoices. At the top, the FedEx logo and navigation menu are visible. The main heading is "Invoices" with an account number dropdown set to "1234-0000-3". A summary section shows three key metrics: Account Balance of \$254.00, Disputed amount of \$200.00, and Past Due amount of \$100.00. Below this is a filter sidebar with "Invoice details" and "Invoice status" sections. The "Invoice status" section has checkboxes for Open, Open - In dispute, Past due, Past due - In dispute, Closed, and Closed - In dispute. An "APPLY" button is located at the bottom right of the filter sidebar. The main table displays a single invoice row with the following data: Invoice # 6-333-7732, Invoice Date 11/10/2021, Status Open, Available, Invoice Due Date 11/30/2021, Invoice Amount \$20.00, Amount Due \$100.00, Payment Status Pending, and Currency USD. A subtotal box shows an original amount due of \$600.00 and a current balance of \$554.00. The footer includes "OUR COMPANY" links, "MORE FROM FEDEX" links, a "LANGUAGE" dropdown set to "English", and social media icons.

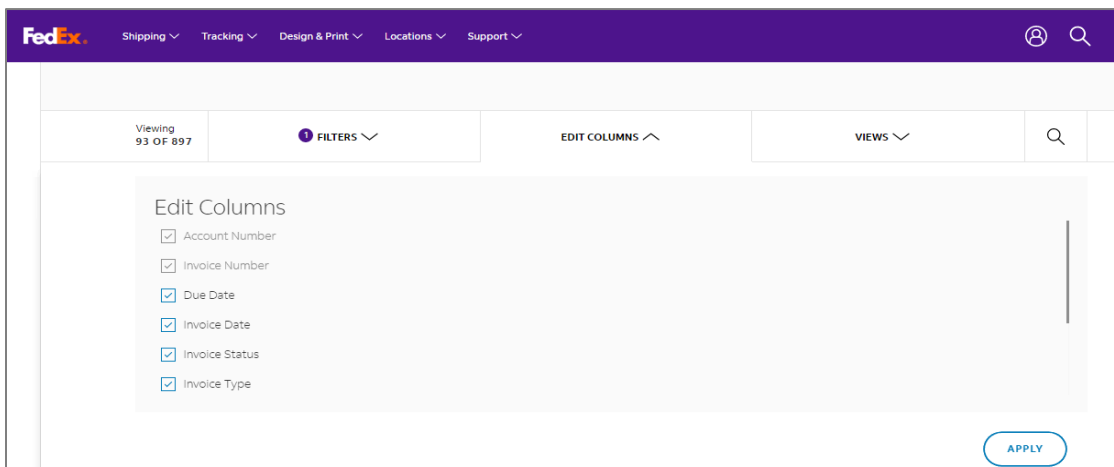
Search – To search any invoice, click the search icon, and enter your invoice number, date, or status of the invoice in the search text box. The invoice table displays the results for the search keyword.



6.3 Edit columns and views

Edit columns – Using the **Edit columns** feature; you can edit the columns available in the invoice table.

- Step 1.** Click the **Edit Columns** drop-down.
- Step 2.** Select/unselect the options you wish to include in your invoice table.
- Step 3.** Click **Apply**.



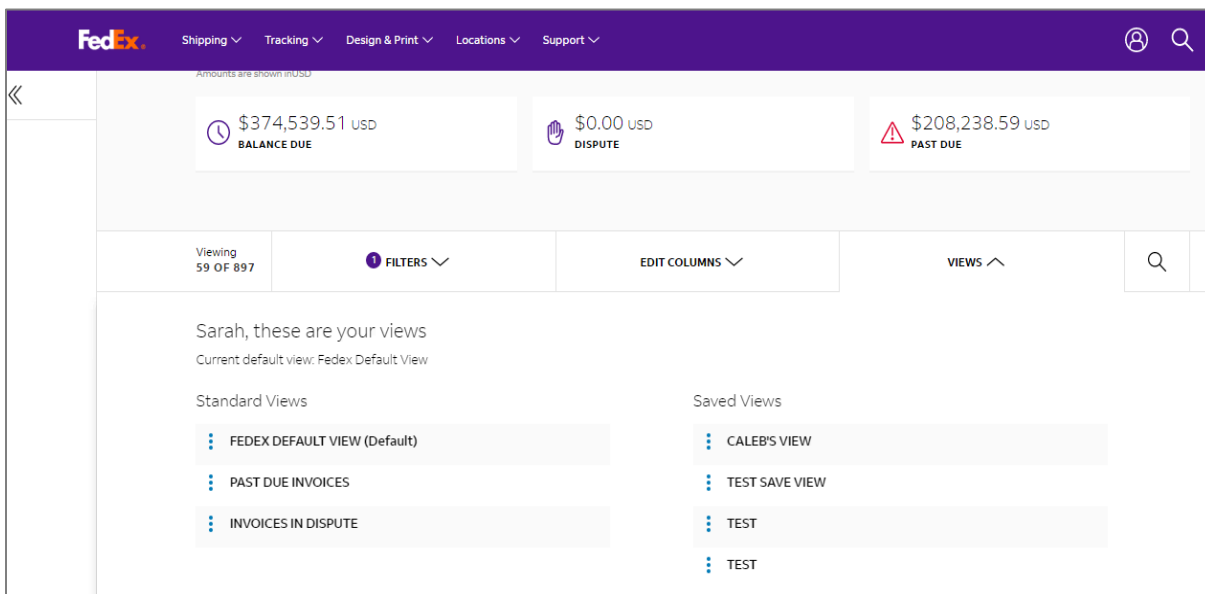
Edit views – In the invoice table, **Views** option is available to edit the view of the invoice table.

Using the Views option, you can filter the invoices you wish to see in your invoice table. By default, there are three standard views available: **FedEx Default View (default)**, **Past Due Invoices**, **Invoices in Dispute**.

These three Standard Views are the three account summary tiles available in the Summary page.

To apply these Standard Views to your invoice table, follow the below mentioned steps:

- Step 1.** Click the **Views** drop-down in the invoice table.
- Step 2.** Select the required view, from the list of Standard Views.



You can also create and save new views using the following steps:

- Step 1.** Apply the filters you wish to include in your invoice table.
- Step 2.** Click **Save this View**.
- Step 3.** Enter the name of your view in **Enter View Name** and click **Save Changes**.
- Step 4.** Click the **Views** drop-down to review your saved views.

Shipping Tracking Design & Print Locations Support

Invoices 1055-0141-2

Amounts are shown in USD

\$374,539.51 USD **BALANCE DUE**

\$0.00 USD **DISPUTE**

\$208,238.59 USD **PAST DUE**

Search (e.g. invoices, date, status, etc.)

INVOICE STATUS: PAST DUE RESET SAVE THIS VIEW

	ACCOUNT NUMBER	INVOICE NUMBER	DUE DATE	INVOICE DATE	INVOICE STATUS	INVOICE TYPE	ORIGIN
<input type="checkbox"/>	> 1055-0141-2	2	(09/09/2022	Past Due	Express	\$46.66
<input type="checkbox"/>	> 1055-0141-2		(09/09/2022	Past Due		\$1,409.

INVOICE STATUS: OPEN | PAST DUE

Name your saved view

ENTER VIEW NAME


SAVE CHANGES

CANCEL


RESET SAVE THIS VIEW

INVOICE TYPE	ORIGINAL AMOUNT
	\$2,492.63
Freight	\$11,954.45
Ground	\$3,732.03
	\$756.33
Ground	\$5,438.30
Freight	\$160.20
Ground	\$4,382.20
Freight	\$23,548.27
	\$1,203.86
	\$596.42


You can also rename or delete your saved views or set your saved view as your default view.

To rename, delete or set your saved view as default view, click the three dots  on the left side of your saved view and select the relevant option.


Amounts are shown in USD



\$606,226.36 USD
BALANCE DUE



\$2,635.19 USD
DISPUTE



\$440,836.95 USD
PAST DUE

Viewing 1023 OF 1023 FILTERS ▾ EDIT COLUMNS ▾ VIEWS ▲ 🔍

Sarah, these are your views
Current default view: Fedex Default View

Standard Views


- ⋮ FEDEX DEFAULT VIEW (Default)
- ⋮ PAST DUE INVOICES
- ⋮ INVOICES IN DISPUTE

Saved Views


- ⋮ OPEN & PAST DUES

- Set as default
- Rename
- Delete


11/21/2022	Open	Ground	\$4,382.20	\$4,382.20	USD
11/21/2022	Open	Freight	\$23,548.27	\$23,548.27	USD

To set your Standard Views as your default view, click the three dots  on the left side of the corresponding Standard View and select **Set as default**.


Amounts are shown in USD



\$606,226.36 USD
BALANCE DUE



\$2,635.19 USD
DISPUTE



\$440,836.95 USD
PAST DUE

Viewing 1023 OF 1023 FILTERS ▾ EDIT COLUMNS ▾ VIEWS ▲ 🔍

Sarah, these are your views
Current default view: Fedex Default View

Standard Views

- ⋮ FEDEX DEFAULT VIEW (Default)
- ⋮ PAST DUE INVOICES
- ⋮ INVOICES IN DISPUTE

Saved Views

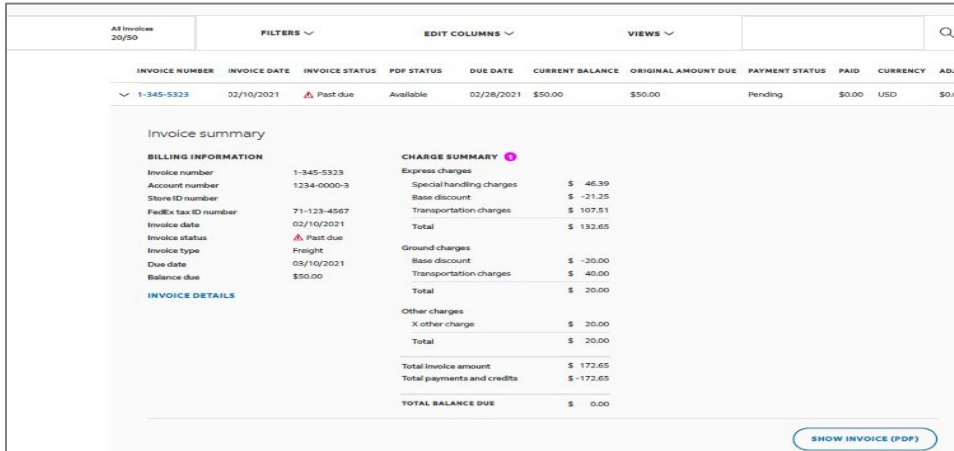
- ⋮ OPEN & PAST DUES
- ⋮ PAST DUE 0-15
- ⋮ CALEB VIEW TEST

11/21/2022	Open	Ground	\$4,382.20	\$4,382.20	USD
------------	------	--------	------------	------------	-----

SECTION - 7

7. Invoice details

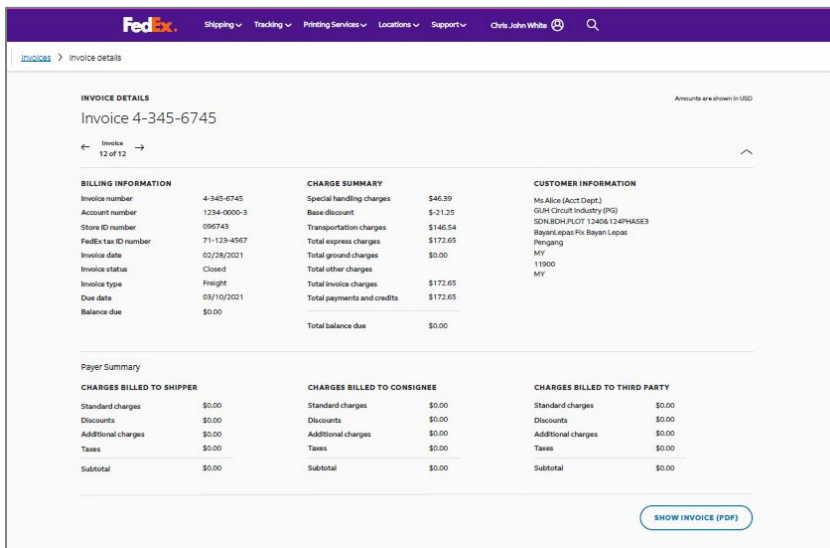
To get more details about your invoices, click the Invoice number or Invoice Details.



Then, you will get the Invoice details page.

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.



To get the PDF format of your invoice details click **Show Invoice (PDF)**.

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.

TRACKING ID	DATE	TYPE	PRODUCT GROUP	REFERENCE	PAYOR	STATUS	METER	TOTAL BILLED	BALANCE DUE
7799242618	09/30/2021	Ground	MPS	PO#HA45383-0	Shipper	Closed	987501286	\$50.00	\$50.00
284139421077	09/27/2021	Ground	MWT	PO-D1109087	Shipper	Closed	620749610	\$50.00	\$0.00
774889606984	10/06/2021	Ground	MWT	DMR#6240	Shipper	Closed	091759265	\$50.00	\$0.00
698477488960	10/07/2021	Express	MPS	No Reference	Shipper	Closed	108376598	\$50.00	\$0.00
889677406984	10/09/2021	Express	MWT	PO-D2876018	Shipper	Closed	198629608	\$50.00	\$0.00
139428421077	10/11/2021	Express	MPS	PO-R9861097	Shipper	Closed	458376098	\$50.00	\$0.00
498720964916	10/14/2021	Ground	MWT	DMR#0973	Shipper	Closed	875093854	\$50.00	\$0.00
964949872016	10/22/2021	Express	MWT	PO-D0182876	Shipper	Closed	129340561	\$50.00	\$0.00
084383358364	10/23/2021	Ground	MWT	PO#HA453835	Shipper	Closed	037430078	\$50.00	\$0.00

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

Payments and charges	
Transaction history	⌵
Merchandise sale details	⌵
Miscellaneous charges	⌵
Other miscellaneous charges	⌵

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

Historical reference	
Address correction	⌵
Approval and comments history	⌵

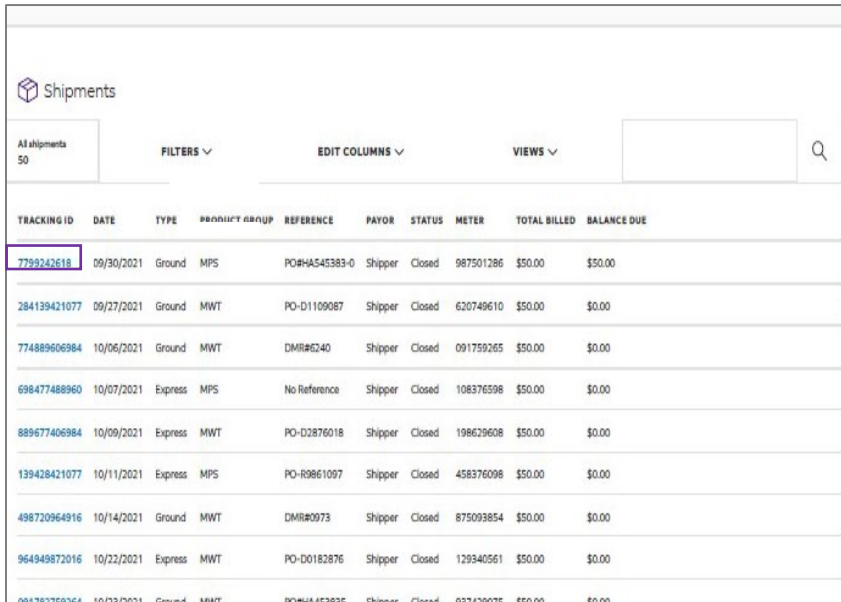
Messages includes information and messages specific to your invoice.

Messages	
Messages	⌵
Shipments included in this invoice received an earned discount. If you would like to know how it was calculated, please go to the following URL: https://www.fedex.com/EarnedDiscounts/ .	
Other discounts may apply.	
To pay your FedEx invoice, please go to www.fedex.com/payment . Thank you for using FedEx.	

SECTION - 8

8. Shipment details

To get more information about the Shipment details, in the shipment table click the Tracking ID.



The screenshot shows a web interface for 'Shipments'. At the top left is the 'Shipments' logo. Below it, there's a dropdown menu for 'All shipments' showing '50'. To the right are three dropdown menus: 'FILTERS', 'EDIT COLUMNS', and 'VIEWS'. A search bar with a magnifying glass icon is on the far right. The main content is a table with the following columns: TRACKING ID, DATE, TYPE, SERVICE GROUP, REFERENCE, PAYOR, STATUS, METER, TOTAL BILLED, and BALANCE DUE. The first row has the Tracking ID '7799242618' highlighted with a red box. The table contains 10 rows of data.

TRACKING ID	DATE	TYPE	SERVICE GROUP	REFERENCE	PAYOR	STATUS	METER	TOTAL BILLED	BALANCE DUE
7799242618	09/30/2021	Ground	MPS	PO#HA545383-0	Shipper	Closed	987501286	\$50.00	\$50.00
284139421077	09/27/2021	Ground	MWT	PO-D1109087	Shipper	Closed	620749610	\$50.00	\$0.00
774889606984	10/06/2021	Ground	MWT	DMR#6240	Shipper	Closed	091750265	\$50.00	\$0.00
698477488960	10/07/2021	Express	MPS	No Reference	Shipper	Closed	108376598	\$50.00	\$0.00
889677406984	10/09/2021	Express	MWT	PO-D2876018	Shipper	Closed	198629608	\$50.00	\$0.00
139428421077	10/11/2021	Express	MPS	PO-R0861097	Shipper	Closed	458376098	\$50.00	\$0.00
498720964916	10/14/2021	Ground	MWT	DMR#0973	Shipper	Closed	875093854	\$50.00	\$0.00
964949872016	10/22/2021	Express	MWT	PO-D0182876	Shipper	Closed	129340561	\$50.00	\$0.00
08438756064	10/23/2021	Ground	MWT	PO#HA545383-0	Shipper	Closed	091750265	\$50.00	\$0.00

On clicking the Tracking ID, the Shipment details page is displayed.

The screenshot displays the FedEx Billing Online interface for an invoice. At the top, the FedEx logo and navigation menu are visible. The main heading is 'Invoice details' with a sub-heading 'Shipment details'. The tracking ID 7799242618 is prominently displayed. Below this, there are two columns of information: 'BILLING INFORMATION' and 'TRANSACTION DETAILS'. The 'BILLING INFORMATION' column lists tracking number, invoice number, account number, invoice date, total billed, tracking ID balance due, and status. The 'TRANSACTION DETAILS' column is divided into 'Sender Information' and 'Recipient Information'. Below the details, there are two links: 'VIEW SIGNATURE PROOF OF DELIVERY' and 'CUSTOMS DOCUMENTS'. A large section below contains four expandable cards: 'Shipments', 'Payments and charges', 'Historical reference', and 'Messages'. The footer contains 'OUR COMPANY' links, 'MORE FROM FEDEX' links, a 'LANGUAGE' dropdown menu set to 'English', and social media icons for following FedEx.

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

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.

Shipments	
Shipment details	
Ship date	08/22/2022
Tendered date	08/22/2022
Payment type	Shipper
Service type	FedEx 2Day
Zone	05
Package type	Customer Packaging
Actual weight	1lbs
Rated weight	5lbs
Pieces	1
Rated method	1
Meter number	359682
Declared value	
Delivery date and time	
Service zip code	A1
Name of signer	

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

Payments and charges	
Charges	
CHARGES	
Transportation Charge	\$40.94
Discount	-\$25.97
Earned Discount	-\$3.89
Hold for Pickup	\$0.00
Fuel Surcharge	\$0.00
Total	

Historical reference provides details about customs and references.

Historical Reference		
Customs		
Entry Date		
Entry Number		
Declared Value		
Customs Value		
Reference		
ORIGINAL REFERENCE	UPDATED REFERENCE	COST ALLOCATION REFERENCE
Original Customer Reference	Original Customer Reference	Cost allocation
Purchase order number	Purchase order number	Shipment Notes
Reference #3	Reference #3	
Department number	Department number	

Messages includes information and messages related to your shipments.

Messages
The Earned Discount for this ship date has been calculated based on a revenue threshold of 22626911.29 %F2
1st attempt Aug 31, 2022 at 03:07 PM.
We calculated your charges based on a dimensional weight of 139.%F2using a dimensional factor of %F3
Distance Based Pricing, Zone 5

SECTION - 9

9. Payment reference

In the Payments and charges table, click the Reference ID.

Payments and charges							
Transaction history							
ACTIVITY	TRANSACTION DATE	TRANSACTION AMOUNT	CURRENCY	TRACKING/TRANSACTION ID	REFERENCE ID	STATUS	ORIGINAL
PAYMENT	10/21/2022	\$278,781.78	USD	999999999	99999999	Scheduled	

Then, you will get the Payment reference page, in the Payment reference page you will get the detailed information about your payments.

PAYMENT REFERENCE							
99999999							
PAYMENT DETAILS							
Payment Method	CHK						
Payment Date	2022-10-21T21:13:19Z						
Payments							
ACCOUNT NUMBER	INVOICE NUMBER	INVOICE DATE	DUE DATE	TRACKING/TRANSACTION ID	TRANSACTION AMOUNT	STATUS	
				999999999	\$46.66	Scheduled	
				999999999	\$1,409.38	Scheduled	
1234-5678-9	9-999-99999	09/08/2022	09/23/2022	999999999	\$9,493.42	Scheduled	
1234-5678-9	9-999-99999	09/08/2022	09/23/2022	999999999	\$14.69	Scheduled	
1234-5678-9	9-999-99999	09/08/2022	09/23/2022	999999999	\$1,562.94	Scheduled	
1234-5678-9	9-999-99999	09/07/2022	09/22/2022	999999999	\$26.16	Scheduled	
1234-5678-9	9-999-99999	09/06/2022	09/21/2022	999999999	\$4,281.75	Scheduled	
SUBTOTAL							
Payment Cart Total		\$278,781.78					

SECTION - 10

10. Signature proof of delivery

To get the detailed information about the tracking details and proof of delivery in the PDF format, click **View Signature Proof of Delivery** under Shipment details page.

SHIPMENT DETAILS Amounts are shown in USD

Tracking ID 7799242618

← Shipment 12 of 12 →

BILLING INFORMATION		TRANSACTION DETAILS	
Tracking ID number	7799242618	Sender information	
Invoice number	4-345-6745	Tank Design	
Account number	1234-0000-3	14 Tyler Street	
Invoice date	09/30/2022	Somerville, MA 02143	
Total billed	\$254.00	US	
Tracking ID balance due	\$0.00	Recipient information	
Status	Paid CC	Anthony Sparks	
		74 Hargrove Road	
		Banks Creek	
		Queensland, 4306	
		AUS	

[VIEW SIGNATURE PROOF OF DELIVERY](#) [CUSTOMS DOCUMENTS](#) [DISPUTE SHIPMENT](#) [ADD TO CART](#)

Then, you will get the FedEx Tracking page. To view the Proof of delivery in PDF format, click **View PDF**.

← FedEx® Tracking [Track Another Shipment](#) [Help](#)

Obtain proof of delivery

For a detailed proof of delivery, enter the 9-digit shipper or payer FedEx account number associated with this shipment.

[VIEW PDF](#)

On clicking the **View PDF**, you will get the signature proof of delivery document in PDF format.

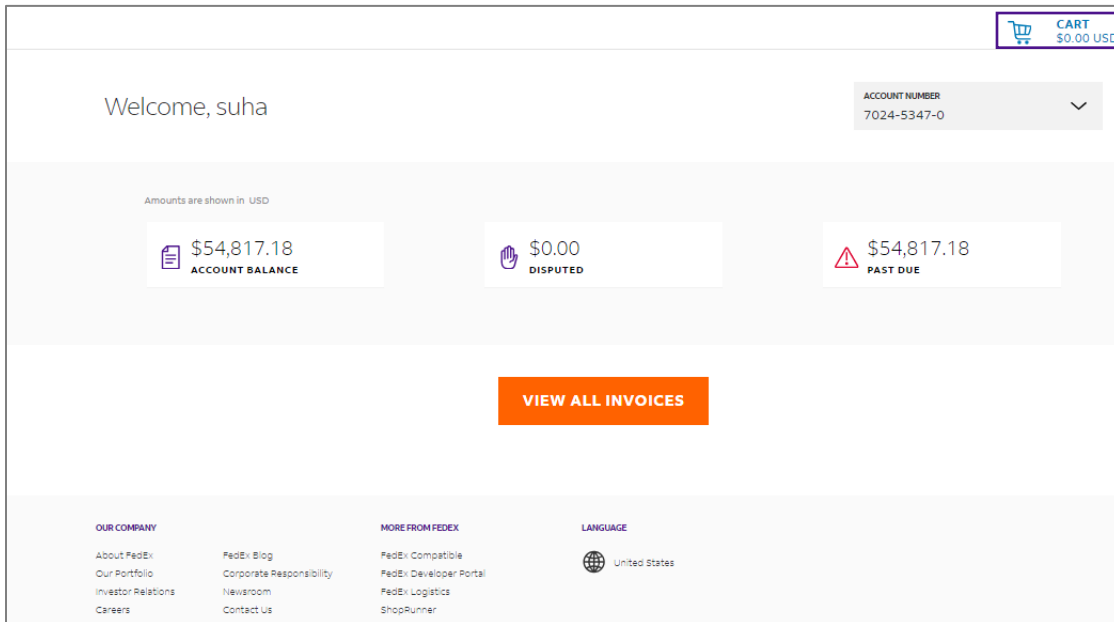
To view the complete tracking details of the shipments, click ← FedEx® Tracking. Then you will get the FedEx® Tracking page.

SECTION – 11

11. Pay cart

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

NOTE: Pay cart functionality is not available for users with view-only access.



11.1 Adding invoices/shipments to pay cart

To add invoices to pay cart, in the Summary page select any of the account summary tiles or click **View all Invoices** option to go to the Invoices page.

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.

In the Invoices page, invoices or shipments can be added to pay cart in multiple ways.

To add invoices to pay cart directly from the invoice table:

Step 1. In the invoice table, 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, Click **Add to Cart**.

Invoices

ACCOUNT NUMBER
7024-5347-0

Amounts are shown in USD

\$54,817.18 ACCOUNT BALANCE

\$0.00 DISPUTED

\$54,817.18 PAST DUE

Viewing 151 OF 151

FILTERS

EDIT COLUMNS

VIEWS

INVOICE STATUS: OPEN INVOICE STATUS: OPEN IN DISPUTE +2 FILTERS +

2 Selected ADD TO CART

	ACCOUNT NUMBER	INVOICE NUMBER	DUE DATE	INVOICE DATE	INVOICE STATUS	PDF STATUS	INVOICE TYPE	ORIGINAL AMOUNT DUE
<input checked="" type="checkbox"/>	> 7024-5347-0	3-311-66559	08/24/2023	08/09/2023	Past Due	Available	Transportation	\$356.21
<input checked="" type="checkbox"/>	> 7024-5347-0	3-311-66576	08/24/2023	08/09/2023	Past Due	Available	Transportation	\$290.80
<input type="checkbox"/>	> 7024-5347-0	3-311-66558	08/24/2023	08/09/2023	Past Due	Available	Transportation	\$290.80

To add invoices to pay cart in the invoice summary expanded view:

- Step 1.** In the invoice table, expand any invoice for which you wish to make payment by clicking the caret arrow icon of the respective invoice number.
- Step 2.** Scroll down through the invoice summary information and click **Add to Cart**.

Viewing 7 OF 7

FILTERS

EDIT COLUMNS

VIEWS

INVOICE STATUS: OPEN INVOICE STATUS: OPEN IN DISPUTE +2 FILTERS +

RESET SAVE THIS VIEW

	ACCOUNT NUMBER	INVOICE NUMBER	DUE DATE	INVOICE DATE	INVOICE STATUS
<input type="checkbox"/>	6093-9845-0	7-164-58779	08/24/2023	08/09/2023	Past Due

Invoice Summary

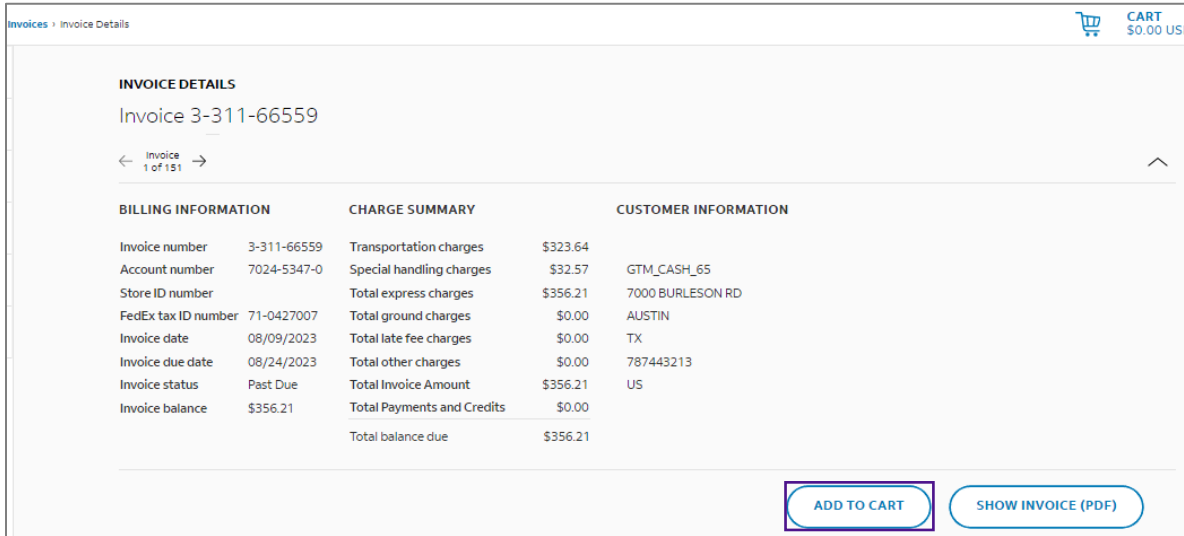
BILLING INFORMATION		CHARGE SUMMARY	
Invoice number	7-164-58779	Total express charges	\$0.00
Account number	6093-9845-0	Transportation charges	\$63.12
Store ID number		Other Handling Charges	\$74.94
FedEx tax ID number	71-0427007	Total ground charges	\$138.06
Invoice date	08/09/2023	Total late fee charges	\$0.00
Invoice due date	08/24/2023	Total other charges	\$0.00
Invoice status	Past Due	Total Invoice Amount	\$138.06
Invoice balance	\$138.06	Total Payments and Credits	\$0.00
Total balance due		\$138.06	

INVOICE DETAILS

ADD TO CART SHOW INVOICE (PDF)

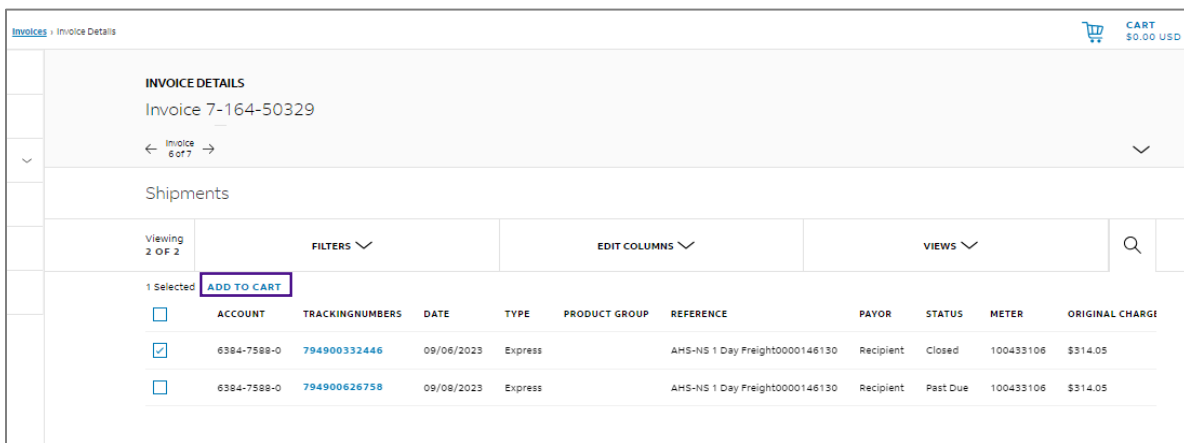
To add invoices to pay cart in the Invoice details page:

- Step 1.** In the invoice table, click the invoice number for which you wish to make payment.
- Step 2.** You will get the Invoice details page, here click **Add to Cart**.



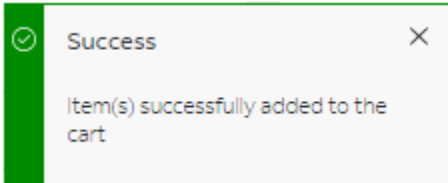
To add any specific shipments of a invoice to pay cart in the Invoice details page:


- Step 1.** In the invoice table, click the invoice number from which you wish to select the shipments for payment.
- Step 2.** The Invoice details page is displayed, in the Invoice details page, scroll down through the Shipments module.
- Step 3.** In the Shipments module, select any shipments for which you wish to make payment by clicking checkbox of the respective shipment number.
- Step 4.** Once it is selected, **Add to Cart** option will be enabled, Click **Add to Cart**.



The selected invoices and shipments will be created as a new pay cart. If there are already any invoices in the pay cart, clicking add to cart option will add the invoice or shipment to the existing pay cart.

Once the invoices or shipments are added successfully to the pay cart, you will get the below message.



Once the invoices are added to the pay cart, you can view the shopping icon next to the checkbox  of the respective invoice number and the payment status will be updated as Added to cart.

The screenshot shows the 'Invoices' page. At the top right, there is a shopping cart icon with '1' item and 'CART \$138.06 USD'. Below this is a dropdown for 'ACCOUNT NUMBER' with the value '4504-6458-9'. A summary section shows three cards: 'ACCOUNT BALANCE' of \$8,805.63, 'DISPUTED' of \$2,667.80, and 'PAST DUE' of \$8,805.63. Below the summary is a table with columns: ACCOUNT NUMBER, INVOICE NUMBER, DUE DATE, INVOICE DATE, INVOICE STATUS, PDF STATUS, INVOICE TYPE, and ORIGINAL AMOUNT. The table contains five rows of invoice data. The second row is highlighted with a blue border, and its checkbox contains a shopping cart icon.

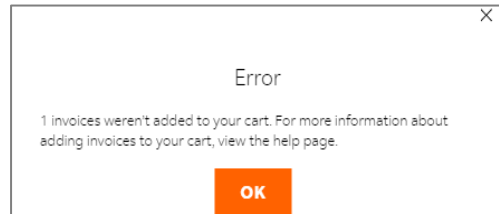
	ACCOUNT NUMBER	INVOICE NUMBER	DUE DATE	INVOICE DATE	INVOICE STATUS	PDF STATUS	INVOICE TYPE	ORIGINAL AMOUNT
<input type="checkbox"/>	> 6384-7588-0	3-311-66026	08/24/2023	08/09/2023	Closed	Available	Transportation	\$1,346.60
<input checked="" type="checkbox"/>	> 6093-9845-0	7-164-58779	08/24/2023	08/09/2023	Past Due	Available	Transportation	\$138.06
<input type="checkbox"/>	> 3195-0406-0	7-164-59419	08/24/2023	08/09/2023	Past Due	Available	Combined	\$447.64
<input type="checkbox"/>	> 6384-7588-0	7-164-59056	08/24/2023	08/09/2023	Past Due	Available	Transportation	\$314.05

Error messages

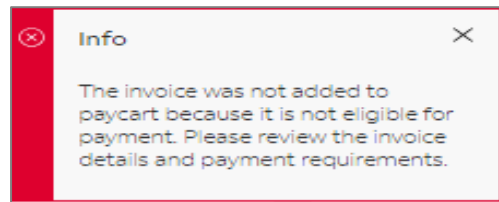
Scenarios

When you add any closed invoices, or invoices submitted for payment, or invoices scheduled for payment to pay cart, the below error message is displayed.

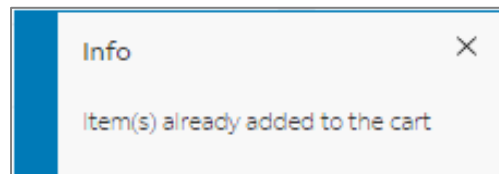
Error message



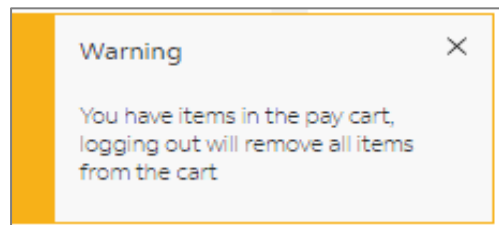
When you add any disputed invoices to pay cart, the below error message is displayed.



When you add any invoices or shipments which is already in pay cart, the below error message is displayed.



When you try to log out with the items in the pay cart and not submitted for payment, the below error message is displayed.



11.2 Review pay cart items

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

The screenshot shows the 'Invoices' page for account number 7024-5347-0. It displays three summary cards: Account Balance of \$54,817.18, Disputed amount of \$0.00, and Past Due amount of \$54,817.18. Below these are filters for 'INVOICE STATUS: OPEN' and 'INVOICE STATUS: OPEN IN DISPUTE'. A table lists three invoices with columns for Account Number, Invoice Number, Due Date, Invoice Date, Invoice Status, PDF Status, Invoice Type, and Original Amount Due.

Account Number	Invoice Number	Due Date	Invoice Date	Invoice Status	PDF Status	Invoice Type	Original Amount Due
7024-5347-0	3-311-66559	08/24/2023	08/09/2023	Past Due	Available	Transportation	\$356.21
7024-5347-0	3-311-66576	08/24/2023	08/09/2023	Past Due	Available	Transportation	\$290.80
7024-5347-0	3-311-66558	08/24/2023	08/09/2023	Past Due	Available	Transportation	\$290.80

Clicking the shopping icon or the cart will display the total number of items added to the pay cart along with its details.

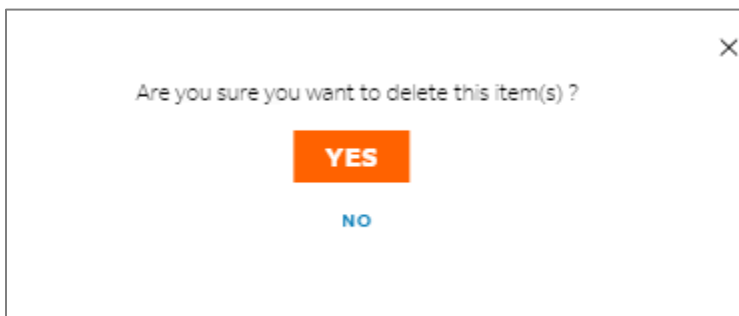
The screenshot shows the 'Cart' page for account number 7024-5347-0. It displays a summary of 2 items totaling \$647.01. A table lists the items with columns for Account Number, Invoice Number, Tracking ID, Invoice Date, Currency, Due Date, and Current Balance. There are 'EMPTY CART' and 'CHECKOUT' buttons at the bottom.

Account Number	Invoice Number	Tracking ID	Invoice Date	Currency	Due Date	Current Balance
7024-5347-0	3-311-66559		08/09/2023	USD	08/24/2023	\$356.21
7024-5347-0	3-311-66576		08/09/2023	USD	08/24/2023	\$290.80

In the Pay cart page, you can view the following information:

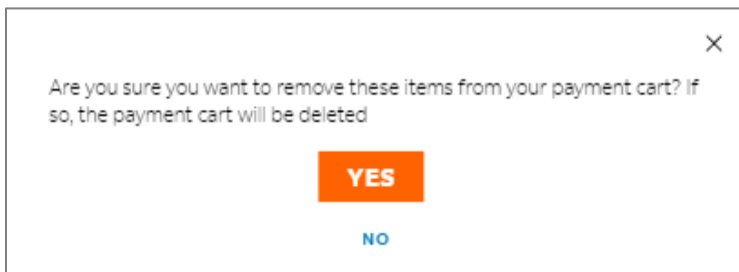
- a. Account number for which the pay cart items are created.
- b. Total number of pay cart items along with the total pay cart value.
- c. A table with the following information: Account Number, Invoice Number (This will be a hyperlink that directs you to the Invoice details page), Tracking ID (If applicable, this will be a hyperlink that directs you to the Shipment details page), Invoice Date, Currency, Due Date, and Current Balance.

At the end of each row, you can view a trash can icon. To delete any invoices in the pay cart, click the trash can icon of the respective pay cart item. Clicking the trash can icon displays the below window.



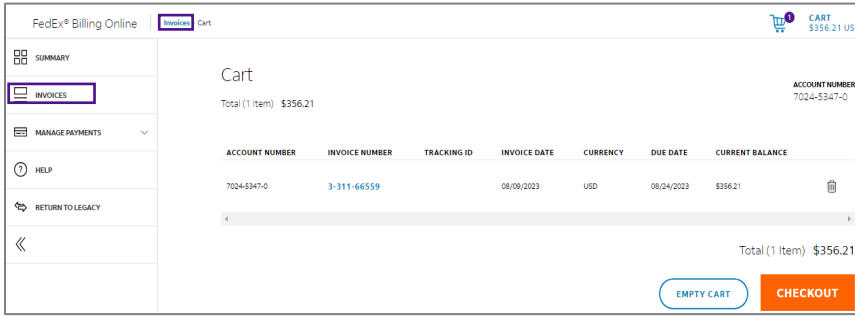
Click **Yes** to delete the respective pay cart item from the pay cart and click **No** to close the window.

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

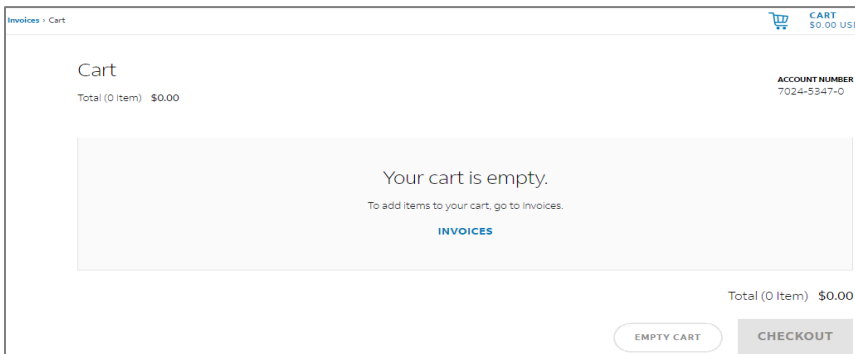


Click **Yes** to delete all the items from the pay cart and click **No** to close the window.

To return to the Invoices page, click **Invoices** on the top left corner next to the FedEx® Billing Online as indicated below or from the navigation menu, select **Invoices**.

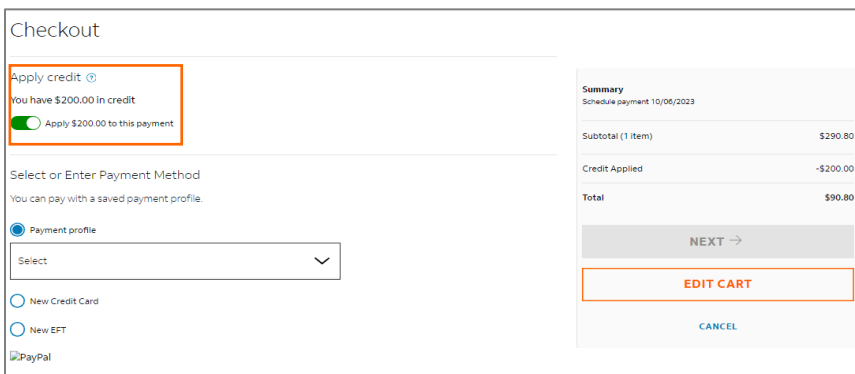


If you click the shopping icon or cart with no items in the pay cart, the below page will be displayed. Click the Invoices hyperlink to view the Invoices page.



11.3 Checkout process

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



In the Checkout page, if there are any available credits in your account you will get a Apply credit option. You can utilize this credit amount for your payment by simply enabling the toggle bar.

NOTE: If your pay cart has pay cart items of more than one account number, then apply credit option will not be displayed.

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

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.

If you don't have any saved payment profiles or you want to add any new EFT or credit card or PayPal account, select the relevant select icon and fill in all the relevant details.

New Electronic Funds Transfer (EFT) method:

To add a new EFT bank account, follow the below steps:

- Step 1.** Click the icon, next to New EFT. New EFT
- Step 2.** Fill in the mandated input fields like Name on Account, Bank Routing Number, Bank Account Number, and Confirm Bank Account Number (Re-enter for verification).
- Step 3.** Once the above-mentioned information is filled, the bank name will be auto populated in the Bank Name field. Though it is auto populated, you can still manually edit the bank name. If it is not auto populated, you can enter your bank name manually.
- Step 4.** Click the checkbox to accept the FedEx Billing Online terms and conditions.

Select or Enter Payment Method

You can pay with a saved payment profile or add a new payment method.

Payment profile

Select

New Credit Card

New EFT

PayPal

Bank account information

*Required fields

Name On Account*

Bank Routing Number*

Bank Name*

Bank Account Number*

Confirm Bank Account Number*

I agree to [Terms and conditions](#) for payments on FedEx Billing Online. If you have a debit block on your banking account, please provide your banking institution with the FedEx Company ID #1710427007. In order to authorize FedEx to process debits to your bank account, this action will prevent bank returns for the reason "Corporate Customer Not Authorized". I certify that I am an authorized user of the above listed bank account.

SAVE AS NEW PAYMENT PROFILE

Schedule a payment

Payment date*

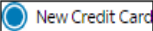
10/06/2023

NOTE: A maximum of ten EFT accounts can be saved as a payment profiles, if the account already has nine saved EFT profiles, then while adding the tenth profile, you will get a message stating “There are already nine saved EFT profiles and the maximum number of saved profiles allowed for a single account is ten.” And if there are already ten saved EFT profiles the New EFT option will be disabled. Saving a payment profile functionality is available only for admin users.


Payments made with an EFT profile must be within the FedEx threshold amount of \$1-\$999,999

New Credit Card:

To add a new credit card, follow the below steps:

- Step 1.** Click the icon, next to New Credit Card 
- Step 2.** Fill in the mandated input fields like Name on Card, Credit Card Number, Expiration Month and Year, CVV, and your Billing address.
- Step 3.** Click the checkbox to accept the FedEx Billing Online terms and conditions.

Credit card information
We accept these credit cards



Name On Card* *Required fields

Credit Card Number*

Expiration date

Month* Year* CVV*

Select Select

Billing address

Country/Territory*

United States

Address*

Apt/Suite

City*

State/Province* Zip/Postal code*

Select

I agree to [Terms and conditions](#) for payments on FedEx Billing Online. I certify that I am an authorized user of the above listed credit card account.

Schedule a payment

Payment date*

10/06/2023

NOTE: A maximum of ten credit card information can be saved as a payment profiles, if the account already has nine saved credit card profiles, then while adding the tenth profile, you will get a message stating “There are already nine saved credit card profiles and the maximum number of saved profiles allowed for a single account is ten.” And if there are already ten saved credit card profiles the new credit card option will be disabled. Saving a payment profile functionality is available only for admin users.

Payments made with a credit card profile must be within the threshold of \$1-\$99,999


New PayPal account:

To add a new PayPal account, select the PayPal option and follow the PayPal instructions.

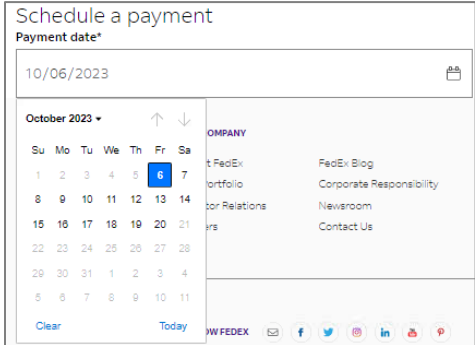
NOTE: You can save only one PayPal profile, after saving one profile the PayPal option will be disabled, and to add any new PayPal profile, delete the existing one.

Saving a payment profile functionality is available only for admin users. Payments made with a PayPal profile must be within the threshold of \$1-\$99,999.

Then, **Next** and **Save as New Payment Profile** option will be enabled.

Schedule the date on which you wish to make payment, by clicking the calendar selector  in the schedule a payment window. By default, the present day will be selected, and you can schedule the payment date within 14days.

NOTE: With the PayPal account you can only make instant payments. Schedule a payment option will not be available for PayPal payment method.



Apply credit [Ⓢ]
 You have \$200.00 in credit
 Apply \$200.00 to this payment

Select or Enter Payment Method
 You can pay with a saved payment profile or add a new payment method.

Payment profile

3D Visa Dom

New Credit Card

New EFT

PayPal

Bank account information

Name On Account* *Required fields

Bank Routing Number*

Bank Name*

Bank Account Number*

Confirm Bank Account Number*

I agree to [Terms and Conditions](#) for payments on FedEx Billing Online. If you have a debit card on your banking account, please provide your banking institution with the FedEx company ID at 1112467001 in order to authorize FedEx to process debits to your bank account. This action will prevent bank returns for the reason "Corporate Customer Not Authorized". I certify that I am an authorized user of the above listed bank account.

[SAVE AS NEW PAYMENT PROFILE](#)

Summary
 Schedule payment 10/06/2023

Subtotal (1 item)	\$290.80
Total	\$290.80

[NEXT →](#)

[EDIT CART](#)

[CANCEL](#)

Once all these payment preferences are completed, click **Next**. The Payment Summary page is displayed.

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

Payment Summary

Payment Details

VISA Test123
 Visa ending in 0002
 Expires 12/2023

\$200.00 credit applied

Scheduled payment date 10/06/2023

[EDIT DETAILS](#)

Cart

ACCOUNT NUMBER	INVOICE NUMBER	TRACKING ID	INVOICE DATE	DUE DATE	CURRENT BALANCE	CURRENCY
702453470	3-311-66576		08/09/2023		\$290.80	USD

Summary
 Schedule payment 10/06/2023

Subtotal (1 item)	\$290.80
Credit Applied	-\$200.00
Total	\$90.80

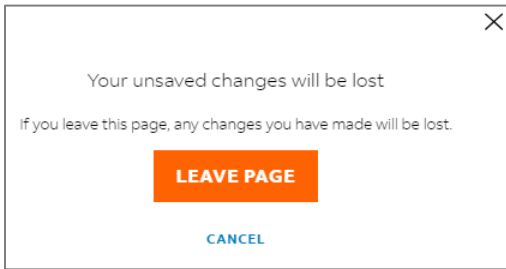
[PAY →](#)

[EDIT CART](#)

[CANCEL](#)

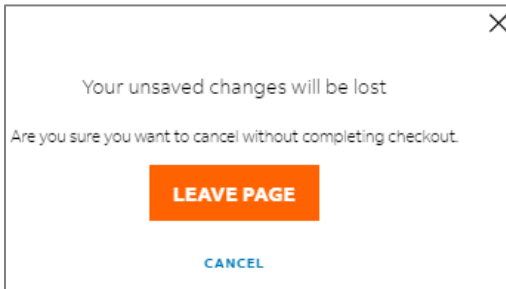
If you wish to edit any of the payment details like payment method, applied credit amount, or scheduled payment date, click **Edit Details**. It will direct you to the Checkout page, and you will be able to make the required changes.

If you wish to edit any of the pay cart items click **Edit Cart**, and you will get the below window.



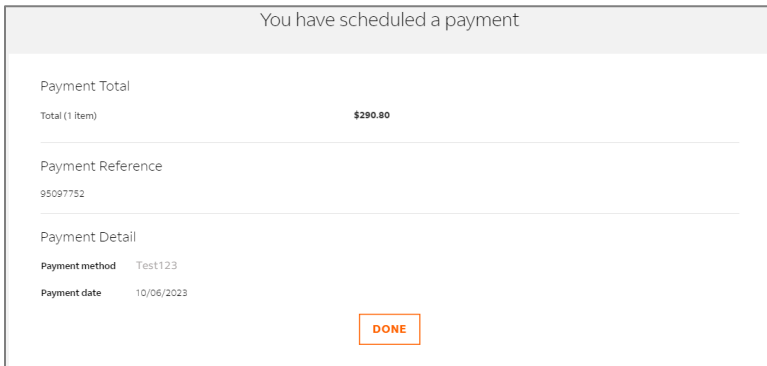
Click **Leave Page** to view the Pay cart page and click **Cancel** to close the window.

If you wish to cancel the selected payment, click **Cancel**, and you will get the below window.



Click **Leave Page** to view the Summary page and click **Cancel** to close the window.

If you wish to proceed with your payment, click **Pay**. Then, your payment will be scheduled, and the below page is displayed. The payment status of the selected invoice or shipment will be updated as Submitted, Scheduled or Pending depending on the status of the payment.



In the above page click **Done**, and you will be navigated to the Summary page.

Additional information on payment process:

- If the total pay cart value exceeds the FedEx maximum amount for the given payment method, the pay cart will not be submitted, and an error message will be displayed stating "The amount exceeds the maximum allowed for that payment type."

- In the scheduled payments, if any of the payment gets cancelled due to the wrong payment details or insufficient funds or any other conditions, the invoices or shipments will be automatically updated to open status and amount will be added to the Balance or Past due amounts depending on the invoice. You will also get an email regarding the failed payment and the payment type associated with the failed payment cart.
- If you schedule a payment for any invoices or shipments after the due date, then while submitting for payment, you will get a message that “At least one item in the pay cart is scheduled for payment after the due date and will incur a late fee.”
- If you get three returned payments on a single EFT profile, a notification will be sent to you about the failed payments and the profile will be removed automatically from the account.

SECTION – 12

12. Manage payments



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

NOTE: Manage payments functionality is not valid for users with view-only access.

12.1 Scheduled payments

Any payments scheduled manually will be displayed in the scheduled payments tab. The scheduled payments tab has a table which provides following information: Scheduled Date, Payment Profile, Payment Type, Reference ID, Cart Total, and Currency.

SCHEDULED DATE	PAYMENT PROFILE	PAYMENT TYPE	REFERENCE ID	CART TOTAL	CURRENCY
2023-10-22	EFT345	Manually scheduled	70639012	149.1	USD

In the scheduled payments table, you can view three dots  in each row. To make any changes to your scheduled payments, click the three dots. .

SCHEDULED DATE	PAYMENT PROFILE	PAYMENT TYPE	REFERENCE ID	CART TOTAL	CURRENCY
2023-10-22	EFT345	Manually scheduled	70639012	149.1	USD

- Cancel Payment
- Edit Payment Details
- View Payment Summary

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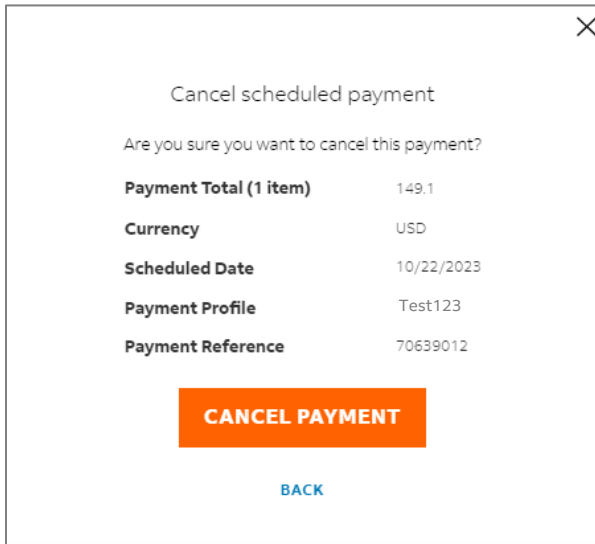
- FedEx Compatible
- FedEx Developer Portal
- FedEx Logistics
- ShopRunner

LANGUAGE

- United States

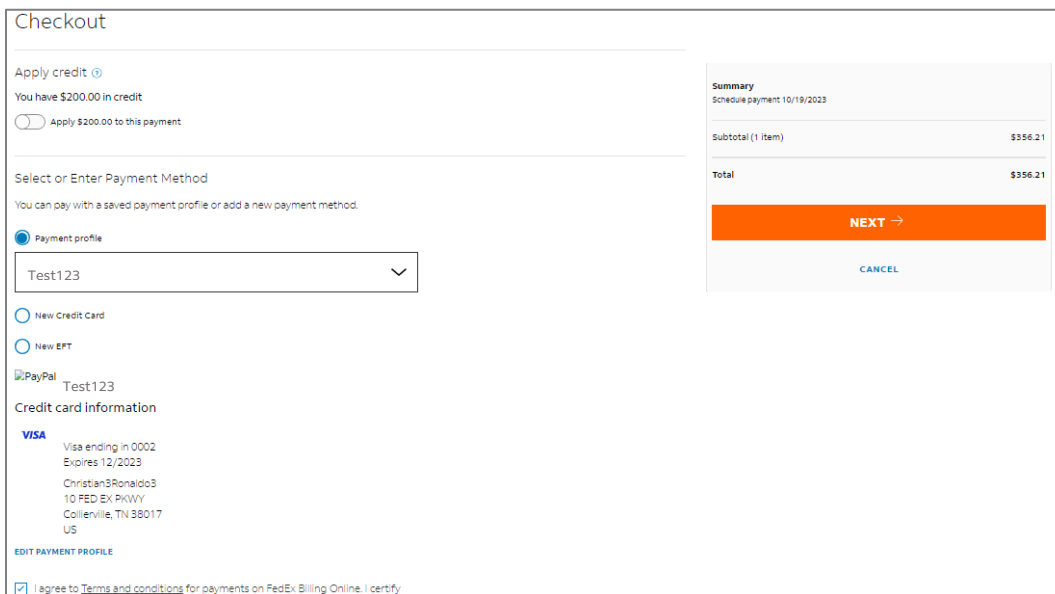
You will get three options: - Cancel Payment, Edit Payment Details, View Payment Summary.

If you wish to cancel the scheduled payment, click **Cancel Payment**. The below window is displayed.



Click **Cancel Payment** to cancel the scheduled payment and click **Back** to close the window.

If you wish to edit your payment details, click **Edit Payment Details**. It will direct you to the Checkout page. Here, you can edit your payment preferences as you wish and click the checkbox to agree to the FedEx Billing Online terms and conditions, then the **Next** option will be enabled.



Click **Next**, the Payment Summary page will be displayed. To save the changes made to your payment details, click **Save changes**. Now the scheduled payments will be updated with the edited payment details.

Payment Summary

Payment Details

TEST123
 Visa ending in 0119
 Expires 12/2040

Scheduled payment date 10/19/2023

[EDIT DETAILS](#)

Summary
 Schedule payment 10/19/2023

Subtotal (1 item)	\$356.21
Total	\$356.21

[SAVE CHANGES →](#)

Cart

ACCOUNT NUMBER	INVOICE NUMBER	TRACKING ID	INVOICE DATE	DUE DATE	CURRENT BALANCE	CURRENCY	
702453470	3-311-66559		08/09/2023		\$356.21	USD	CANCEL

If you wish to view the summarized information of your payment details, click **View Payment Summary**. It will direct you to the Payment Summary page.

← FedEx® Billing Online > [Invoices](#) > [Manage payments](#) > Summary

Payment Details

TEST123
 Visa ending in 0002
 Expires 12/2023

Scheduled payment date 10/19/2023

Summary
 Schedule payment 10/19/2023

Subtotal (1 item)	\$356.21
Total	\$356.21

[EDIT PAYMENT](#)

Cart

ACCOUNT NUMBER	INVOICE NUMBER	TRACKING ID	INVOICE DATE	DUE DATE	CURRENT BALANCE	CURRENCY	
702453470	3-311-66559		08/09/2023		\$356.21	USD	BACK

In the above page, click **Edit Payment** to view the Checkout page and click **Back** to view the Scheduled payments page.

If there are no scheduled payments for the selected account, the below page will be displayed.

Manage payments ● AutoPay: On

[Scheduled payments](#) | [Payment profiles](#) | [AutoPay](#) | [Available Credit](#)

Your scheduled payments

You do not have any scheduled payments.

To schedule a payment, go to [Invoices](#) to get started.

[INVOICES](#)

12.2 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.

For standard user:

← FedEx® Billing Online | Manage payments

Manage payments AutoPay: Off | SET UP AUTOPAY

i You have available credit, which you can apply to a payment at checkout

Scheduled payments **Payment profiles** AutoPay Available Credit

Your saved payment profiles

These are your saved methods of payment. You can view your saved payment profiles.

	TEST123 Visa ending in 0119	TEST123 Visa ending in 0119 Expires 12/2040 TEST 3614 Delverne Rd Baltimore, MD 21218 US
	TEST345 Visa ending in 0002	
	TEST678 AMEX ending in 0005	
	TEST901 EFT ACCOUNT Bank of Automation ending in 3768	

BACK

For standard user, only back option is displayed, which denotes that you can only view your saved profiles.

For admin user:

← FedEx® Billing Online | [Invoices](#) | Manage payments

Manage payments AutoPay: Off | SET UP AUTOPAY

i You have available credit, which you can apply to a payment at checkout

Scheduled payments **Payment profiles** AutoPay Available Credit

Your saved payment profiles

These are your saved methods of payment. You can view, edit, or delete your saved payment profiles or add a new payment profile.

	TEST123 Visa ending in 0119	TEST123 Visa ending in 0119 Expires 12/2040 TEST 3614 Delverne Rd Baltimore, MD 21218 US
	TEST456 Visa ending in 0002	
	TEST789 AMEX ending in 0005	
	TEST901 EFT ACCOUNT Bank of Automation ending in 3768	

EDIT | DELETE

BACK **ADD NEW PAYMENT PROFILE**

Whereas, for admin users, there is an option to edit or delete the existing profile, set the default profile and an option to add a new payment profile.

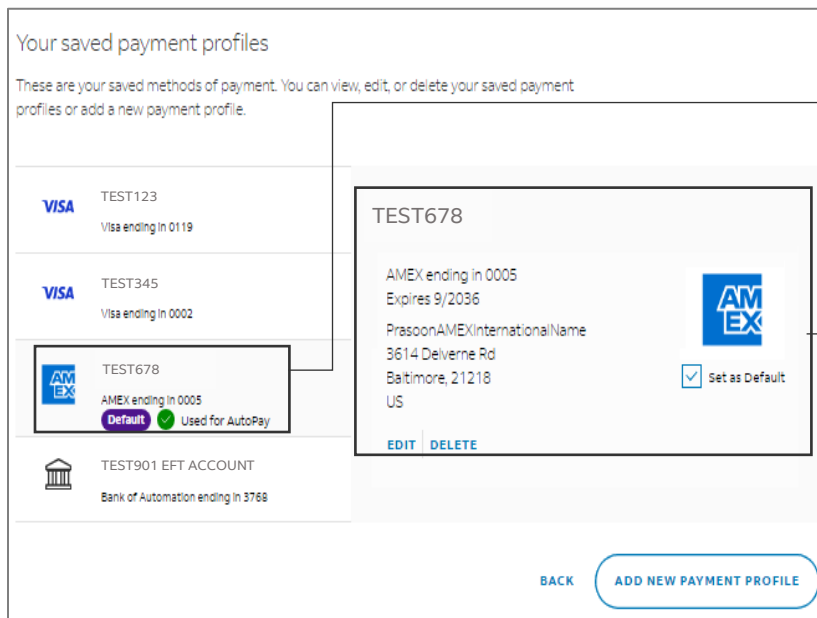
In Payment profiles tab, the saved profiles will be listed in an alphabetical order. If there is any profile which is selected as the default profile, then it will be at the top and the rest of the profiles will be listed in an alphabetical order.

If you have chosen any of the profiles for autopay, then “Used for AutoPay” message will be displayed in the saved profiles list below the profile name.

In addition to the above information, in the saved profile list, each profile will have additional information depending on the payment type of the profile.

Credit card profile:

In the saved profiles list, below credit card details are displayed:



- Icon of the card type
- Profile name
- Last four digit of the card
- In addition, the selected profile is chosen as a default payment method, so “Default” label is displayed. Also, it is chosen for autopay so “Used for AutoPay” message is displayed.


Clicking any credit card profile in the list displays the below additional information

- Card type logo
- Profile name
- Card type name along with last four digits of the card.
- Expiration details

To edit the selected profile, click **Edit** to view the below Edit Payment Method page. Here, you can edit your card details and billing information.

Edit your payment profile, then update to save any changes.

Credit card Information
We accept these credit cards



Profile Name* *Required fields

Name On Card*

TEST

Credit Card Number*

XXXXXXXXXXXXXXXX119

Expiration date

Month* 12 **Year*** 2040 **CVV***

Billing address

Country/Territory*

United States

Address*

3614 Delverne Rd

Apt/Suite

City*

Baltimore

State/Province* MD **Zip/Postal code*** 21218

I agree to [Terms and conditions](#) for payments on FedEx Billing Online. I certify that I am an authorized user of the above listed credit card account.

[CANCEL](#) [UPDATE PAYMENT PROFILE](#)

Once you complete making the updates, enter the CVV and click the checkbox to agree to the FedEx Billing Online terms and conditions, then Update Payment Profile option will be enabled.


To update the changes made to the card details, click **Update Payment Profile**, and to discard the changes made, click **Cancel**.

To delete the selected profile, click **Delete** and the below window will be displayed.

✕

Delete payment profile

Are you sure you want to delete this payment profile?



TEST123

Visa ending in 0002

Expires 12/2023

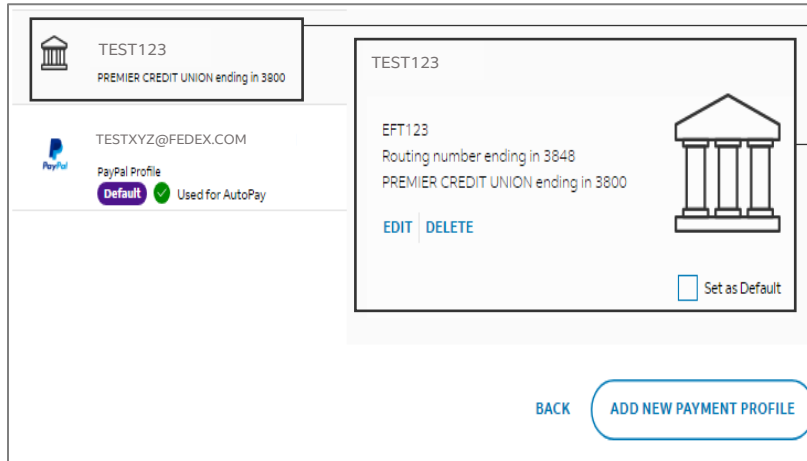
DELETE

CANCEL

Click **Delete** to delete the selected payment profile and click **Cancel** to close the window.

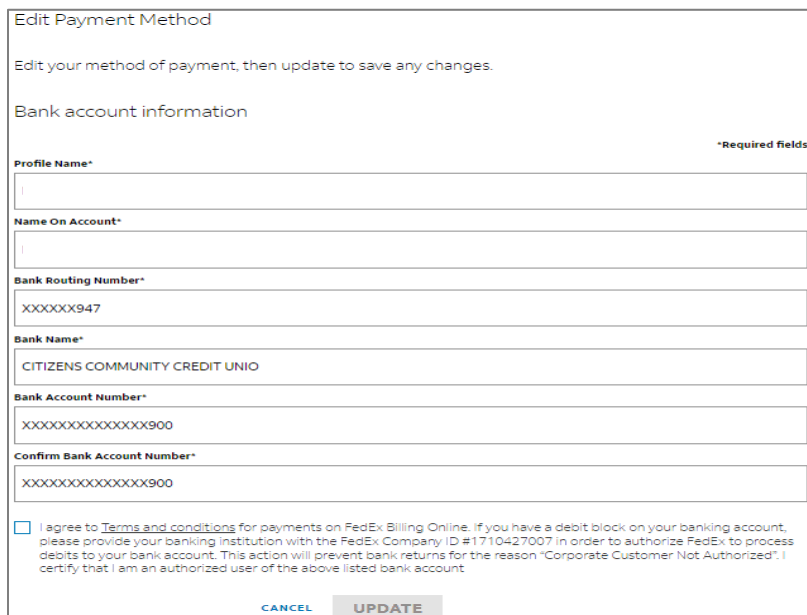
EFT profile:

In the saved profiles list, below EFT account details are displayed:



- Generic bank icon.
 - Name of the financial institution.
 - Last four digits of the account number.
- Clicking any EFT profile in the list display this additional information:
- Generic bank icon.
 - Profile name.
 - Name on bank account.
 - Name of the financial institution along with the last four digits of the account number.
 - Last four digits of the bank routing number.

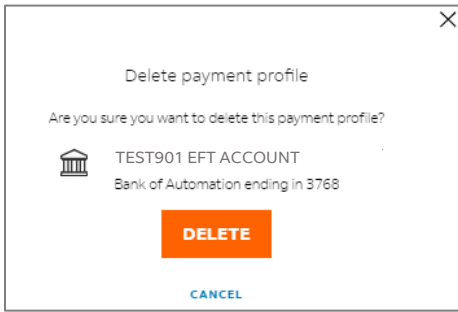
To edit the selected profile, click **Edit** and you will get the Edit Payment Method page. Here, you can edit any of your EFT account details.



Once you complete making the updates, click the checkbox to agree to the FedEx Billing Online terms and conditions, then the Update option will be enabled.

To update the changes made to the EFT account details, click **Update**, and to discard the changes made click **Cancel**.

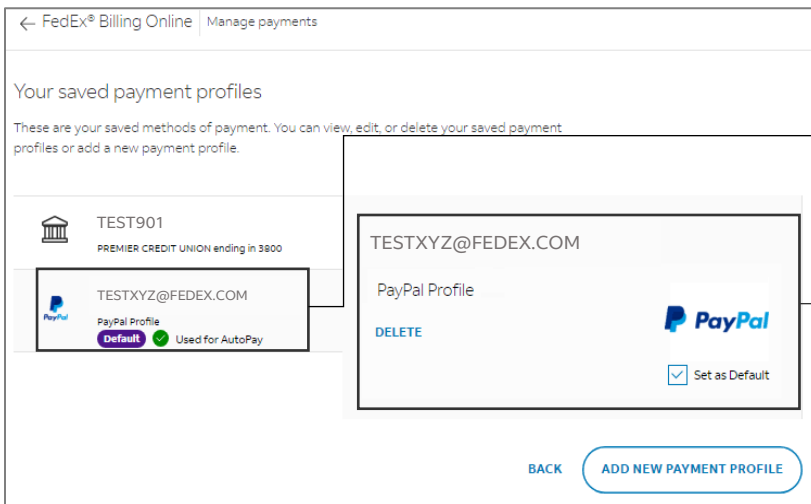
To delete the selected profile, click **Delete** and you will get the below window.



Click **Delete** to delete the selected payment profile and click **Cancel** to close the window.

PayPal profile:

In the saved profiles list, below PayPal account details are displayed:



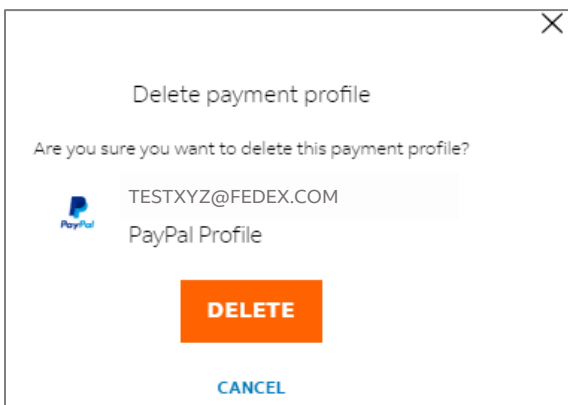
- Profile name (which is an email id linked with PayPal account).
- Payment type (i.e., PayPal profile)

Clicking PayPal profile in the list display this additional information:

- PayPal logo icon
- Profile name (which is an email id linked with PayPal account).
- Payment type (i.e., PayPal profile)

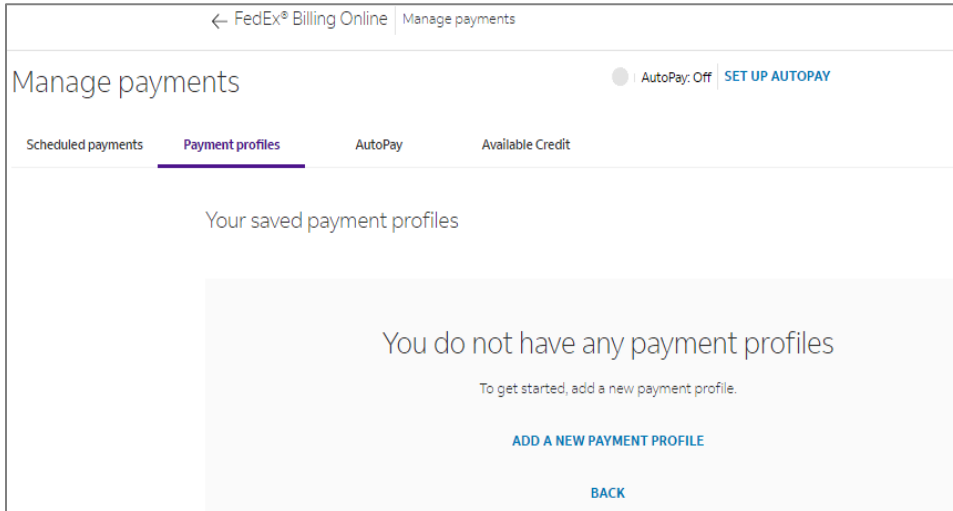
NOTE: In PayPal **Edit** option will not be available.

To delete the selected profile, click **Delete** and the below window will be displayed.



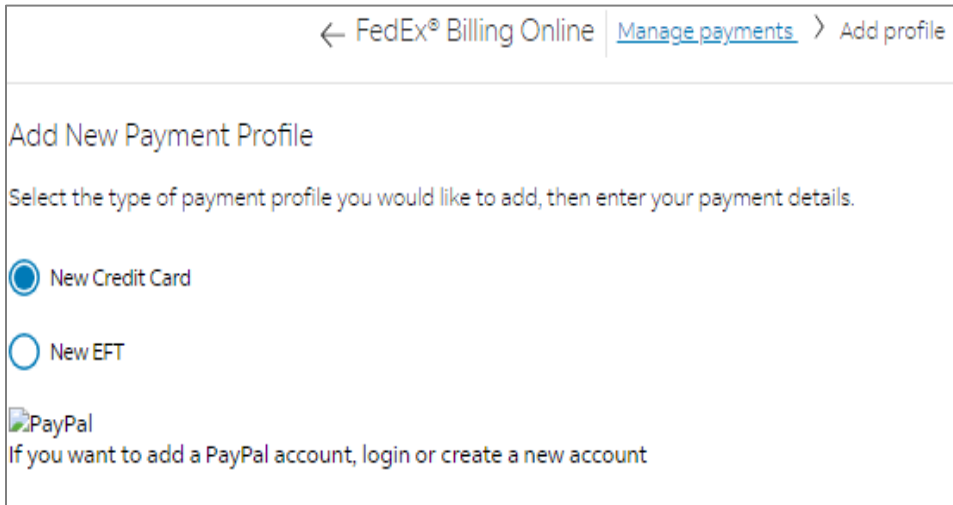
Click **Delete** to delete the selected payment profile and click **Cancel** to close the window.

If the user doesn't have any saved profiles, the below page will be displayed.



NOTE: Only Admin user will get the Add a new payment profile hyperlink.

To add a new payment profile, click **Add a New Payment Profile** hyperlink, the add new payment profile page is displayed.



To add a New EFT account, select New EFT, and fill in all the relevant information. For more details on how to create a new EFT profile, please refer to [New Electronic Funds Transfer \(EFT\) method](#) topic.

New EFT

PayPal
If you want to add a PayPal account, login or create a new account

Bank account information

*Required fields

Profile Name*

Name On Account*

Bank Routing Number*

Bank Name*

Bank Account Number*


Confirm Bank Account Number*

I agree to [Terms and conditions](#) for payments on FedEx Billing Online. If you have a debit block on your banking account, please provide your banking institution with the FedEx Company ID #1710427007 in order to authorize FedEx to process debits to your bank account. This action will prevent bank returns for the reason "Corporate Customer Not Authorized". I certify that I am an authorized user of the above listed bank account.

[BACK](#) **ADD NEW PAYMENT PROFILE**

To add new credit card, select New Credit Card and fill in all the relevant information. For more details on how to create a new credit card profile, please refer to [New Credit Card](#) topic.

Credit card information
We accept these credit cards



*Required fields

Profile Name*

Name On Card*

Credit Card Number*

Expiration date

Month* **Year*** **CVV***

Billing address

Country/Territory*

Address*

Apt/Suite

City*

State/Province* **Zip/Postal code***

I agree to [Terms and conditions](#) for payments on FedEx Billing Online. I certify that I am an authorized user of the above listed credit card account.

[BACK](#) **ADD NEW PAYMENT PROFILE**

To add a new PayPal account, please refer to [New PayPal account](#) topic.

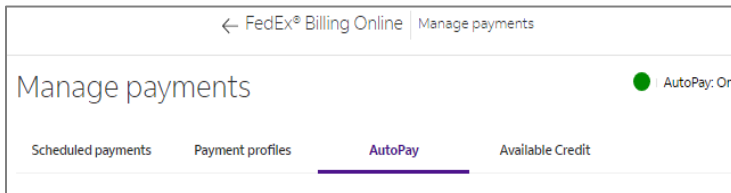
After filling the necessary information, click the checkbox to agree to the FedEx Billing Online terms and conditions, and click **Add New Payment Profile**. The profile will be added in the payment profiles tab.

In this way, you can review, create, edit, or delete your profiles and set default profiles in the Payment profiles page.

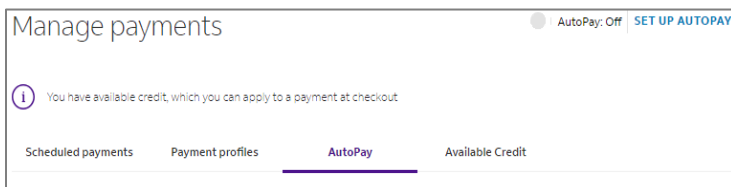
12.3 AutoPay

AutoPay option allows 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.

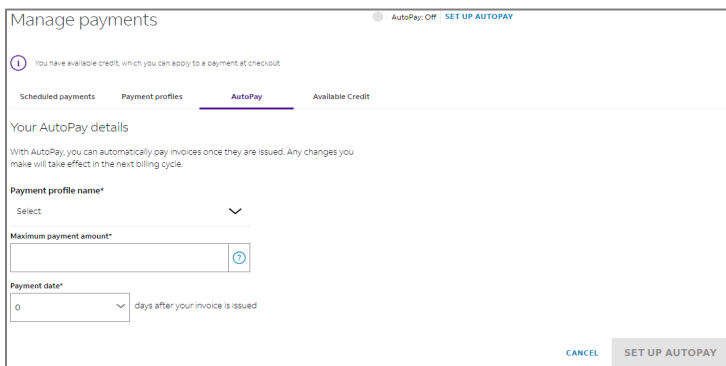
If you are currently enrolled for AutoPay, then in the Manage payments section, at the top of all tabs a green dot ● indicator with the message “AutoPay: On” will be displayed.



If you are not currently enrolled for AutoPay, then in the Manage payments page, at the top of all tabs a grey dot ● indicator with the message “AutoPay: Off” will be displayed. Next to the message, **Set up AutoPay** hyperlink is displayed.



Click **Set up AutoPay** hyperlink to view the AutoPay tab.



In the AutoPay tab, to enroll for AutoPay follow the below mentioned steps:

- Step 1.** Select the Payment profile name from the drop-down.
- Step 2.** Enter the Maximum payment amount (This should not exceed the FedEx threshold amount, for EFT account it is \$1 - \$999,999 and for Credit card and PayPal profile it is \$1 - \$99,999).
- Step 3.** Select the Payment date, i.e., the number of days after which the payment has to be made, once invoice is issued. The number of days can be between 0 and 14.
- Step 4.** Once the above information is entered, Set up AutoPay option will be enabled. Click **Set up AutoPay**.

The screenshot shows the 'Manage payments' interface with the 'AutoPay' tab selected. At the top right, it says 'AutoPay: Off' and 'SET UP AUTOPAY'. Below this, there are tabs for 'Scheduled payments', 'Payment profiles', 'AutoPay', and 'Available Credit'. The 'AutoPay' section is titled 'Your AutoPay details' and includes a note: 'With AutoPay, you can automatically pay invoices once they are issued. Any changes you make will take effect in the next billing cycle.' The form fields are: 'Payment profile name*' with a dropdown menu showing 'AMEX2'; 'Maximum payment amount*' with a text input field containing '99999' and a currency icon; and 'Payment date*' with a dropdown menu showing '14' and the text 'days after your invoice is issued'. At the bottom right, there are 'CANCEL' and 'SET UP AUTOPAY' buttons.

In the AutoPay tab below information will be displayed.

The screenshot shows the 'Manage payments' interface with the 'AutoPay' tab selected. At the top right, it says 'AutoPay: On'. Below this, there are tabs for 'Scheduled payments', 'Payment profiles', 'AutoPay', and 'Available Credit'. The 'AutoPay' section is titled 'Your AutoPay details' and includes a note: 'With AutoPay, you can automatically pay invoices once they are issued. Any changes you make will take effect in the next billing cycle.' Below the note, there is a PayPal logo and the email address 'TESTXYZ@FEDEX.COM'. The form fields are: 'Profile Name' with the value 'TESTXYZ@FEDEX.COM'; 'Maximum payment amount' with the value '\$115.00'; and 'Payment date' with the value '4 days after your invoice is issued'. At the bottom left, there are 'EDIT' and 'STOP AUTOPAY' buttons.

Now, if you wish to make any changes in the AutoPay setup, click **Edit**. The below page is displayed, here you can make the required changes and click **Update AutoPay**.

← FedEx® Billing Online | Manage payments

Manage payments ● AutoPay: On

Scheduled payments | Payment profiles | **AutoPay** | Available Credit

Your AutoPay details

With AutoPay, you can automatically pay invoices once they are issued. Any changes you make will take effect in the next billing cycle.

Payment profile name*
TESTXYZ@FEDEX.COM

Maximum payment amount*
115

Payment date*
4 days after your invoice is issued

[CANCEL](#) [UPDATE AUTOPAY](#)

If you enter the payment details above the FedEx threshold value, you will get the below error message.

Your AutoPay details

With AutoPay, you can automatically pay invoices once they are issued. Any changes you make will take effect in the next billing cycle.

Payment profile name*
AMEX2

Maximum payment amount*
999991

Please enter amount between \$1 and \$99999.99 to complete AutoPay Setup.

Payment date*
14 days after your invoice is issued

Also, if any of the invoices exceeds the maximum payment amount specified, then the auto pay function cannot be applied for that invoice and payment must be done manually for those invoices.

If you wish to stop AutoPay, in the AutoPay details page, click **Stop AutoPay**. The below window is displayed.

✕

Are you sure you want to stop AutoPay?

If you stop AutoPay, this payment profile will no longer be used to automatically pay invoices after they are issued. This change will take effect in the next billing cycle. Any currently scheduled payments will still be applied.

[STOP AUTOPAY](#)

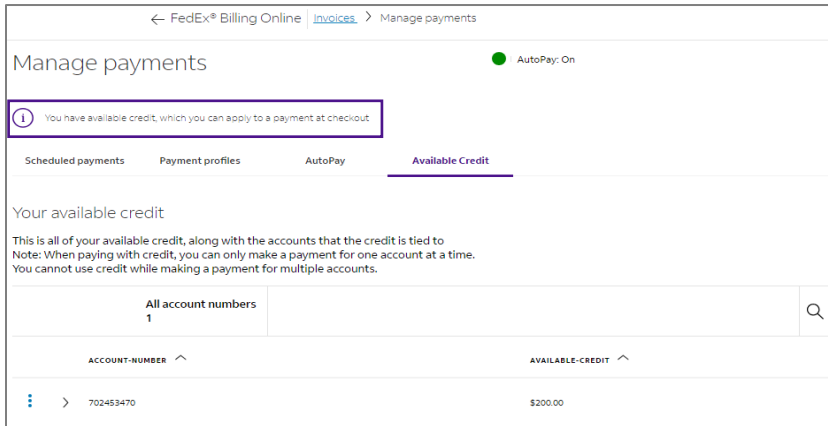
[CANCEL](#)

Click **Stop AutoPay** to opt out for AutoPay and click **Cancel** to close the window.

12.4 Available credit

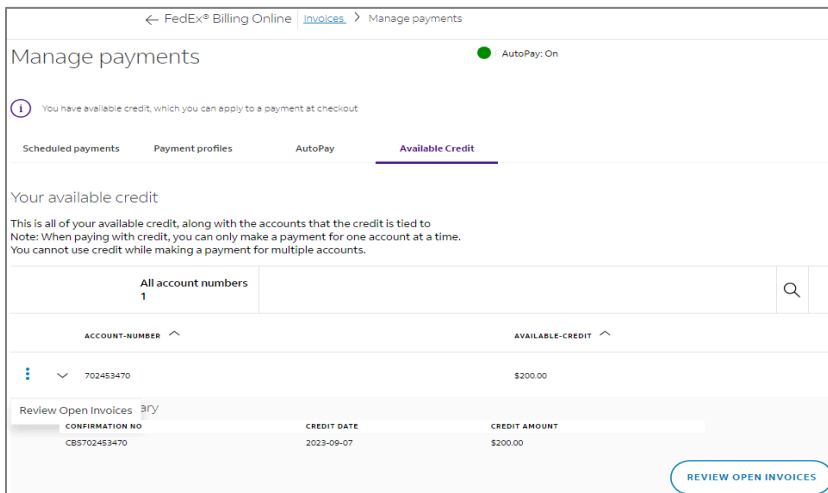
When any overpayment is made on a payment item, the extra funds will be credited to the account, and this will be shown as available credit in the Manage payments section.

NOTE: You cannot use credit amount while making a payment for multiple accounts.



In the Available Credit tab, you can view additional information of the credit amount in a tabular format, in two columns: Account Number and Available Credit along with three dots **⋮** and caret arrow icon. **>**

Clicking the caret arrow icon, **>** will show the Credit summary view along with the Confirmation number, Credit Date, and Credit Amount. Click three dots **⋮** to view the Review Open Invoices option.



Click Review Open Invoices to view the invoice table which displays all the open invoices which can be selected for payment.

SECTION - 13

13. EZ-Debit, Electronic Data Interchange, and Credit Card Billed account types

Apart from the view-only users, standard users, and admin users, there are other different users with different account types. They are EZ-Debit account, Electronic Data Interchange (EDI) account, and Credit Card Billed account (CCA).

13.1 EZ-Debit

EZ-Debit accounts use Electronic Funds Transfer (EFT) payment methods. EZ-Debit customers link their account with their bank and payments will be automatically paid (debited) from the bank.

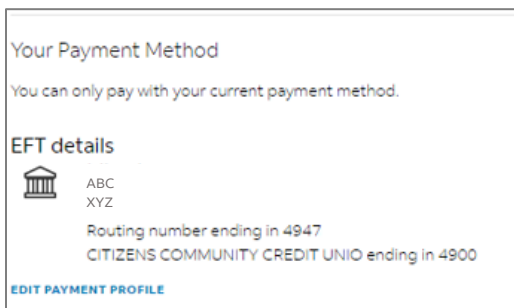
Login and payment process:

After completing the registration and logging into the FBO application for the first time, you will be directed to the create Payment profile page.

After successful registration, you should login to the application within 24 hours and create a new profile, if it is missed the account will be cashed and you will also receive an email notification about the same.

The payment profile creation will be same as creating new EFT account, please refer to [New Electronic Funds Transfer \(EFT\) method](#) (In those steps mentioned, skip step 1) for more information. After entering the details click **Save New Payment Profile**.


NOTE: EZ-Debit users can add only EFT profiles as their payment method, and they must have one single EFT profile in the account.



Your Payment Method

You can only pay with your current payment method.

EFT details

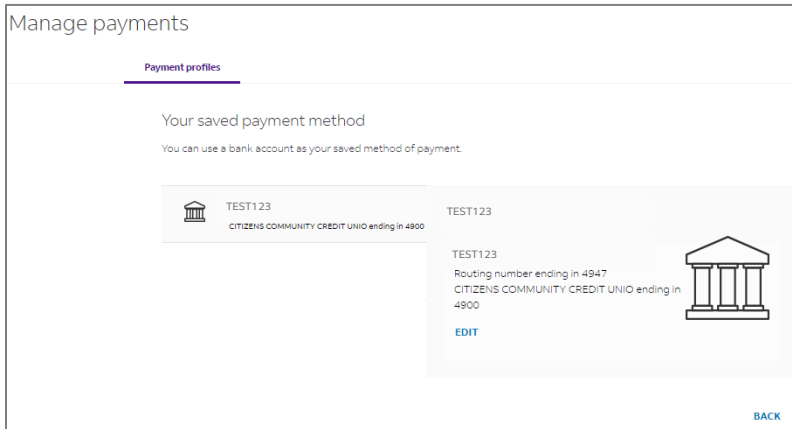
 ABC
XYZ

Routing number ending in 4947
CITIZENS COMMUNITY CREDIT UNIO ending in 4900

[EDIT PAYMENT PROFILE](#)

After adding the payment profile, you will not be able to delete or create any new payment profiles and can only the edit the existing payment profile.

Unlike other users, you will have only Payment profiles tab under Manage payments page. So, you cannot set up AutoPay for the account. Instead, the account will automatically have a threshold value as \$999,999, payment date as Invoice date +14 days, and all the invoices will be paid automatically once the invoices are issued.



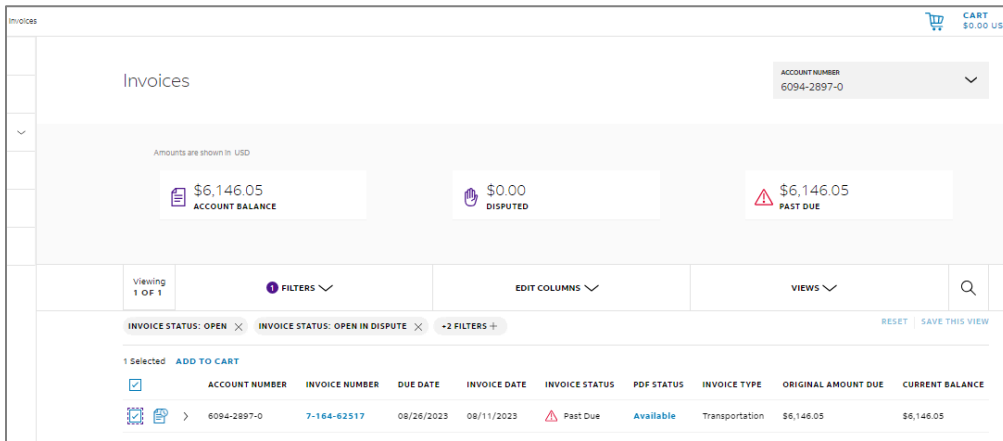
Also, under payment profiles, you will have only single EFT payment profile, with the option to edit. To edit the profile, click **Edit** and you will get the Edit Payment Method page. Here, you can edit any of your EFT account details.

The screenshot shows the 'Edit Payment Method' form. It starts with the title 'Edit Payment Method' and the instruction 'Edit your method of payment, then update to save any changes.' Below is the section 'Bank account information' with a '*Required fields' label. The form contains several input fields: 'Profile Name*', 'Name On Account*', 'Bank Routing Number*' (with the value 'XXXXXX947'), 'Bank Name*' (with the value 'CITIZENS COMMUNITY CREDIT UNIO'), 'Bank Account Number*' (with the value 'XXXXXXXXXXXXXXXX900'), and 'Confirm Bank Account Number*' (with the value 'XXXXXXXXXXXXXXXX900'). At the bottom, there is a checkbox for agreeing to terms and conditions, and two buttons: 'CANCEL' and 'UPDATE'.

Once you complete making the updates, click the checkbox to agree to the FedEx Billing Online terms and conditions, and Update option will be enabled.

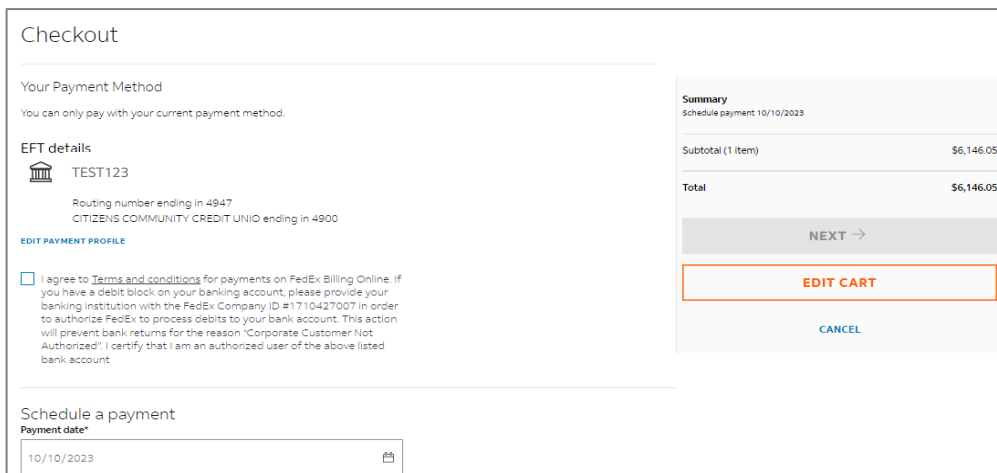
Click **Update** to update the changes made to the EFT account details and click **Cancel** to discard the changes made.

EZ-Debit account will also have an Add to Cart option similar to other standard and admin users, and if there are any invoices in past due (These are invoices which are available in the account before it is being converted to EZ-Debit) or any outstanding items which is not paid automatically (e.g., late fee) can be added to pay cart manually and payment can be made.



Procedure for adding items to pay cart and reviewing the pay cart items will be the same as it is for standard and admin users.

Click **Checkout** will display the Payment Method page. Here you can only edit existing profile (if required) and click the checkbox to agree to the FedEx Billing Online terms and conditions, then Next option will be enabled. You can also schedule the payment by selecting the payment date.



If you wish to make any changes to payment profile, click **Edit Payment Profile**.

Checkout

Your Payment Method
You can only pay with your current payment method.

Bank account information

Name On Account* *Required fields

Bank Routing Number*

Bank Name*

CITIZENS COMMUNITY CREDIT UNION

Bank Account Number*

XXXXXXXXXXXXXXXXXXXX900

Confirm Bank Account Number*

XXXXXXXXXXXXXXXXXXXX900

I agree to terms and conditions for payments of funds being drawn. If you have a debit card or your banking account, please provide your banking institution with the FedEx Company ID #11042702 in order to authorize FedEx to process credits to your bank account. This action will prevent bank returns for the reason "Corporate customer not authorized." I certify that I am an authorized user of the above listed bank account.

[CANCEL](#) [UPDATE PAYMENT PROFILE](#)

Schedule a payment
Payment date*

10/10/2023

Summary
Schedule payment 10/10/2023

Subtotal (1 Item)	\$6,146.05
Total	\$6,146.05

[NEXT →](#)

[EDIT CART](#)

[CANCEL](#)

After making the necessary changes, click **Next**. You can view the Payment Summary page.

Payment Summary

Payment Details

TEST123

Routing number ending in 4947
CITIZENS COMMUNITY CREDIT UNION ending in 4900

Scheduled payment date 10/10/2023

[EDIT DETAILS](#)

Summary
Schedule payment 10/10/2023

Subtotal (1 Item)	\$6,146.05
Total	\$6,146.05

[PAY →](#)

[EDIT CART](#)

[CANCEL](#)

Cart

ACCOUNT NUMBER	INVOICE NUMBER	TRACKING ID	INVOICE DATE	DUE DATE	CURRENT BALANCE	CURRENCY
609428970	7-164-62517		09/11/2023		\$6,146.05	USD

In Payment Summary page, you can review your payment details, pay cart items, and total pay cart value. Click **Edit details** to go back to the Checkout page and click Edit Cart to view the **Pay cart** page.

To continue with your payment, click **Pay**. Then your payment is submitted and below page is displayed.

You have scheduled a payment

Payment Total

Total (1 item)	\$6,146.05
----------------	------------

Payment Reference

95098506

Payment Detail

Payment method TEST123

Payment date 10/10/2023

[DONE](#)

If the submitted payment is cancelled and if EZ-Debit account receives three returned EFT payments, the account will be cashed, and a notification will be triggered informing about this charge.

13.2 Electronic Data Interchange (EDI)

EDI (Electronic Data Interchange) is the electronic exchange of data between entities using a standardized format. Typically, this is for larger companies with established accounts payable procedures. Available in US, CA, and few other regions. EDI accounts will not be able to make any payments.

With US EDI accounts, you will have only summary, invoices, help and return to legacy options in the navigation menu. Manage payments sections and all the tabs associated with this section will not be available, also add to cart option and shopping icon and the cart will not be available at the top right corner.

If there are any funds available on this account, you cannot directly use them, instead you will be provided with the message informing what funds on account are, also the message should direct the user to contact billing support through Help page and submit a request to use the funds available.

13.3 Credit Card Billed

Credit Card Billed (CCA) are accounts linked with a credit card and only allowed to have a single credit card on their profile. And they cannot delete, nor edit it unless it has expired, and the user needs to update it using “Update and Pay” option.

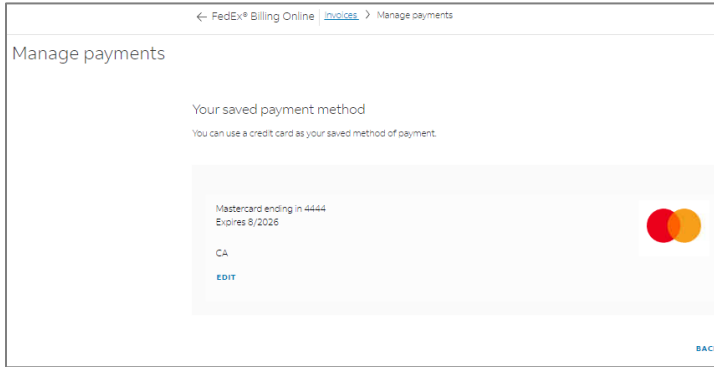
Credit Card Billed accounts has a single payment profile, but here it is credit card profile.

With Credit Card Billed accounts, invoices will be automatically paid once their account is billed using their credit card profile.

So, the invoice table will not have any open and past due invoices.

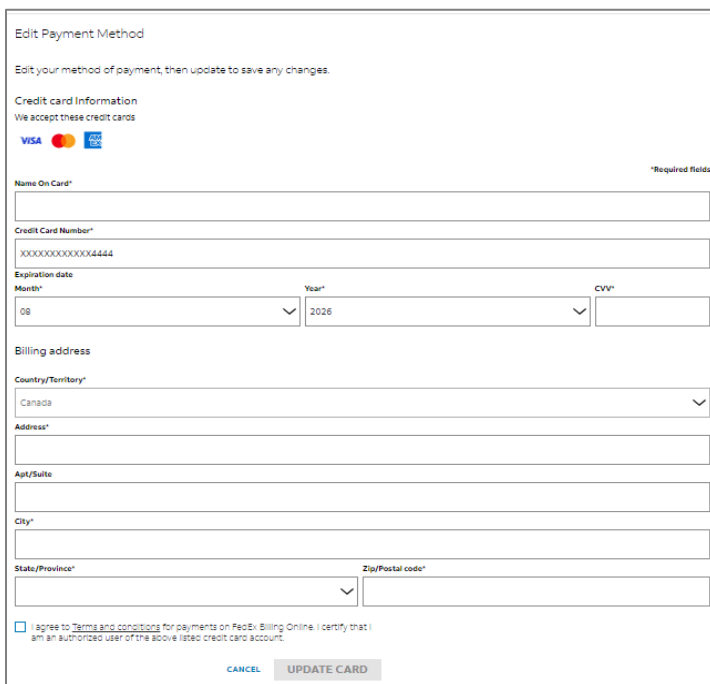
ACCOUNT NUMBER	INVOICE NUMBER	DUE DATE	INVOICE DATE	INVOICE STATUS	PDF STATUS	INVOICE TYPE	ORIGINAL AMOUNT DUE	CURRENT BALANCE
1311-8347-9	7-760-67856	08/14/2023	08/14/2023	Closed	Pending	Transportation	\$194,523	\$0
1311-8347-9	7-760-67370	08/10/2023	08/10/2023	Closed	Pending	Transportation	\$194,523	\$0
1311-8347-9	7-760-67371	08/10/2023	08/10/2023	Closed	Pending	Transportation	\$194,523	\$0
1311-8347-9	7-760-67372	08/10/2023	08/10/2023	Closed	Pending	Transportation	\$194,523	\$0
1311-8347-9	7-760-66838	08/09/2023	08/09/2023	Closed	Pending	Transportation	\$194,523	\$0
1311-8347-9	7-760-66839	08/09/2023	08/09/2023	Closed	Pending	Transportation	\$194,523	\$0
1311-8347-9	7-760-66837	08/09/2023	08/09/2023	Closed	Pending	Transportation	\$194,523	\$0

Only payment profile is available under Manage payments section, you will not have any auto pay or scheduled payments tab, instead all your invoices will be billed directly to the associated credit card and the payments will be made automatically.



Also, under payment profiles, you will have only single CC profile, with the option to edit.

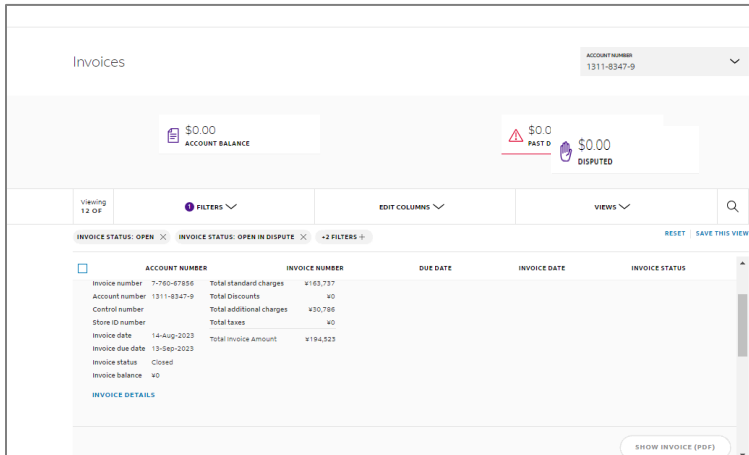
To edit the profile, click **Edit** to view the Edit Payment Method page. Here, you can edit any of your credit card details.



Once you complete making the updates, click the checkbox to agree to the FedEx Billing Online terms and conditions, and the Update option will be enabled.

To update the changes made to the credit card profile, click **Update Card**, and to discard the changes made, click **Cancel**.

Also, Credit Card Billed accounts will not have the following options: add to cart, shopping icon, cart on the top right corner, and Pay Cart page, because all the payments will be done automatically. Additionally, invoice PDF will not be available and Show invoice PDF option will be disabled.



If a saved credit card is removed from the account by any FedEx agents, the account will be cashed, and the shipments cannot be made on the account until the CC profile is updated.

What to do if the saved credit card is about to expire?

If the credit card saved in the payment profile is about to expire, a trigger will be raised 1 month and 15 days before the expiration date. A banner will be displayed in the Summary page with a message “Credit card is about to expire, and the account will be placed on hold if the card expires” and **Update Card** option. This banner will remain in the Summary page until the card is updated.

Click **Update Card** to view the Edit Payment Method page.

Edit Payment Method

Edit your method of payment, then update to save any changes.

Credit card information
We accept these credit cards

VISA, MasterCard, Discover

Name On Card* *Required fields

Credit Card Number*
XXXXXXXXXXXX4444

Expiration date
Month: 08 Year: 2020 CVV: []

Billing address

Country/Territory*
Canada

Address*

Apt./Suite

City*

State/Province* **Zip/Postal code***


I agree to [Terms and conditions](#) for payments on FedEx Billing Online. I certify that I am an authorized user of the above listed credit card account.

In Edit Payment Method page, enter the updated card details, and click the checkbox to agree to the FedEx Billing Online terms and conditions and update option will be enabled. Click **Update**.

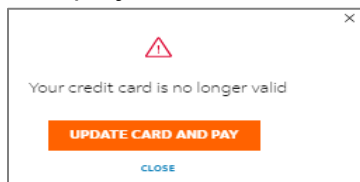
Now, the new credit card will be saved, and all the future invoices will be billed to the newly updated credit card.

What to do if the saved credit card expired?

If the saved credit card in the profile has expired, the payments for the items in the current billing cycle will be failed and the invoices will appear in Past Due status in the invoice table.

Also, in the invoice table, you can see a banner with the following message  Your credit card is no longer valid. [Update card & pay past due items](#)

This message will remain in the screen, until the credit card details are updated with the valid information. In this case, when you try to login to your Credit Card Billed account, the below window is displayed.



Click **Update Card and Pay** and you can view the Checkout page, in the Checkout page enter your updated credit card details.

In the Checkout page, the pay cart items will be automatically created with all the past due items in the invoice table, you can review the pay cart items and will not be able to edit them.

Once the credit card details are updated, click the checkbox to agree to the FedEx Billing Online terms and conditions and Update Card and Pay option will be enabled. Click **Update Card and Pay**.

Now, all the past due items will be scheduled for payment on the same day, and the future payments will be billed using the updated credit card.

NOTE: This is the only scenario where the Credit Card Billed account user can manually schedule payments, also it will update the FedEx account information with the newly updated credit card at the account level.

If an invoice is not paid for more than 45 days past due, then you will get an email informing “You must pay the selected invoices immediately or else you will lose your credit privileges as well as face third party intervention.”

If a Credit Card Billed account experiences three declined payments the account will be cashed until the CC information is updated.

Summary on different user capabilities

Users	Add to Cart, View pay cart	Manage payments	EFT and CC for one-time payment	PayPal profile	Editing saved EFT and CC profiles
View-only users	NA	NA	NA	NA	NA
Standard users	Applicable	Can only view the profiles and scheduled payments but cannot edit any of them.	Can view and add account for one-time payment but can't save profiles.	Can view and add new profile but cannot delete and edit saved profile.	Cannot add, edit, or delete saved profiles, or set default profiles.
Admin users	Applicable	Can view and edit profiles, scheduled payments and can set up AutoPay.	Can view and add account for one-time payment and can save profiles.	Can view, add, and delete profile but cannot edit profile.	Can add, edit, or delete saved profiles, or set default profiles.

SECTION - 14

14. Administration

Administration section helps you to manage your primary and secondary accounts, application settings, manage account users, and email notifications.

Under **Administration**, you will have four options: Manage accounts, Manage users, Application settings, and Email notifications.

14.1. Manage accounts

Manage accounts allows you to manage all your primary and secondary accounts. In the left navigation menu, select Administration, and click **Manage accounts**.

Manage primary accounts

Clicking Manage accounts will display Manage primary accounts page. Here, you can view the list of all the primary accounts in a tabulated format.

Primary accounts 2	FILTER		Search primary account				
<input type="checkbox"/>	ACCOUNT NUMBER	SECONDARY ACCOUNTS	CITY	STATE/PROVINCE	ZIP/POSTAL	COUNTRY	ROLE
<input type="checkbox"/>	2890-4588-0	-	MEMPHIS	TN	381203334	US	Admin
<input type="checkbox"/>	6077-2226-9	1 accounts	COLLIERVILLE	TN	380178711	US	Admin

The top left corner of the table displays the number of primary accounts linked to your account.

To add any new primary accounts to your account, click **Add primary account**, the below page is displayed.




The screenshot shows the 'fedex.com Login Registration' page. At the top, there's a purple header with the FedEx logo. Below it, the page title is 'fedex.com Login Registration'. A progress bar indicates three steps: 1 Contact Info, 2 Account Info (current), and 3 Confirmation. A message states: 'This fedex.com service requires a nine-digit FedEx account number. Please indicate which FedEx account you would like to use with this service.' Under 'Your FedEx account', there's a radio button selected for 'Enter a nine-digit FedEx account number:' with an adjacent text box. Below it is a text box for 'Nickname this account (optional):' with the placeholder 'Enter Account Nickname'. A section for 'Please provide your billing address' contains a text box with the placeholder 'Enter the billing address associated with this account.' and an 'Edit' link. At the bottom are 'Cancel' and 'Continue >>' buttons.

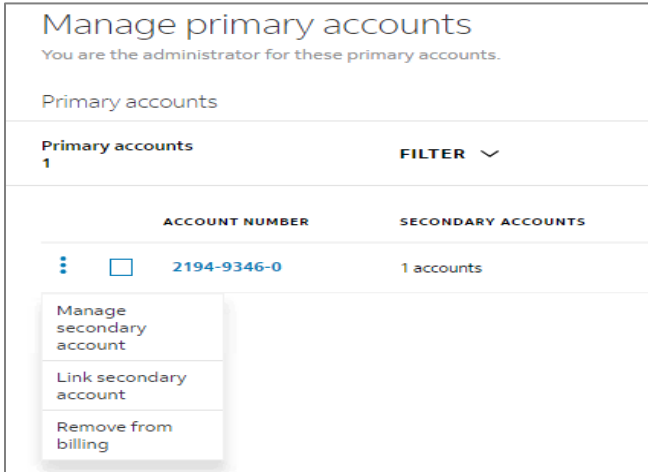
To add your account details, click the select icon and enter nine-digit account number in the text box. If you wish to add any nickname to the account, add it in the Enter Account Nickname text box and click **Continue**.

The account number will be added to your primary accounts list. If the entered account number already has an administrator, the below window is displayed.

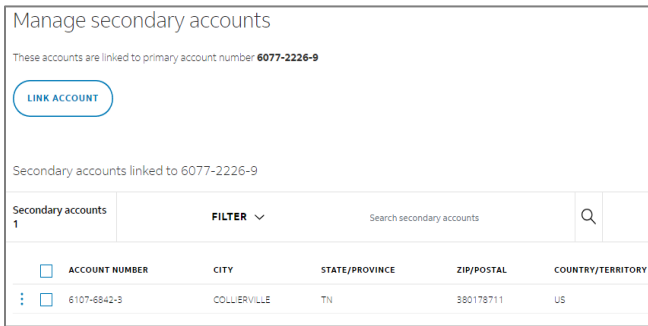
The screenshot shows a dialog box titled 'Request Access from the Account Administrator'. It has a purple header bar. The main text reads: 'An administrator already exists for this account. To request access to use this service with this account, please enter your contact information below.' Below this, it says: 'A request for access will be sent to this account's administrator, and you will receive an invitation email once access has been granted.' Under 'Your Contact Information', there are three text boxes: 'Contact name', 'Company name', and 'Email address'. At the bottom right are 'Cancel' and 'Submit' buttons.

Enter the relevant details in the respective text box and click **Submit**. An email will be sent to the respective administrator, and once the administrator grants the access, you will receive an email with the confirmation.

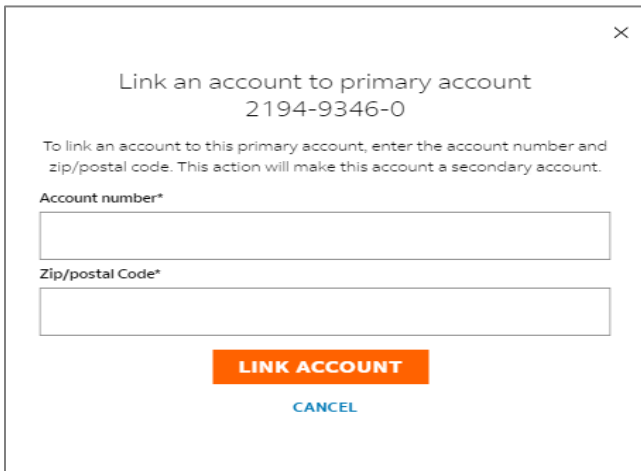
Also, in Manage primary accounts page, each row of the table has three dots  and a checkbox.  Clicking the three dots  will display three different options: Manage secondary account, Link secondary account, and Remove from billing.



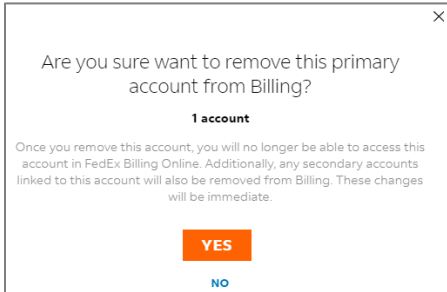
Clicking **Manage secondary account** will direct you to the Manage secondary accounts page.



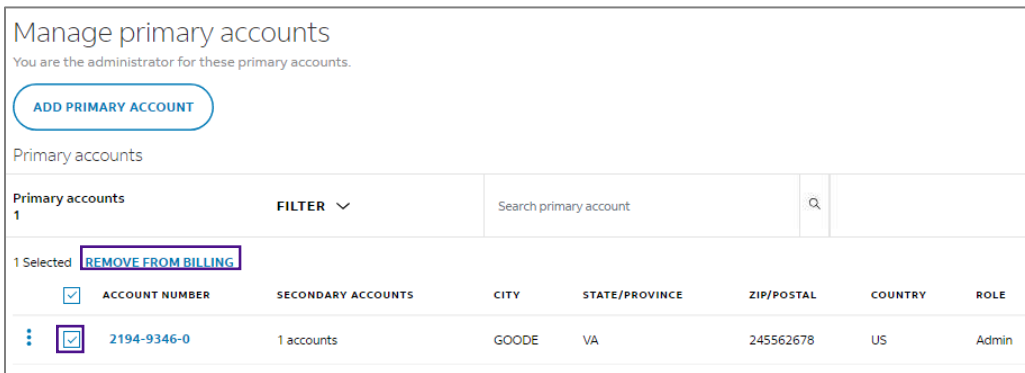
Clicking **Link secondary account** will direct you to the Link an account to primary account window.



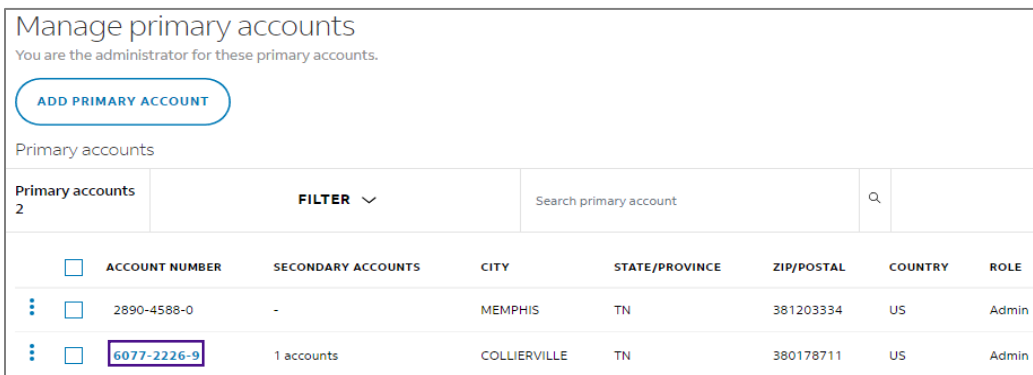
Clicking **Remove from billing** will direct you to the below window. Clicking **Yes** will remove the selected account from your FBO account and clicking **No** will close the window and no changes will be made.



Selecting the checkbox will also enable Remove from billing hyperlink. If you wish to remove multiple accounts, select the checkbox of the respective accounts, and click **Remove from billing**.



Any primary account number which has secondary accounts linked will have the hyperlink to the account number.



Clicking that hyperlink will direct you to the Manage secondary accounts page.

Manage secondary accounts

These accounts are linked to primary account number **6077-2226-9**

[LINK ACCOUNT](#)

Secondary accounts linked to 6077-2226-9

Secondary accounts 1	FILTER ▾	Search secondary accounts		Q	
<input type="checkbox"/>	ACCOUNT NUMBER	CITY	STATE/PROVINCE	ZIP/POSTAL	COUNTRY/TERRITORY
⋮ <input type="checkbox"/>	6107-6842-3	COLLIERVILLE	TN	380178711	US

Manage secondary accounts

Manage secondary accounts page displays the list of all the secondary accounts linked to the selected primary account. Similar to Manage primary accounts page you can view three dots ⋮ and a checkbox; both the options allow you to unlink from primary account. You can use either of them to unlink the selected account(s) from the primary account.

Manage secondary accounts

These accounts are linked to primary account number **2194-9346-0**

[LINK ACCOUNT](#)

Secondary accounts linked to 2194-9346-0

Secondary accounts 1	FILTER ▾	Search secondary accounts		Q	
1 selected UNLINK FROM PRIMARY ACCOUNT					
<input type="checkbox"/>	ACCOUNT NUMBER	CITY	STATE/PROVINCE	ZIP/POSTAL	COUNTRY/TERRITORY
⋮ <input checked="" type="checkbox"/>	7102-3650-0	GOODE	VA	245562678	US
Unlink from primary account					

To link any new account to the selected primary account, click **Link account** and in the below window enter the account number and Zip/Postal code and click **Link account**.

Link an account to primary account
2194-9346-0

To link an account to this primary account, enter the account number and zip/postal code. This action will make this account a secondary account.

Account number*

Zip/postal Code*

LINK ACCOUNT

CANCEL

Both Manage primary accounts and Manage secondary accounts page comprises a table with options to filter and search the account numbers in the table.

Filter: You can sort the table using the Country, State/Province, Zip/Postal, and City filters.

Manage primary accounts
You are the administrator for these primary accounts.

ADD PRIMARY ACCOUNT

Primary accounts

Primary accounts 1

FILTER ^

Search primary account

Country

State/Province

Zip/Postal

City

Country

US

APPLY

Search: To search any account numbers in the table, click the search text box, enter the account number, and click **Enter**.

Manage primary accounts
You are the administrator for these primary accounts.

Primary accounts

Primary accounts 1

FILTER v

219493460 x
 COUNTRY: US x

RESET

	ACCOUNT NUMBER	SECONDARY ACCOUNTS	CITY	STATE/PROVINCE	ZIP/POSTAL	COUNTRY	ROLE
☐	2194-9346-0	1 accounts	GOODE	VA	245562678	US	Admin

Once the filters or search keywords are entered, reset option will be enabled. To reset all the filters and keywords applied, click **Reset**.

14.2. Manage users

Manage users provides account users' details including their respective roles.

Admin user of the account is displayed above the Active users table and all the other standard and view only users list are displayed in a tabulated format.

Note: Only the Admin users can view and access the Manage users' page.

Manage users

ACCOUNT NUMBER: 6096-7461-0

Admin: Unnati Varur [CHANGE ADMIN](#)

Active users [INVITE USER](#)

<input type="checkbox"/>	FIRST NAME	LAST NAME	EMAIL	ROLE
<input type="checkbox"/>	Maddi	Venakat	PuneFedex_	<input checked="" type="radio"/> Standard <input type="radio"/> View Only 🗑️
<input type="checkbox"/>	Nagaraju	Chinna	nagaraju.chinna	<input checked="" type="radio"/> Standard <input type="radio"/> View Only 🗑️
<input type="checkbox"/>	Philp	Phis	punefedex	<input type="radio"/> Standard <input checked="" type="radio"/> View Only 🗑️

If you wish to change the admin user of the account, click **Change admin** hyperlink and the below window is displayed.

Change Admin

Current admin: Unnati Varur | CBS_Test_Email_Notification@corp.ds.fedex.com

Once you choose the user as the new admin, you will be removed as the admin but still have standard access. This change will be immediate.

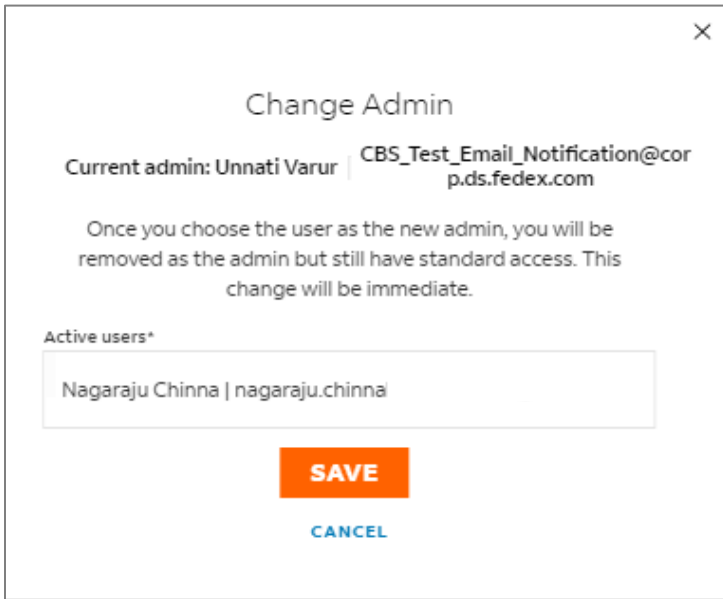
Active users*

Select

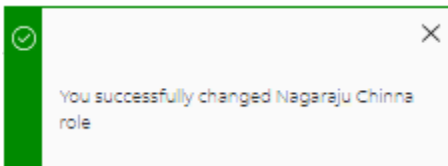
- Maddi VenakatVijayaLaxmi | PuneFedex_
- Nagaraju Chinna | nagaraju.chinna
- Philp Phis | punefedex**

[CANCEL](#)

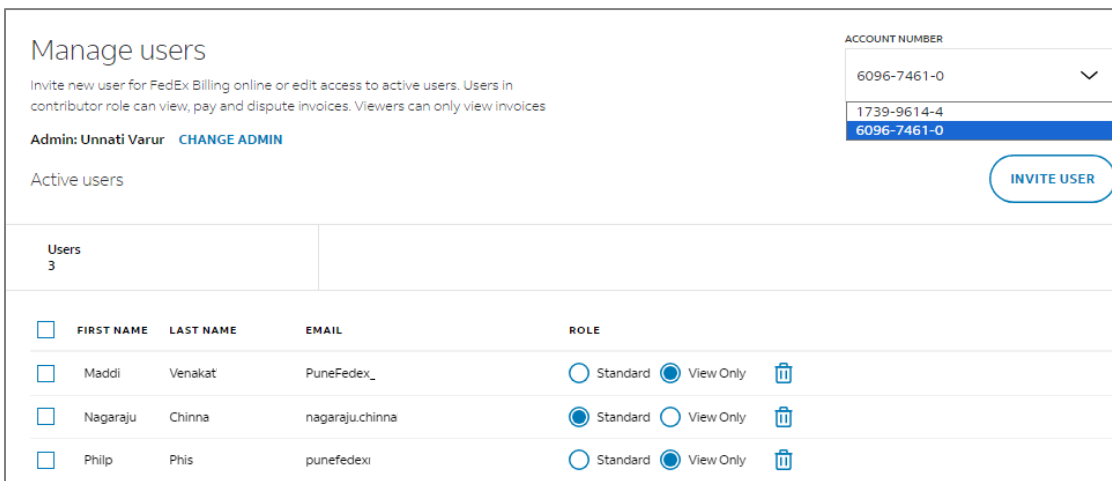
Click the Active users drop-down and you can view the list of all the active users of the account. Select the user, to whom you wish to assign the administrator role and click **Save**.








Then, the below success message will be displayed, and the new admin will only be able to view and access the Manage users page of the respective account.



If you wish to switch between other primary accounts in Manage users page, in the top right corner click account number drop-down. You can view the list of all the primary accounts, to switch between them, click the respective account number.



If you wish to remove any of the standard and view only users from the account, you can either click the trash can icon  or click the checkbox  corresponding to the respective user(s) and click **Remove user**.

1 Selected REMOVE USER				
<input type="checkbox"/>	FIRST NAME	LAST NAME	EMAIL	ROLE
<input checked="" type="checkbox"/>	Maddi	Venakat	PuneFedex_	<input type="radio"/> Standard <input checked="" type="radio"/> View Only 
<input type="checkbox"/>	Nagaraju	Chinna	nagaraju.chinna	<input checked="" type="radio"/> Standard <input type="radio"/> View Only 
<input type="checkbox"/>	Philp	Phis	punefedex	<input type="radio"/> Standard <input checked="" type="radio"/> View Only 

Clicking trash can icon  or **Remove user** will show the below window.

Are you sure want to remove these users?

2 users

Once you remove these users, they will lose access to this account. This change will be immediate.

FIRST NAME	LAST NAME	EMAIL
Maddi	Venakat	PuneFedex_
Nagaraju	Chinna	nagaraju.chinna

YES
NO

Clicking **Yes** in the above window will remove the access of the selected user(s) from the account and clicking **No** will close the window and no changes will be made.

In addition to the above features, if you wish to invite any new users to the account, click **Invite user**.

Manage users

Invite new user for FedEx Billing online or edit access to active users. Users in contributor role can view, pay and dispute invoices. Viewers can only view invoices

Admin: Unnati Varur [CHANGE ADMIN](#)

Active users

ACCOUNT NUMBER

6096-7461-0 ▼

INVITE USER

Clicking Invite user will display the below page.

Invite user

Provide some contact information for the user you want to invite to FedEx billing online.

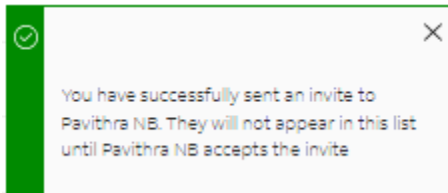
First name*


Last name*

Email*

Role*

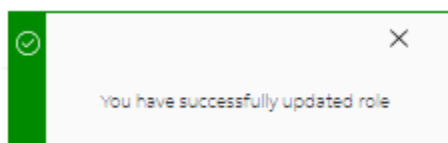
In the above window, fill in all the required information in the respective text box and click **Send invite**. Then, an email will be sent to invited user's mail id and the below success message will be displayed.



Also, an admin user can change the roles of standard and view only user at any point of time by clicking the select icon  of the respective roles.

<input type="checkbox"/>	FIRST NAME	LAST NAME	EMAIL	ROLE
<input type="checkbox"/>	Maddi	Venakat	PuneFedex_	<input type="radio"/> Standard <input checked="" type="radio"/> View Only 
<input type="checkbox"/>	Nagaraju	Chinna	nagaraju.chinna	<input checked="" type="radio"/> Standard <input type="radio"/> View Only 
<input type="checkbox"/>	Philp	Phis	punefedex	<input type="radio"/> Standard <input checked="" type="radio"/> View Only 

Once the roles of the users are changed, the below success message will be displayed.



14.3. Application settings

Application settings helps you to manage your preferences of the account. Any changes made in the application settings will be applied to the selected primary account.

Note: Only the Admin users can view and access the Application settings page.

Application settings

Any of the changes you make to these application settings will be applied to the primary account.

Primary Account Number
6096-7461-0

Update application settings

Approval buttons

Edit store ID
If you want to update a store ID, first select the account number for that store

Account number* 609674610

Store ID*

Receive invoice summary via email
You are currently receiving electronic invoices through FedEx Billing Online. If you'd like, you can opt in to receive a PDF invoice summary via email.

Invoice summary via email

SAVE SETTINGS

Under Application settings, you can make three major preferences for the account: Approval buttons, Store ID, and Invoice summary via email.

Approval buttons:

Select this option if you want to make the approval and notify features available for both FBO administrators and other users specified in the Manage users' page. This feature helps users to post their approvals and comments online, as well as send email notifications with comments to other users.

NOTE: The Approve/Notify function is covered in the upcoming sections.

The approval button allows you to toggle on and off.

Application settings

Any of the changes you make to these application settings will be applied to the primary account.

Update application settings

Approval buttons

If the approval button is toggled ON, the approval functionality will be enabled in the application.

Approve invoices and notify users

Invoices or Shipments.

These are your selected items.

Items 1						
INVOICE NUMBER	TRACKING ID	ACCOUNT	INVOICE DATE	DUE DATE	ORIGINAL CHARGES	BALANCE DUE
7-164-94603		1739-9614-4	01/05/2024	11/24/2023	\$1,645,752.33	\$1,645,752.33

Select users

Select the users that you would like to notify of these charges or request approval from. You will be able to add additional comments about these items once you choose to notify or request. **Note:** You cannot request approval from view only users.

Users 2						
1 Selected NOTIFY APPROVE APPROVE & NOTIFY						
<input type="checkbox"/>	FIRST NAME	LAST NAME	EMAIL	ROLE		
<input checked="" type="checkbox"/>	Unnati	Varur	CBS_Test_	ADMIN		
<input type="checkbox"/>	Tejal	Chikhale	sqasyn	VIEWONLY		

If it is toggle OFF the Approve/Notify option and feature will not be available for the account until it is toggled ON by an admin user.

Approve invoices and notify users

Invoices or Shipments.

These are your selected items.

Items 1						
INVOICE NUMBER	TRACKING ID	ACCOUNT	INVOICE DATE	DUE DATE	ORIGINAL CHARGES	BALANCE DUE
9-600-76120		2194-9346-0	11/09/2023	11/24/2023	\$1,233.02	\$1,233.02

Select users

Select the users that you would like to notify of these charges or request approval from. You will be able to add additional comments about these items once you choose to notify or request. **Note:** You cannot request approval from view only users.

Users 1						
1 Selected NOTIFY						
<input checked="" type="checkbox"/>	FIRST NAME	LAST NAME	EMAIL	ROLE		
<input checked="" type="checkbox"/>	Deepthi	Vilasagaram	CBS_Test_	ADMIN		

Edit Store ID:

If you wish to edit the store ID for the selected primary account or its secondary accounts, select the account number from the Account number drop-down and enter the store ID in the Store ID text box.

Edit store ID

If you want to update a store ID, first select the account number for that store

Account number*

2194-9346-0

Store ID*

123456789

If there are no secondary accounts linked to the account, then there will be no account number drop-down in the above page, instead the primary account will be displayed in a read only mode and you can still the edit the store ID for the primary account.

Edit store ID

If you want to update a store ID, first select the account number for that store

Account number* 609674610

Store ID*

01234567

Receive invoice summary via email:

This setting allows you to select whether you want to receive your invoice summary via email.

If you wish to receive all your invoices summary in a PDF format via email, toggle On the Invoice summary via email toggle bar.

Receive invoice summary via email

You are currently receiving electronic invoices through FedEx Billing Online. If you'd like, you can opt in to receive a PDF invoice summary via email.

Invoice summary via email

If it is toggled OFF, you will not be receiving the invoices summary via email, you can still view the electronic invoices in the application.

After applying all the required settings in the Application settings page, click **Save settings** to save the changes applied.

Application settings

Any of the changes you make to these application settings will be applied to the primary account.

Update application settings

Approval buttons

Edit store ID

If you want to update a store ID, first select the account number for that store

Account number*

2194-9346-0

Store ID*

123456789

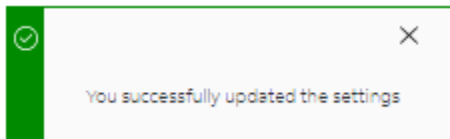
Receive invoice summary via email

You are currently receiving electronic invoices through FedEx Billing Online. If you'd like, you can opt in to receive a PDF invoice summary via email.

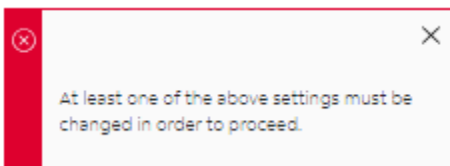
Invoice summary via email

SAVE SETTINGS

Then, all your preferences will be saved, and the below success message will be displayed.



If you tried clicking Save settings with no changes applied, the below error message will be displayed.



14.4. Email notifications

This section allows you to view and select the scenarios for which you will receive an email notification.

An admin user will receive email notification for all the scenarios listed below.

Email notifications

As an administrator, these are the email notifications that you will receive for your account.

- **Invoices:** New or past due invoices and credit notes
- **Payments:** Changes, declines, and cancellations
- **Disputes:** Resolutions and credit notes
- **Account:** Status changes

Standard and view only user can select the scenarios from the list by clicking the checkbox and once the required scenarios are selected click **Save**.

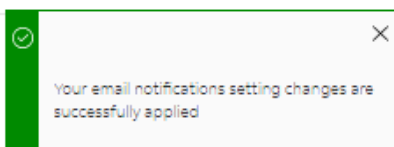
Email notifications

Select the email notifications that you would like to receive for your account.

- Invoices:** New or past due invoices and credit notes
- Payments:** Changes, declines, and cancellations
- Disputes:** Resolutions and credit notes
- Account:** Status changes

SAVE

Once the preferences are saved, the below success message will be displayed.



SECTION - 15

15. Approve/Notify items

Approve/Notify feature allows you to select invoices/shipments for approving the charges of the invoice, notify other users of the account regarding the charges and add comments (if any) related to charges.

NOTE: Approve/Notify functionality is available to Admin and standard user for US FBO+ accounts.

15.1. Adding invoices/shipments for approvals

To select invoices for approval/notify, in the Summary page, select any of the account summary tiles or click **View all Invoices** option to go to the Invoices page.

In the Invoices page, invoices or shipments can be selected for approve/notify in following ways.

To select invoices directly from the invoice table:

Step 1. In the invoice table, select the invoices you wish to add for approve/notify by clicking checkbox of the respective invoice number.

Step 2. Once it is selected, Approve/Notify option will be enabled, Click **Approve/Notify**.

The screenshot shows the 'Invoices' page for account number 6096-7461-0. It features three summary tiles: Account Balance (\$6,392.90), Disputed (\$205.20), and Past Due (\$6,392.90). Below these is a table with columns for Account Number, Invoice Number, Due Date, Invoice Date, Invoice Status, PDF Status, Invoice Type, and Original Amount Due. Two invoices are selected, and the 'APPROVE/NOTIFY' button is visible above the table.

ACCOUNT NUMBER	INVOICE NUMBER	DUE DATE	INVOICE DATE	INVOICE STATUS	PDF STATUS	INVOICE TYPE	ORIGINAL AMOUNT DUE
6096-7461-0	7-164-84461	11/22/2023	12/20/2023	Past Due	Available	Combined	\$940.95
6096-7461-0	7-164-81353	11/21/2023	12/20/2023	PAST DUE IN DISPUTE	Available	Combined	\$1,258.46
6096-7461-0	7-164-74588	11/21/2023	12/20/2023	PAST DUE IN DISPUTE	Available	Transportation	\$853.28

To select invoices in the invoice summary expanded view:

Step 1. In the invoice table, expand any invoice you wish to add for approve/notify by clicking the caret arrow icon **>** of the respective invoice number.

Step 2. Scroll down through the invoice summary information and click **Approve/Notify**.

ACCOUNT NUMBER	INVOICE NUMBER	DUE DATE	INVOICE DATE	INVOICE STATUS	PDF STATUS	INVOICE TYPE	ORIGINAL AMOUNT DUE
6096-7461-0	7-164-84461	11/22/2023	12/20/2023	Past Due	Available	Combined	\$940.95

Invoice Summary			
BILLING INFORMATION		CHARGE SUMMARY	
Invoice number	7-164-84461	Total express charges	\$0.00
Account number	6096-7461-0	Transportation charges	\$229.99
Store ID number		Other Handling Charges	\$623.29
FedEx tax ID number	71-0427007	Total ground charges	\$853.28
Invoice type	Combined	Total late fee charges	\$87.67
Invoice date	12/20/2023	Total other charges	\$0.00
Invoice due date	11/22/2023	Total Invoice Amount	\$940.95
Invoice status	Past Due	Total Payments and Credits	\$0.00

Invoice balance	\$940.95	Total balance due	\$940.95
-----------------	----------	-------------------	----------

[DISPUTE INVOICE](#)
[APPROVE/NOTIFY](#)
[ADD TO CART](#)
[SHOW INVOICE \(PDF\)](#)

To select invoices in the Invoice details page:

- Step 1.** In the invoice table, click the invoice number you wish to add for approve/notify.
- Step 2.** You will get the Invoice details page, here click **Approve/Notify**.

INVOICE DETAILS			
Invoice 7-164-84461			
BILLING INFORMATION		CHARGE SUMMARY	CUSTOMER INFORMATION
Invoice number	7-164-84461	Total express charges	\$0.00
Account number	6096-7461-0	Transportation charges	\$229.99
Store ID number		Other Handling Charges	\$623.29
FedEx tax ID number	71-0427007	Total ground charges	\$853.28
Invoice type	Combined	Total late fee charges	\$87.67
Invoice date	12/20/2023	Total other charges	\$0.00
Invoice due date	11/22/2023	Total Invoice Amount	\$940.95
Invoice status	Past Due	Total Payments and Credits	\$0.00
Invoice balance	\$940.95	Total balance due	\$940.95

[DISPUTE INVOICE](#)
[APPROVE/NOTIFY](#)
[ADD TO CART](#)
[SHOW INVOICE \(PDF\)](#)

To select any specific shipments of invoice in the Invoice details page:

- Step 1.** In the invoice table, click the invoice number from which you wish to select the shipments.
- Step 2.** In the Invoice details page, scroll down through the Shipments module.
- Step 3.** In the Shipments module, select any shipment you wish to add for approve/notify by clicking checkbox of the respective shipment number.
- Step 4.** Once it is selected, Approve/Notify option will be enabled, Click **Approve/Notify**.

INVOICE DETAILS
Invoice 7-164-74588

← Invoice 253 of 285 →

Shipments

Viewing 5 OF 5 FILTERS ▾ EDIT COLUMNS ▾ VIEWS ▾ 🔍

1 Selected [APPROVE/NOTIFY](#) [ADD TO CART](#)

	ACCOUNT	TRACKING ID	DATE	TYPE	PRODUCT GROUP	REFERENCE	PAYOR	STATUS
<input type="checkbox"/>	6096-7461-0	705947497280	11/20/2023	Ground		152800	Shipper	Past Due
<input type="checkbox"/>	6096-7461-0	705947497291	11/20/2023	Ground		Print Return0000137827	Shipper	Past Due
<input checked="" type="checkbox"/>	6096-7461-0	795065440870	11/20/2023	Ground		0000114174	Recipient	PAST DUE IN DIS
<input type="checkbox"/>	6096-7461-0	795065441534	11/17/2023	Ground		152800	Shipper	Past Due
<input type="checkbox"/>	6096-7461-0	795065444625	11/17/2023	Ground		Print Return0000137827	Shipper	Past Due

To select any specific shipments of invoice in the Shipment details page:

- Step 1.** In the invoice table, click the invoice number from which you wish to select the shipments.
- Step 2.** In the Invoice details page, scroll down through the Shipments module.
- Step 3.** In the shipments table, select the shipment you wish to add for approve/notify by clicking the tracking number.
- Step 4.** In the Shipment details page, here click **Approve/Notify**.

SHIPMENT DETAILS
Tracking ID 795070978361

← Shipment 1 of 1 →

BILLING INFORMATION		TRANSACTION DETAILS	
Tracking ID number	795070978361	Sender information	
Invoice number	3-312-02073	ANDERSON	
Account number	2194-9346-0	RV DAILY BILLED CA	
Invoice date	11/09/2023	1900 SUMMIT TOWER BLVD	
Due date	11/24/2023	MISSISSAUGA ON L4W5K6	
Total billed	\$43.18	CA	
Tracking ID balance due	\$43.18	Recipient information	
Status	Past Due	CHIP FROEHLICH	
		BOOK WAREHOUSE	
		35 S WILLOWDALE DR	
		GRT TEST ACCOUNT- DO NOT TOUCH	
		LANCASTER PA 17602	
		US	

VIEW SIGNATURE PROOF OF DELIVERY DISPUTE CHARGES CUSTOM DOCUMENT APPROVE/NOTIFY [ADD TO CART](#)

15.2. Approve invoices and notify users

Once you select the invoice(s)/shipment(s) and click Approve/Notify, you will be directed to the Approve invoices and notify users' page.

Approve invoices and notify users

Invoices or Shipments.

These are your selected items.

Items						
1						
INVOICE NUMBER	TRACKING ID	ACCOUNT	INVOICE DATE	DUE DATE	ORIGINAL CHARGES	BALANCE DUE
9-600-76120	000000070866	2194-9346-0	11/09/2023	11/24/2023	\$1,168.35	\$1,168.35

Select users

Select the users that you would like to notify of these charges or request approval from. You will be able to add additional comments about these items once you choose to notify or request. **Note:** You cannot request approval from view only users.

Users				
1				
<input type="checkbox"/>	FIRST NAME	LAST NAME	EMAIL	ROLE
<input type="checkbox"/>	Deepthi	Vilasagaram	CBS_Test,	ADMIN

Add comments only

Any comments that you add here will be saved in the Approval and comment history section of the Invoice details or Shipment details page. These comments will not be sent to any users.

0/250 character

[ADD COMMENTS](#)

In Approve invoices and notify users page, you can view Invoices or shipments table, Select users table, and Add comments text box.

The **Invoices or Shipments** table provides the list of all the invoices and shipments added for approvals and notifications.

Invoices or Shipments.

These are your selected items.

Items						
1						
INVOICE NUMBER	TRACKING ID	ACCOUNT	INVOICE DATE	DUE DATE	ORIGINAL CHARGES	BALANCE DUE
9-600-76120	000000070866	2194-9346-0	11/09/2023	11/24/2023	\$1,168.35	\$1,168.35

Total number of items selected for approvals/notify.
 Invoice number and tracking number comes with a hyperlink, clicking the hyperlink will direct you to the Invoice and Shipment details page, respectively.
 Details of the selected invoices/ shipments in a tabulated format.

Select users table provides the list of all the users who has access to the selected account. You can select the users, from whom you want to request approval for the charges or to whom you wish to notify about the charges.

Note: You cannot request approval from View only user.

Select users

Select the users that you would like to notify of these charges or request approval from. You will be able to add additional comments about these items once you choose to notify or request. Note: You cannot request approval from view only users.

Users 4

1 Selected: NOTIFY APPROVE APPROVE & NOTIFY

	FIRST NAME	LAST NAME	EMAIL	ROLE
<input checked="" type="checkbox"/>	Unnati	Varur	CBS_Test_	ADMIN
<input type="checkbox"/>	Maddi	Venakat	PuneFedex_	STANDARD
<input type="checkbox"/>	Notify	Chinna	nagaraju.chinna	STANDARD
<input type="checkbox"/>	Approve	Phis	punefedexi	VIEWONLY

Annotations:

- Total number of users who have access to the account.
- Once the checkbox of admin or standard users is selected these three options will be displayed. For view only user, clicking checkbox will only display Notify option.
- Clicking the three dots of admin or standard users will display these three options. For view only user, clicking three dots will only display Notify option.
- List of all the users having access to the account along with their first name, last name, email, and their current role information.

In the above table, clicking Notify, Approve, or Approve/Notify will perform the below functions:

Action	Response
Notify	An email notification will be sent to the selected user notifying them about the charges of the selected invoice(s)/shipment(s). This will serve as a request for approval.
Approve	Approve the charges of the selected invoice(s)/shipment(s) and status will be changed to Approved. This will reflect in the Approval and comment history table in the Invoice details page.
Approve/Notify	Approve the charges of the selected invoice(s)/shipment(s) and status will be changed to Approved and also an email notification will be sent to the selected user notifying them about the charges. This will also reflect in the Approval and comment history table in the Invoice details page.

After clicking any of the three options explained above, you will be directed to the below window.

Do you want to add additional comments?

Your notification or request will be sent to the selected users by email. If you'd like, you can send additional comments along with that email.

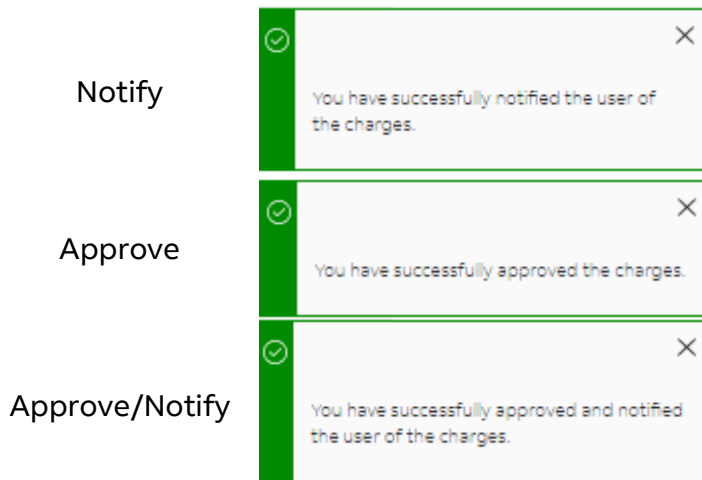
The comments will also be saved in the **Approval and Comments History** section of the **Invoice Details** page for your selected items.

Comments

0/250 character

SUBMIT

If you wish to add any comments regarding the charges, you can add (this is an optional step) and click **Submit**, and you will receive the below success message



You can view the approved, notified, and approved/notified entries in the Approval and comments history section of the Invoice details page.

DATE	NAME	TYPE	COMMENTS	NOTIFICATION TYPE	ACTION
2024-01-24	Unnati Varur	INVOICE		NOTIFY_ONLY	SENT
2024-01-24	Unnati Varur	INVOICE		NOTIFY_APPROVE	CANCEL_APPROVAL
2024-01-24	Unnati Varur	INVOICE		NOTIFY_ONLY	SENT
2024-01-24	Unnati Varur	INVOICE	This is an optional	APPROVE_ONLY	CANCEL_APPROVAL
2024-01-24	Unnati Varur	INVOICE		APPROVE_ONLY	CANCEL_APPROVAL

Add comments text box allows you to add any comments about the charges. This is an optional step. The comments should not exceed 250 characters.

Add comments only

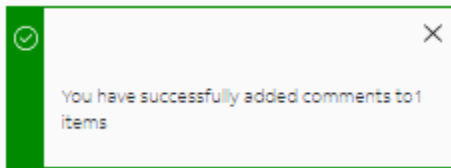
Any comments that you add here will be saved in the Approval and comment history section of the Invoice details or Shipment details page. These comments will not be sent to any users.

This step is optional

21/250 character

ADD COMMENTS

After adding the comments in the text box, click **Add comments**, and the below success message will be displayed.



The added comments will be displayed in the Approval and comments history table of the Invoice details page.

Historical Reference					
Approval and comments history					
DATE	NAME	TYPE	COMMENTS	NOTIFICATION TYPE	ACTION
2024-01-24	Unnati Varur	INVOICE	This step is optional	COMMENTS_ONLY	

15.3. Cancel approvals

The approval and comments history table provides details on the date on which the approvals are created, name of the user, type of the item (invoice/shipment), comments (If any), notification type, and action column.

Historical Reference					
Approval and comments history					
DATE	NAME	TYPE	COMMENTS	NOTIFICATION TYPE	ACTION
2024-01-24	Unnati Varur	INVOICE		NOTIFY_ONLY	SENT
2024-01-24	Unnati Varur	INVOICE		NOTIFY_APPROVE	CANCEL_APPROVAL
2024-01-24	Unnati Varur	INVOICE		NOTIFY_ONLY	SENT
2024-01-24	Unnati Varur	INVOICE	This is an optional	APPROVE_ONLY	CANCEL_APPROVAL
2024-01-24	Unnati Varur	INVOICE		APPROVE_ONLY	CANCEL_APPROVAL

In the action column, clicking [Cancel_Approval](#) hyperlink to view the Cancel approval page.

Cancel approval

Select items from the list for which you want to cancel the approval. You may also select users to notify of the cancellation.

Items
1

<input type="checkbox"/>	INVOICE NUMBER	TRACKING ID	ACCOUNT	INVOICE DATE	DUE DATE	ORIGINAL CHARGES	BALANCE DUE
<input checked="" type="checkbox"/>	9-600-76120		2194-9346-0	11/09/2023	11/24/2023	\$1,233.02	\$1,233.02

Select users

Select the users that you would like to notify of this cancellation:

Users
1

<input type="checkbox"/>	FIRST NAME	LAST NAME	EMAIL	ROLE
<input type="checkbox"/>	Deepthi	Vilasagaram	CBS_Test_	ADMIN

Your comments

Any comments that you add here will be saved in the Approval and comment history section of the Invoice details or Shipment details page. These comments will not be sent to any users.

0/100 characters

[BACK](#)
[CANCEL APPROVAL](#)
[CANCEL & NOTIFY](#)

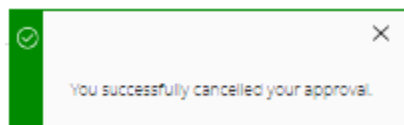
Similar to Approve invoices and notify users page, Cancel approval page also has Invoices/Shipments table, Select users table, and Comments text box.

In the Invoice/Shipments table, you can select only the invoice(s)/shipment(s) for which you need to cancel the approval.

In the Select users table, select the users you wish to notify of the cancelled approval.

And in the Comments text box, enter your comments (if any). Once the preferences are made, if you wish to cancel the approval without notifying other users click **Cancel approval** or if you wish to cancel the approval and notify the selected user(s) click **Cancel & Notify**.

Once the approval is cancelled, the below success message will be displayed, and you will be directed to the Invoice details page.



In the Invoice details page, the approval and comments history table will be updated with the cancelled status in the action column.



Historical Reference

Approval and comments history



DATE	NAME	TYPE	COMMENTS	NOTIFICATION TYPE	ACTION
2024-01-24	Unnati Varur	INVOICE		NOTIFY_ONLY	SENT
2024-01-24	Unnati Varur	INVOICE		NOTIFY_APPROVE	CANCEL_APPROVAL
2024-01-24	Unnati Varur	INVOICE		NOTIFY_ONLY	SENT
2024-01-24	Unnati Varur	INVOICE	This is an optional	APPROVE_ONLY	CANCELLED
2024-01-24	Unnati Varur	INVOICE		APPROVE_ONLY	CANCELLED
2024-01-24	Unnati Varur	INVOICE		CANCEL_APPROVAL	CANCELLED
2024-01-24	Unnati Varur	INVOICE		CANCEL_APPROVAL	CANCELLED

SECTION - 16

16. Disputes

If you have concerns about any of the charges applied to the account prior to payment, you can raise a dispute online.

Disputes can be raised for shipments, duty/tax shipments, late fees, and multi package shipments.

Note: Only Admin and standard users will be able to raise disputes. Also, the items which are already in dispute, pay cart, or submitted for payment cannot be disputed.

16.1. Dispute shipments

To raise a dispute at shipment level, follow the below mentioned steps:

Step 1. In the left navigation menu, click **Invoices** or in the Summary page, click **View all invoices**.

Step 2. Click the invoice number from which you wish to select the tracking ID.

Step 3. In the Invoice details page, under Shipments module, click the tracking ID for which you wish to raise dispute.

Step 4. In the Shipment details page, click **Dispute shipment**.

The screenshot displays the 'SHIPMENT DETAILS' page for Tracking ID 7799242618. The page is titled 'SHIPMENT DETAILS' and includes a note 'Amounts are shown in USD'. Below the title, the tracking ID is displayed. A navigation bar shows 'Shipment 12 of 12'. The main content is divided into two columns: 'BILLING INFORMATION' and 'TRANSACTION DETAILS'. The 'BILLING INFORMATION' column lists: Tracking ID number (7799242618), Invoice number (4-345-6745), Account number (1234-0000-3), Invoice date (09/30/2022), Total billed (\$254.00), Tracking ID balance due (\$0.00), and Status (Paid CC). The 'TRANSACTION DETAILS' column lists: Sender information (Tank Design, 14 Tyler Street, Somerville, MA 02143, US) and Recipient information (Anthony Sparks, 74 Hargrove Road, Banks Creek, Queensland, 4306, AUS). At the bottom, there are four buttons: 'VIEW SIGNATURE PROOF OF DELIVERY', 'CUSTOMS DOCUMENTS', 'DISPUTE SHIPMENT', and 'ADD TO CART'.

BILLING INFORMATION		TRANSACTION DETAILS	
Tracking ID number	7799242618	Sender information	
Invoice number	4-345-6745	Tank Design	
Account number	1234-0000-3	14 Tyler Street	
Invoice date	09/30/2022	Somerville, MA 02143	
Total billed	\$254.00	US	
Tracking ID balance due	\$0.00	Recipient information	
Status	Paid CC	Anthony Sparks	
		74 Hargrove Road	
		Banks Creek	
		Queensland, 4306	
		AUS	

Step 5. In the Dispute shipment page, you can view the tracking ID, account number, invoice number, total original charges, and balance due amount.

Dispute shipment

Enter your shipment dispute details.

DISPUTE INFORMATION

Tracking ID	7799242618
Account number	1234-0000-3
Invoice number	4-345-6745
Total original charges	\$254.00
Balance due	\$254.00

Dispute amount*

254.00

Dispute type*

Select

- Step 6.** In the Dispute amount text box, the balance due amount will be prepopulated. You can still edit the dispute amount, but the dispute amount should be less than or equal to the balance due amount.
- Step 7.** Select the type of dispute from the dispute type drop-down. For shipment level dispute, there will be four types of disputes: Incorrect Charge, Service Failure, Payment Previously Sent, Incorrect Account.
- Step 8.** The Dispute reason drop-down will be enabled, and based on the selected dispute type, click the Dispute reason drop-down and select the appropriate reason for dispute.
- Note:** The Dispute reason list will be updated based on the selected dispute type.

Dispute shipment

Enter your shipment dispute details.

DISPUTE INFORMATION

Tracking ID	7799242618
Account number	1234-0000-3
Invoice number	4-345-6745
Total original charges	\$254.00
Balance due	\$254.00

Dispute amount*

254.00

Dispute type*

Service failure

Dispute reason*

Delivered late

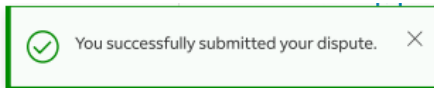
Additional dispute comments

0/250 characters

[BACK](#) [SUBMIT DISPUTE](#)

- Step 9.** If you wish to add some additional information about the dispute, add them in the additional dispute comments, once all the required information is filled, click **Submit dispute**.

Now, the Invoice will be submitted for dispute, an email notification will be sent with the dispute details, and below success message will be displayed.



Note: If the selected tracking ID is an express Duty/Tax shipment, the dispute option is replaced with research option.

16.2. Dispute late fees

To raise a dispute for the late fee amount, follow the below mentioned steps:

- Step 1.** In the left navigation menu, click **Invoices** or in the Summary page, click **View all invoices**.
- Step 2.** Click the invoice number for which you wish to raise a dispute for late fees.
- Step 3.** In the Invoice details page, under Payments and charges, in the miscellaneous charges table, you can view the late fee charges.

The screenshot shows the 'Payments and charges' section of an invoice. It includes a 'Miscellaneous charges' table with columns for Description, Qty, Account, ZIP Code, Conversion Rate, Date, Other Handling Charges, and Total Charges. Below this is an 'Other miscellaneous charges' table with columns for Miscellaneous Items, Description, Invoice Date, and Amount. The 'Late fee charge' row is highlighted.

MISCELLANEOUS ITEMS	DESCRIPTION	QTY	ACCOUNT	ZIP CODE	CONVERSION RATE	DATE	OTHER HANDLING CHARGES	TOTAL CHARGES
Weekly service chg (packages)	Transportation charge	1	-	-	-	01/16/2022	\$0.50	\$37.00
Transportation charge (packages)	Automated pickup wk fee	1	-	-	-	01/16/2022	\$0.00	\$16.00
Weekly service chg (packages)	Transportation charge	1	-	-	-	01/16/2022	\$0.50	\$18.50
Weekly service chg (packages)	Transportation charge	1	-	-	-	01/16/2022	\$0.50	\$37.00

MISCELLANEOUS ITEMS	DESCRIPTION	INVOICE DATE	AMOUNT
Late fee charge	INVOICE 7-586-9740	01/10/2022	\$36.50

- Step 4.** In the late fee charges row, click the three dots **:** on the left side and you can view the Dispute option. Click **Dispute**.
- Step 5.** The Dispute late fee page you can view account number, invoice number, late fee invoice number, and late fee charge. The Dispute type will be auto populated as late fee charge in a read-only mode.

Dispute late fee

Enter your dispute details.

DISPUTE INFORMATION

Account number	1234-0000-3
Invoice number	4-345-6745
Late fee invoice number	7-596-97640
Late fee charge	\$38.58

Dispute type*

Late fee charge

BACK
SUBMIT DISPUTE

Step 6. After reviewing the dispute information, click **Submit dispute**.

After reviewing the dispute information, for a valid dispute you will receive upto \$250 in your account number. This applies only to disputes submitted for the first time. If your account has any parent child relationship with another account, this amount will be credited as a one-time payment to the parent account.

After successful credit of your one-time payment, you will receive the following information in a message format, “We have issued a one-time late Fee forgiveness credit to your account. Future Late Fee disputes will be denied.”

All the future late fee disputes will be automatically denied with the following information in a message format, “We regret to inform you that your request for a billing adjustment has been denied. This charge is not eligible for a credit.”

16.3. Dispute Duty/Tax (D/T) shipments

You can dispute D/T shipments only at the shipment level. To raise a dispute for D/T shipments, follow the below mentioned steps:

- Step 1.** In the left navigation menu, click **Invoices** or in the Summary page, click **View all invoices**.
- Step 2.** Click the invoice number from which you want to select the D/T shipment.
- Step 3.** In the Invoice details page, under Shipments module, click the tracking ID of the D/T shipment for which you wish to raise dispute.
- Step 4.** In the Shipment details page, click **Dispute charges**.

SHIPMENT DETAILS Amounts are shown in USD

Tracking ID 7799242618

← Shipment 12 of 12 →

BILLING INFORMATION		TRANSACTION DETAILS
Tracking ID number	7799242618	Sender information
Invoice number	4-345-6745	Tank Design
Account number	1234-0000-3	14 Tyler Street
Invoice date	09/30/2022	Somerville, MA 02143
Total billed	\$1,254.00	US
Tracking ID balance due	\$0.00	Recipient information
Status	Paid CC	Anthony Sparks
		1 Rue des Carrieres
		Quebec City, QC, G1R 4P5
		Canada

[VIEW SIGNATURE PROOF OF DELIVERY](#)
[CUSTOMS DOCUMENTS](#)
[DISPUTE CHARGES](#)
[ADD TO CART](#)

Step 5. In the Dispute charges page, you can view tracking ID, account number, invoice number, ship date, entry number, and total duties, taxes customs, and other fees information.

Dispute charges

Enter your dispute details.

SHIPMENT INFORMATION

Tracking ID	7799242618
Account number	1234-0000-3
Invoice number	4-345-6745
Ship date	8/22/2022
Entry number	55514610015
Total duties, taxes, customs, and other fees	\$39.17

Dispute type*

Select ▼

Step 6. In the Dispute type drop-down, there are two types of dispute available: Duty and Tax Rebill Notification and Clearance Charges Dispute.

Selecting either Duty and Tax rebill notification or Clearance charges dispute will again directs you to their respective pages for additional information, required to complete submitting the disputes.

Duty and Tax Rebill dispute type:

If you select Duty and tax dispute type from the drop-down, then the below additional fields will be displayed.

Dispute charges

Enter your dispute details.

DISPUTE INFORMATION

Tracking ID: 7799242618
 Account number: 1234-0000-3
 Invoice number: 4-345-6745
 Ship date: 8/22/2022
 Entry number: 55514610015
 Total duties, taxes, customs, and other fees: \$39.17

Dispute information

Dispute type*

Relationship to the shipment*

Origin country/territory*

Destination country/territory*

Amount of rebill*

Reason for rebill*

Rebill comments

0/250 characters

Contact information
 We'll use this information to contact you if we have additional questions about your dispute.

Contact name*

Company name*

Country/territory*

Address*

Apt/suite

City*

State/Province*

Zip/postal code*

Contact phone*

Email address*

Fax number

Once you submit this dispute, it will be sent to a specialist for review. In 48 hours, you can then check on the status of your dispute.

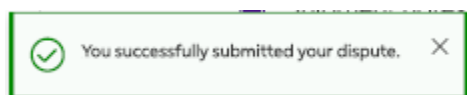
[BACK](#) [SUBMIT DISPUTE](#)

- ▶ **Dispute type:** Duty and tax rebill notification.
- ▶ **Relationship to the shipment:** Select Shipper, Consignee, or Third party from the drop-down.
- ▶ **Origin country/Territory:** US (Pre-populated)
- ▶ **Destination country/Territory:** CA (Pre-populated)
- ▶ **Amount of rebill:** Total duties, taxes, customs, and other fees amount (Pre-populated)
- ▶ **Reason for rebill:** Select the reason from the drop-down menu: Recipient is responsible for charges, Shipper is responsible for charges, Shipment Unknown or Third party is responsible for charges.
- ▶ **Rebill comments:** Text input field which allows you to add any additional information.

▶ **Contact information:** Provide your contact information so FedEx can contact you if they need any additional information about the dispute. The contact information includes: Contact name, Company name, Country/Territory, Address, Apartment/Suite, City, State/Province, Zip/Postal code, Contact phone, Email address, and Fax number.

Once all the required information is filled out, click **Submit dispute**.

Now, the selected shipment will be submitted for dispute, an email notification will be sent with the dispute details, and below success message will be displayed.



Clearance charges dispute type:

If you select clearance charges from the dispute type drop-down, then the below additional fields will be displayed.

Dispute charges
Enter your dispute details.

DISPUTE INFORMATION

Tracking ID: 7799242618
Account number: 1234-0000-3
Invoice number: 4-345-6745
Ship date: 8/22/2022
Entry number: 55514610015
Total duties, taxes, customs, and other fees: \$39.17

Dispute information

Dispute type*
Clearance charges dispute

Relationship to the shipment*
Select

Shipment sent from (origin country/territory)*
HK

Shipment sent to (destination country/territory)*
US

Reason for research request*
Select

What is wrong with the entry?

6/250 characters

What information should the entry reflect?

6/250 characters

Contact information
We'll use this information to contact you if we have additional questions about your dispute.

Contact name*

Company name*

Country/territory*
Select

Address*

Apt/suite

City*

State/Province*
Select

Zip/postal code*
00000

Contact phone*

Email address*

Fax number

Once you submit this dispute, it will be sent to a specialist for review. In 48 hours, you can then check on the status of your dispute.

- ▶ **Dispute type:** Duty and tax rebill notification.
- ▶ **Relationship to the shipment:** Select Shipper, Consignee, or Third party from the drop-down.
- ▶ **Shipment sent from (origin country/territory):** HK (Pre-populated)
- ▶ **Shipment sent to (destination country/territory):** US (Pre-populated)
- ▶ **Reason for research request:** Select the relevant one from the following options: Aircraft Parts, Antiques/Artwork, Classification (Harmonized Tariff Code), Currency Conversion Error, Declared Value Error, GSP Eligible, Merchandise Processing Fee, NAFTA, Personal/Gift/Religious Items, Samples, VAT (Value Added Tax), Warranty/Repair/Return Shipment, and Other.
- ▶ **What is wrong with the entry?:** Text input field for additional information.
- ▶ **What information should the entry reflect?:** Text input field for additional information.
- ▶ **Contact information:** Provide your contact information so that, FedEx can contact you if they need any additional information about the dispute. The contact information includes: Contact name, Company name, Country/Territory, Address, Apartment /Suite, City, State/Province, Zip/Postal code, Contact phone, Email address, and Fax number.

Once all the required information is filled out, click **Submit dispute**.

Now, the selected shipment will be submitted for dispute, an email notification will be sent with the dispute details, and below success message will be displayed.

✔
You successfully submitted your dispute.
✕

16.4. Dispute Multi Package Shipments (MPS)

To raise a dispute at package level, follow the below mentioned steps:

- Step 1.** In the left navigation menu, click **Invoices** or in the Summary page, click **View all invoices**.
- Step 2.** Click the invoice number from which you wish to select the tracking ID.
- Step 3.** In the Invoice details page, scroll down through the Invoice details and under Shipments module, click the tracking ID from which you wish to select MPS shipments.
- Step 4.** And in the Shipment details page, scroll down through the Shipment details and under Shipments module, click **MPS details**.

SHIPMENT DETAILS Amounts are shown in USD

Tracking ID 7799242618

← Shipment 1 of 7 →

BILLING INFORMATION	TRANSACTION DETAILS
Tracking ID number: 7799242618 (Master) ↓ 1 of 7 shipments	Sender information Tank Design 14 Tyler Street Somerville, MA 02143 US
Product group: MPS	Recipient information Anthony Sparks 74 Hargrave Road Banks Creek Queensland, 4306 AUS
Master tracking ID number: 7799242780	
Invoice number: 4-345-6745	
Account number: 6835-9349-4	
Invoice date: 09/30/2021	
Total billed: \$159.46	
Tracking ID balance due: \$0.00	
Status: Paid CC	

[VIEW SIGNATURE PROOF OF DELIVERY](#) [CUSTOMS DOCUMENTS](#) [ADD TO CART](#)

Shipments

Shipment details ⌵

MPS details ⌵

- Step 5.** Under MPS details, select three dots on the left side of respective row and click **Dispute**.

MPS details ⌵

	TRACKING ID	DIMENSIONS	ACTUAL WEIGHT	ACTUAL WEIGHT UNIT OF MEASURE	RATED WEIGHT	RATED WEIGHT UNIT OF MEASURE	CHARGES
⋮	> 7799242618 (Master)	6"x6"x6"	15.5	LBS	17.0	LBS	\$ 5.27
⋮	> 284139421077	6"x6"x6"	15.5	LBS	20.0	LBS	\$ 567.50
⋮	> 774889606984	6"x6"x6"	15.5	LBS	20.0	LBS	\$ 33.89
⋮	⌵ 698477488960	6"x6"x6"	15.5	LBS	17.0	LBS	\$ 65.55

Charges

Additional handling - DIM	\$ 13.59
Dry ice	\$ 5.55
Dangerous goods	\$ 46.50
TOTAL	\$ 65.55

[DISPUTE](#)

⋮	> 889677406984	6"x6"x6"	15.5	LBS	16.0	LBS	\$ 3.50
⋮	> 139428421077	6"x6"x6"	15.5	LBS	17.0	LBS	\$ 77.19
⋮	> 498720964916	6"x6"x6"	15.5	LBS	17.0	LBS	\$ 142.21

Step 6. In the Dispute shipment page, you can view tracking ID, account number, invoice number, total original charges, and balance due amount.

Dispute shipment

Enter your shipment dispute details.

DISPUTE INFORMATION

Tracking ID	7799242618
Account number	1234-0000-3
Invoice number	4-345-6745
Total original charges	\$254.00
Balance due	\$254.00

Dispute amount*

Dispute type*

Step 7. In the Dispute amount text box, the balance due amount will be pre-populated. You can still edit the dispute amount, but the dispute amount should be less than or equal to the balance due amount.

Step 8. Select the type of dispute from the dispute type drop-down. For shipment level dispute, there will be four types of disputes: Incorrect Charge, Service Failure, Payment Previously Sent, Incorrect Account.

Step 9. The Dispute reason drop-down will be enabled, and based on the selected dispute type, click the Dispute reason drop-down and select the appropriate reason for dispute.

Note: The Dispute reason list will be updated based on the selected dispute type.

Dispute shipment

Enter your shipment dispute details.

DISPUTE INFORMATION

Tracking ID	7799242618
Account number	1234-0000-3
Invoice number	4-345-6745
Total original charges	\$254.00
Balance due	\$254.00

Dispute amount*

Dispute type*

Dispute reason*

Correct dimensions (length x width x height)*

[BACK](#) [SUBMIT DISPUTE](#)

Note: If the Dispute reason is selected as Dimensions, there is one more field available for adding the dimensions of the package selected for dispute.

Step 10. Once all the required information is filled, click **Submit dispute**.

Now, the MPS shipment is submitted for dispute.

16.5. View dispute items

There are several ways to view the items which are disputed.

1. In the Summary page, click Dispute tile and the Invoice table displays the list of all the items currently in Dispute.

The Summary page displays the account number 1234-0000-3 and a + ADD ACCOUNT button. It shows three summary tiles: ACCOUNT BALANCE of \$254.00, DISPUTED of \$200.00, and PAST DUE of \$100.00. A prominent orange button labeled VIEW INVOICES is centered below the tiles.

The Invoices page displays the account number 1234-0000-3 and a + ADD ACCOUNT button. It shows the same three summary tiles as the Summary page. Below the tiles is a table with the following data:

INVOICE NUMBER	INVOICE DATE	INVOICE STATUS	PDF STATUS	DUE DATE	CURRENT BALANCE	ORIGINAL AMOUNT DUE	PAYMENT STATUS	PAID	CI
1-345-5323	02/10/2022	Open – In dispute	Available	02/28/2022	\$ 50.00	\$ 50.00	-	\$0.00	U
1-422-1432	03/10/2022	Open – In dispute	Available	03/31/2022	\$ 50.00	\$ 50.00	-	\$0.00	U
4-131-4224	04/10/2022	Open – In dispute	Available	04/30/2022	\$ 25.00	\$ 25.00	-	\$0.00	U
2-432-1333	05/10/2022	Open – In dispute	Available	05/31/2022	\$75.00	\$75.00	-	\$0.00	U

2. In the Invoice table, all the invoices currently in Dispute will be updated with the status of Dispute along with their original status (i.e., example: Open-in-dispute).
3. If the dispute is created at the invoice level, the status of the invoice is provided with the hyperlink.

Invoices

Account number
1234-0000-3

+ ADD ACCOUNT

Amounts are shown in USD

\$254.00 ACCOUNT BALANCE

\$254.00 DISPUTED

\$100.00 PAST DUE

All Invoices 50

FILTERS EDIT COLUMNS VIEWS

<input type="checkbox"/>	INVOICE NUMBER	INVOICE DATE	INVOICE STATUS	PDF STATUS	DUE DATE	CURRENT BALANCE	ORIGINAL AMOUNT DUE	PAYMENT STATUS	PAID	CI
<input type="checkbox"/>	> 4-345-6745	02/10/2022	Open - In dispute	Available	02/28/2022	\$ 324.65	\$ 324.65	-	\$0.00	U.
<input type="checkbox"/>	> 1-422-1432	03/10/2022	Open	Available	03/31/2022	\$100.00	\$ 50.00	-	\$0.00	U.
<input type="checkbox"/>	> 4-131-4224	04/10/2022	Open	Available	04/30/2022	\$100.00	\$100.00	Scheduled	\$0.00	U.
<input type="checkbox"/>	> 2-432-1333	05/10/2022	Open	Available	05/31/2022	\$ 50.00	\$100.00	Pending	\$0.00	U.
<input type="checkbox"/>	> 4-234-6745	06/10/2022	Open	Pending	06/30/2022	\$ 50.00	\$ 50.00	Added to cart	\$0.00	U.
<input type="checkbox"/>	> 3-112-1867	07/10/2022	Open	Pending	07/31/2022	\$ 50.00	\$ 50.00	-	\$0.00	U.
<input type="checkbox"/>	> 8-323-6723	08/10/2022	Open	Pending	08/31/2022	\$ 50.00	\$ 50.00	-	\$0.00	U.
<input type="checkbox"/>	> 2-333-9675	09/10/2022	Open	Not supported	09/30/2022	\$ 50.00	\$ 50.00	-	\$0.00	U.
<input type="checkbox"/>	> 2-112-3277	10/10/2022	Open	Not supported	10/31/2022	\$ 54.00	\$100.00	Added to cart	\$0.00	U.
<input type="checkbox"/>	> 1-889-9908	11/10/2022	Open	Available	11/30/2022	\$ 20.00	\$100.00	Added to cart	\$0.00	U.

Clicking the Invoice status hyperlink will direct you to the Dispute Details page.

DISPUTE DETAILS

Dispute 5300684

Amounts are shown in USD

DISPUTE INFORMATION

Account number	1234-0000-3
Invoice number	1-345-5323
Tracking ID	091782759264
Dispute date	06/15/2023
Dispute type	Service failure
Dispute reason	Delivered late
Comments	-
Dispute status	Submitted
Total original charges	\$61.89
Requested amount	\$31.09
Credited	-

BACK

- Similar to invoice dispute, if the dispute is created at shipment level the dispute icon will be available in the shipments table next to the three dots. Clicking the dispute icon will direct you to the Dispute details page.

MPS details

	TRACKING ID	DIMENSIONS	ACTUAL WEIGHT	ACTUAL WEIGHT UNIT OF MEASURE	RATED WEIGHT	RATED WEIGHT UNIT OF MEASURE	CHARGES
	> 7799242618 (Master)	6"x6"x6"	15.5	LBS	17.0	LBS	\$ 5.27
Dispute	> 284139421077	6"x6"x6"	15.5	LBS	20.0	LBS	\$ 567.50
	> 774889606984	6"x6"x6"	15.5	LBS	20.0	LBS	\$ 33.89
	> 698477488960	6"x6"x6"	15.5	LBS	17.0	LBS	\$ 65.55

Charges

Additional handling - DIM	\$ 13.50
Dry Ice	\$ 5.55
Dangerous goods	\$ 46.50
TOTAL	\$ 65.55

[DISPUTE](#)

	> 889677406984	6"x6"x6"	15.5	LBS	16.0	LBS	\$ 3.50
	> 139428421077	6"x6"x6"	15.5	LBS	17.0	LBS	\$ 77.19
	> 498720964916	6"x6"x6"	15.5	LBS	17.0	LBS	\$ 142.21

- If a shipment in the invoice is submitted for dispute, then the invoice table will only display the status of the invoice and no hyperlink will be provided at the invoice level.

Invoices

Account number
1234.0000.3

[+ ADD ACCOUNT](#)

Amounts are shown in USD

\$254.00

ACCOUNT BALANCE

\$200.00

DISPUTED

\$100.00

PAST DUE

All Invoices 50										
	INVOICE NUMBER	INVOICE DATE	INVOICE STATUS	PDF STATUS	DUE DATE	CURRENT BALANCE	ORIGINAL AMOUNT DUE	PAYMENT STATUS	PAID	CI
<input type="checkbox"/>	> 1-345-5323	02/10/2022	Open - In dispute	Available	02/28/2022	\$ 50.00	\$ 50.00	-	\$0.00	U
<input type="checkbox"/>	> 1-422-1432	03/10/2022	Open - In dispute	Available	03/31/2022	\$ 50.00	\$ 50.00	-	\$0.00	U
<input type="checkbox"/>	> 4-131-4224	04/10/2022	Open - In dispute	Available	04/30/2022	\$ 25.00	\$ 25.00	-	\$0.00	U
<input type="checkbox"/>	> 2-432-1333	05/10/2022	Open - In dispute	Available	05/31/2022	\$75.00	\$75.00	-	\$0.00	U

- Once the dispute is raised, the dispute number will be created, and this will be updated in the Transaction history section of Payments and charges module. Clicking the dispute reference number directs you to the Dispute details page.

SECTION - 17

17. Reporting

Reporting feature allows you to create and download the invoice reports and helps you meet your billing needs. Under Reporting there are three options: Create report, Download center, and Automated settings.

17.1. Create report

Create report allows you to customize report parameters, create reports, and download it for future reference.

To start creating a report, in the left navigation menu select Reporting and click **Create report**.

Create report involves two different sections: Filter your report data and Select your report columns.

Filter your report data:

To filter your report data, follow the below mentioned steps:

Step 1. In Create report page, select either **Use saved filter set** or **Apply new filters**.

- **Use saved filter set:** This option allows you to use the saved filter set from the Filter Set drop-down. All the values of that filter set will apply to the current report. [Click here](#) to know about Manage Filter Set.
- **Apply new filters:** This option allows you to create a new filter set, first select a filter set from the drop-down.

FedEx® Billing Online

CART \$0.00 USD

SUMMARY

INVOICES

MANAGE PAYMENTS

ADMINISTRATION

REPORTING

HELP

RETURN TO LEGACY

Create report

To create a report, first filter your report data, then select your report columns.

1. Filter your report data

To run a new report, start by filtering your report data. You can use a saved set of filters or apply new filters.


Use saved filter set

Apply new filters

Filter Set*

Select

Step 2. Select the Account number(s) using the checkbox.


- Step 3.** Set the date range using the calendar selector. 
- Step 4.** Select the invoice status from the status drop-down.

Saving option

Under Saving Option, there will be two scenarios:

1. Save filter set checkbox
2. Save as new and Update filter set.

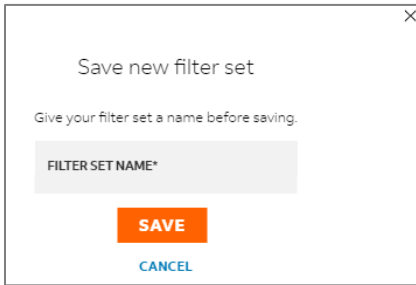
Save filter set checkbox

If you have selected Apply new filters option, Save Filter Set checkbox is displayed to save the new filter set for future use. To save, click Save filter set checkbox,  provide a name in the Filter set name text box, and click **Save Filter Set** option.

Save as new and Update filter set

Save as new and Update filter set option is displayed, if you have selected Use saved filter set option and made any modifications to the pre-populated values of that filter set, like changing the date range or adding/removing the account number(s).

If you click **Save as new** option, then you will get the below window. Enter the filter name in the filter set name text box and click **Save**.

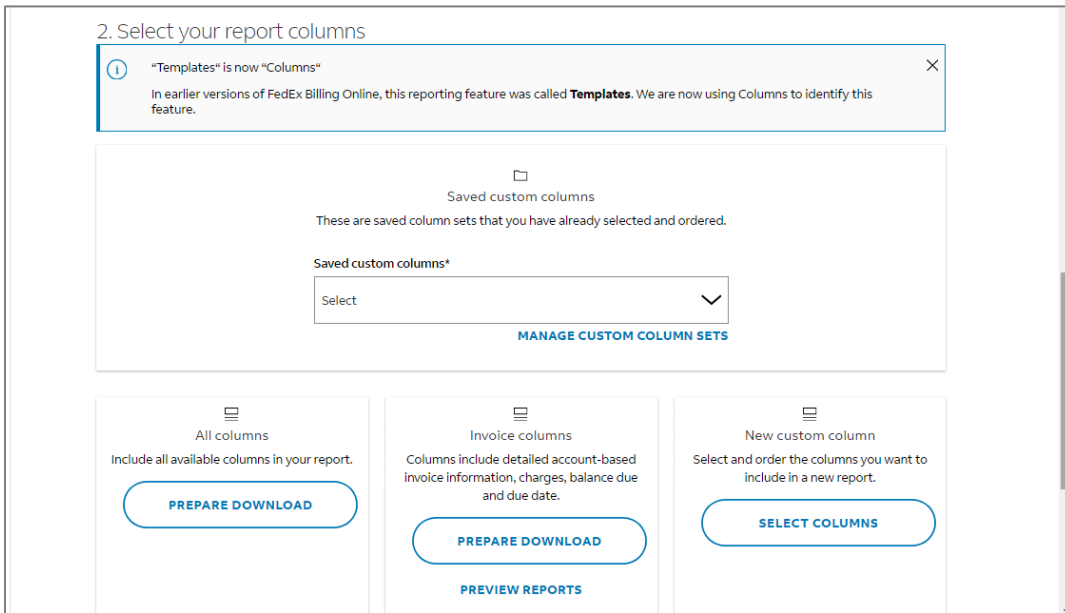


To update the existing filter set, click **Update filter set** option. The changes will be applied to the saved filter set.

Select your report columns:

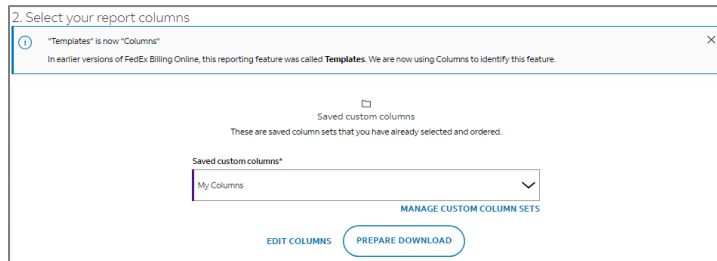
Under this section, there are four ways to select your report columns:

1. [Saved custom columns](#)
2. [All columns](#)
3. [Invoice columns](#)
4. [New Custom column](#)



1. Saved custom columns

In the saved custom columns drop-down all the custom columns which are already saved to the account are displayed.



2. Select your report columns

"Templates" is now "Columns"
In earlier versions of FedEx Billing Online, this reporting feature was called **Templates**. We are now using Columns to identify this feature.

Saved custom columns
These are saved column sets that you have already selected and ordered.

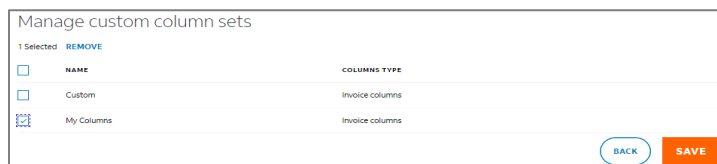
Saved custom columns*

My Columns

MANAGE CUSTOM COLUMN SETS

EDIT COLUMNS PREPARE DOWNLOAD

- **Saved Custom Columns:** Select the required saved custom column from the drop-down.
- **Manage Custom Column Sets:** Click **Manage custom column sets** link to see the saved column sets in the account. To delete the column set, select the checkbox(es), and click **Remove**.



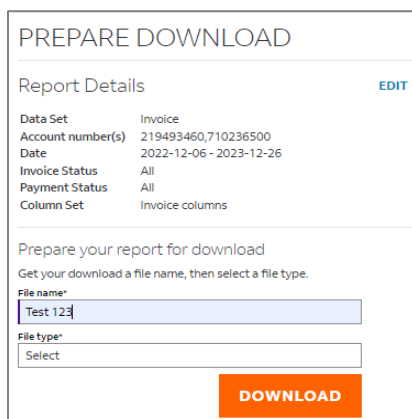
Manage custom column sets

1 Selected REMOVE

<input type="checkbox"/>	NAME	COLUMNS TYPE
<input type="checkbox"/>	Custom	Invoice columns
<input checked="" type="checkbox"/>	My Columns	Invoice columns

BACK SAVE

- **Edit columns:** To further modify the columns in the report. [Click here](#) to know more about editing the columns in the report.
- **Prepare Download:** To download the report, follow the below steps:
 - Step 1.** Click **Prepare download** and it will direct you to the Prepare download page.
 - Step 2.** Enter file name in file name text box.
 - Step 3.** Select file type using the file type drop-down.
 - Step 4.** Click **Download**, and you will be directed to the Download center page.



PREPARE DOWNLOAD

Report Details [EDIT](#)

Data Set Invoice
Account number(s) 219493460,710236500
Date 2022-12-06 - 2023-12-26
Invoice Status All
Payment Status All
Column Set Invoice columns

Prepare your report for download
Get your download a file name, then select a file type.

File name*
Test 123

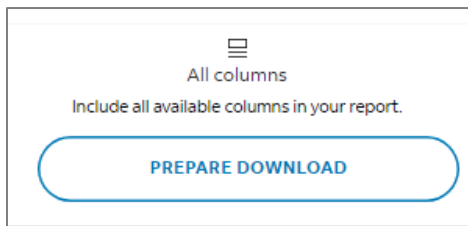
File type*
Select

DOWNLOAD

In the Download center page, if the file status is completed, click the file name to download the report.

2. All columns

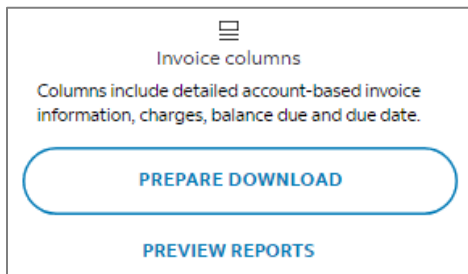
This option automatically includes all the columns available in the system into your report.



Click **Prepare download** (follow the steps mentioned in the referred section), and the report will be available in the download center.

3. Invoice columns

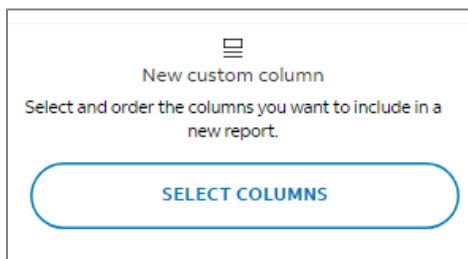
Invoice columns includes the detailed account-level information such as charges, balance due, due date etc., in the report.



- **Prepare download:** Click **Prepare download** (follow the steps mentioned in the referred section) and the report will be available in the download center.
- **Preview reports:** Click **Preview reports** to preview the columns available in the invoice columns.

4. New custom column

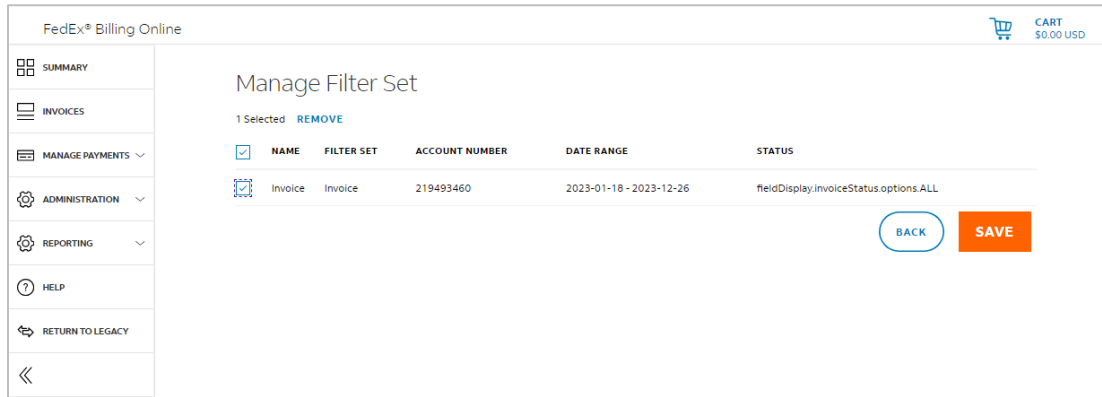
New custom column helps you to select the columns for your report.



- Click **Select columns**, and you will be directed to Select columns page.
- Select column page is same as Edit column page. Both the pages allow you to add/remove the columns from the report. To know more about this feature, click [Edit columns/New Custom Columns](#).

Manage filter set

In Manage Filter Set page, all the saved filter sets will be displayed, along with their details like name of the filter, date range, account number, filter set, and status.



To remove any saved filter, click the checkbox, and remove option will be enabled. Click **Remove**. To save the changes made in the Manage filter set page, click **Save**.

Edit columns/ New custom column:

Edit columns or New custom column feature functionalities work in a similar way.

Edit columns: Edit columns option is enabled only when the saved column set is selected from the drop-down. Edit Columns allows you to add/remove the columns from the saved custom column set.

New custom column: This feature allows you to create a new column set. Click **Select Columns** under New custom column to customize the report column, and you can also save it for future reports.


There are two sections in the Edit columns/Select columns page:

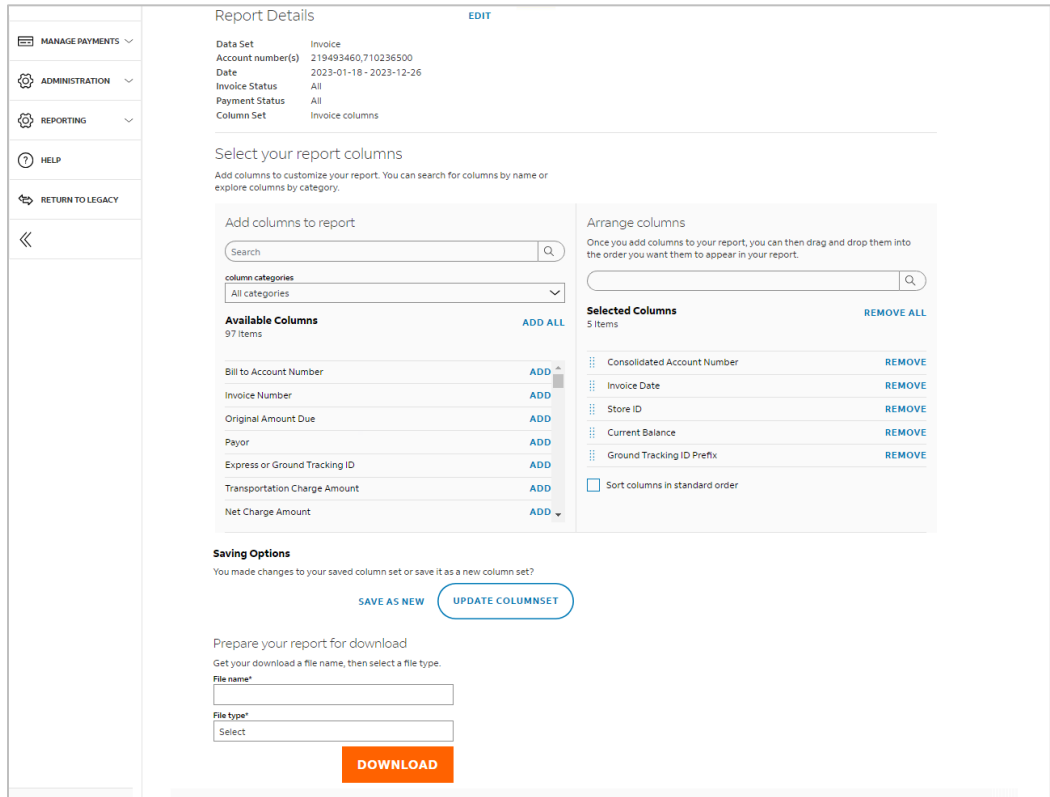
Available columns: This section displays the list of all the available columns to create a report.

- **Search:** Use the search text box to find the required column.
- **Category:** Select the required category to narrow down the column list.
- **Add:** Click **Add** to include the column to your report one by one. The respective column will immediately display in the Selected column section.
- **Add all:** Click **Add all** to include all the available columns to the report.

Selected columns: This section lists all the existing columns selected for the report.

- **Remove:** To remove the respective column from the report, click **Remove**.

- **Remove all:** To remove all the selected columns from the list, click **Remove all**.
- **Sort Columns in standard Order:** To list the selected columns in a standard order, click Sort columns in standard order checkbox. 



The screenshot shows the 'Report Details' page with the following sections:

- Report Details:** Data Set: Invoice, Account number(s): 219493460,710236500, Date: 2023-01-18 - 2023-12-26, Invoice Status: All, Payment Status: All, Column Set: Invoice columns.
- Select your report columns:** Add columns to customize your report. You can search for columns by name or explore columns by category.
- Add columns to report:** Search bar, column categories dropdown (All categories), Available Columns (97 items) with 'ADD ALL' button.
- Available Columns:** List of columns with 'ADD' buttons: Bill to Account Number, Invoice Number, Original Amount Due, Payor, Express or Ground Tracking ID, Transportation Charge Amount, Net Charge Amount.
- Arrange columns:** Once you add columns to your report, you can then drag and drop them into the order you want them to appear in your report. Selected Columns (5 items) with 'REMOVE ALL' button.
- Selected Columns:** List of columns with 'REMOVE' buttons: Consolidated Account Number, Invoice Date, Store ID, Current Balance, Ground Tracking ID Prefix.
- Sort columns in standard order:** checkbox.
- Saving Options:** You made changes to your saved column set or save it as a new column set? Buttons: SAVE AS NEW, UPDATE COLUMNSET.
- Prepare your report for download:** Get your download a file name, then select a file type. Fields: File name*, File type*. Button: DOWNLOAD.

Edit column page

When you add/remove the columns to the saved custom column, Save as new and Update column set options will be enabled.

Save as New: If you wish to add the selected columns as a new column set, click **Save as new** option, enter the name of the column set, and click **Save**.

Update Column Set: To update the existing column set, click **Update column set**.

Select columns page

When you add columns in the Select columns page, Save as new column set option will be enabled. To save the selected column set for future use, click **Save as new column set**, enter the name of the column set, and click **Save**.

After selecting the required columns for the report, to prepare your report for download, enter a file name, select the file type from the drop-down, and click **Download**.

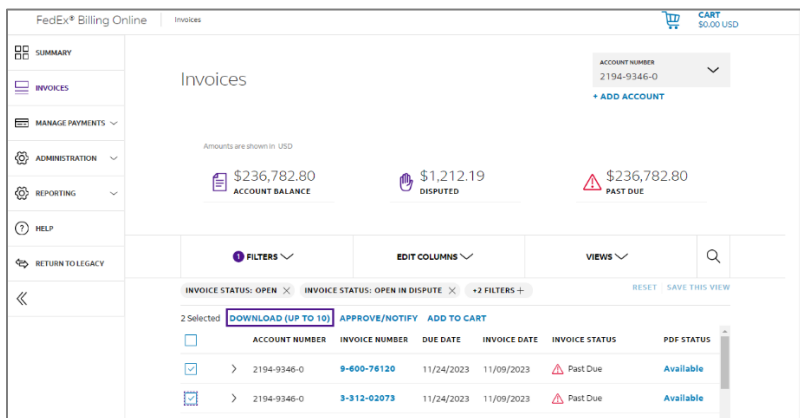
Your report will be downloaded and will be available in the Download center page.

17.2. Download center

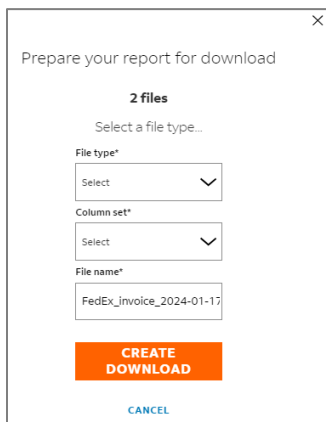
To download the invoice, follow the below mentioned steps:

Step 1. In the invoice table, select the checkbox(es) for which you wish to download the invoices.

NOTE: You can download up to ten invoices at a time.



Step 2. Click **Download**, and it will direct you to the Prepare your report for download page.



Step 3. There are five different file types available: PDF, Excel, CSV, Txt, XML. Select the required file type from the drop-down.

a) If you select file type as PDF, you will have below two options:

- i. **Print: Create one PDF of all your selected invoices** – A single PDF will be created with all the selected invoices.
 - ii. **Download/Save: Create a zip file containing individual PDFs for your selected invoices**- A zip file will be created containing a group of PDFs which includes individual invoices in it.
- Note:** By default, print option is selected. These options will be displayed only when PDF file type is selected.


- b) If you select file type as **CSV/ Excel/ Txt/ XML**, column set option will be available. Select the required column set from the drop-down, the drop-down displays the FedEx preset columns (invoice columns, all columns), and the saved column sets for the account.

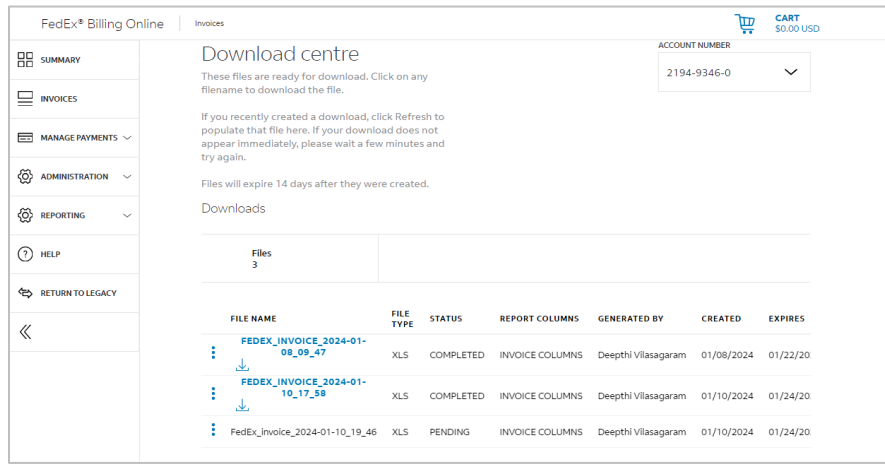
Note: A single file will be downloaded with all the invoices (Zip file cannot be created) when you select the file type as CSV/ Excel/ Txt/ XML.

Step 4. The file name will be pre-populated. You can modify it if required, but the file name should not exceed more than 30 characters.

Step 5. Click **Create Download**, and it will direct you to the Download Center page.

Step 6. The Download Center page displays the list of all the files which are downloaded. Here, you can perform the following actions:

- a) Select the account number from the account number drop-down, for which you want to view the downloaded report.
- b) In the table, click file name to download the report.
- c) Click Refresh button at the bottom, to load the latest results in the table.
- d) Click three dots  in the left side of the row and click **Delete file** to delete the downloaded report.



17.3. Automated settings

Automated settings enable you to automatically download any new invoices once it is created.

Automated settings

Turn on automated settings to streamline your billing work flow

Autodownloads

FedEx Billing Online can automatically generate a report of your invoiced data each time a new invoice is created. Once generated, it will be available in the **Download center**.

Autodownloads

Column set*

File type*

Note: if you do not select a column set, all column will be included in your report

SAVE SETTINGS

→ If the toggle bar is Off the Auto download feature will be disabled and if the toggle bar is On the Auto download feature will be enabled.

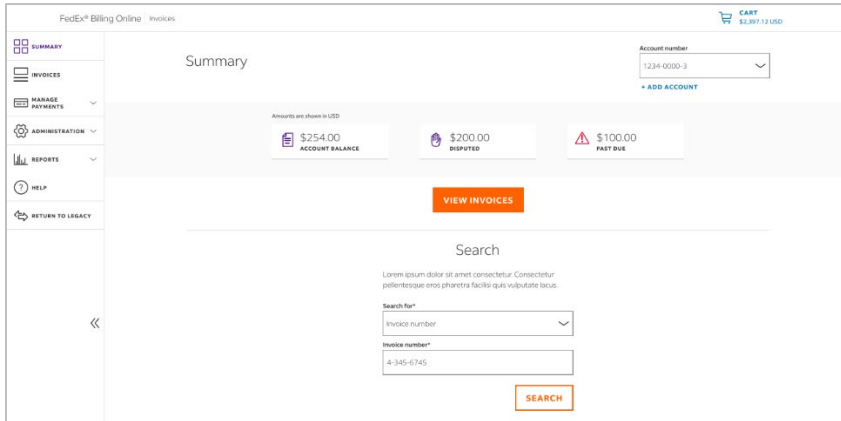
→ If the Auto downloads bar is toggled on, then you will be provided with Column set and Filter type drop-down option. Filter type drop-down is a mandatory field. If no option is selected from column set option, then by default, all the columns will be included in the report.

→ Once the necessary changes are made in the Automated settings page, click **Save settings**.

SECTION - 18

18. Quick search

Quick search feature allows you to search for any specific payment type and retrieve its details based on the different criteria like Invoice number, Tracking ID, Transaction ID, etc., in the Summary page.



To search for any specific payment type using the quick search, follow the below mentioned steps:

- Step 1.** Select the required criteria from the Search for drop-down.
- Step 2.** Enter the valid value in the text box. For example: If you have selected Invoice number from Search for drop-down, then you have to enter valid invoice number in the text box.
- Step 3.** Click **Search**.

Based on the criteria selected, you will be either directed to Search results page or Details page as shown in the below table.

Search for	Textbox	End result
Invoice number	Enter the specific invoice number	Redirect to Invoice details page
Invoice PDF	Enter the specific invoice number	Invoice PDF will be downloaded
Tracking ID/ Transaction ID	Enter the tracking/ transaction ID.	Redirect to Shipment details page
Payment reference number	Enter the Payment reference number	Redirect to Payment details page
Express reference number	Enter the Express Reference Number	Redirect to Invoice or Shipment details page
Reference #2	Enter the Reference #2	Search results
Reference #3	Enter the Reference #3	Search results

Express department number	Enter the Express department number	Search Results
Ground PO number	Enter the Ground PO number	Search results
Ground reference number	Enter the Ground reference number	Search results
Ground dept number	Enter the Ground dept number	Search Results
Dispute reference number	Enter the Dispute reference number	Redirect to Dispute details page
Cost allocation	Enter the Cost allocation	Search Results

Search results

Search results page displays when the search has more than one result. In the Search results page, you can view the below information:

- **Search Criteria:** Displays the criteria you selected, and the value entered in the textbox.
- **Edit search criteria:** Allows you to edit the criteria and the value entered.
- **Results:** Displays all the search results in a table. Click the hyperlink in the table to view more details about each search results.
- **Prepare your report for download:** To download the search results, provide a file name, file type, and click **Create download**.

FedEx® Billing Online | Invoices CART \$2,397.12 USD

Search results

Search criteria

Search for Express reference number: 1234-0000-3

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