FedEx® Billing Online

User Guide

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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 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.

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.

Administration

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

SECTION – 3

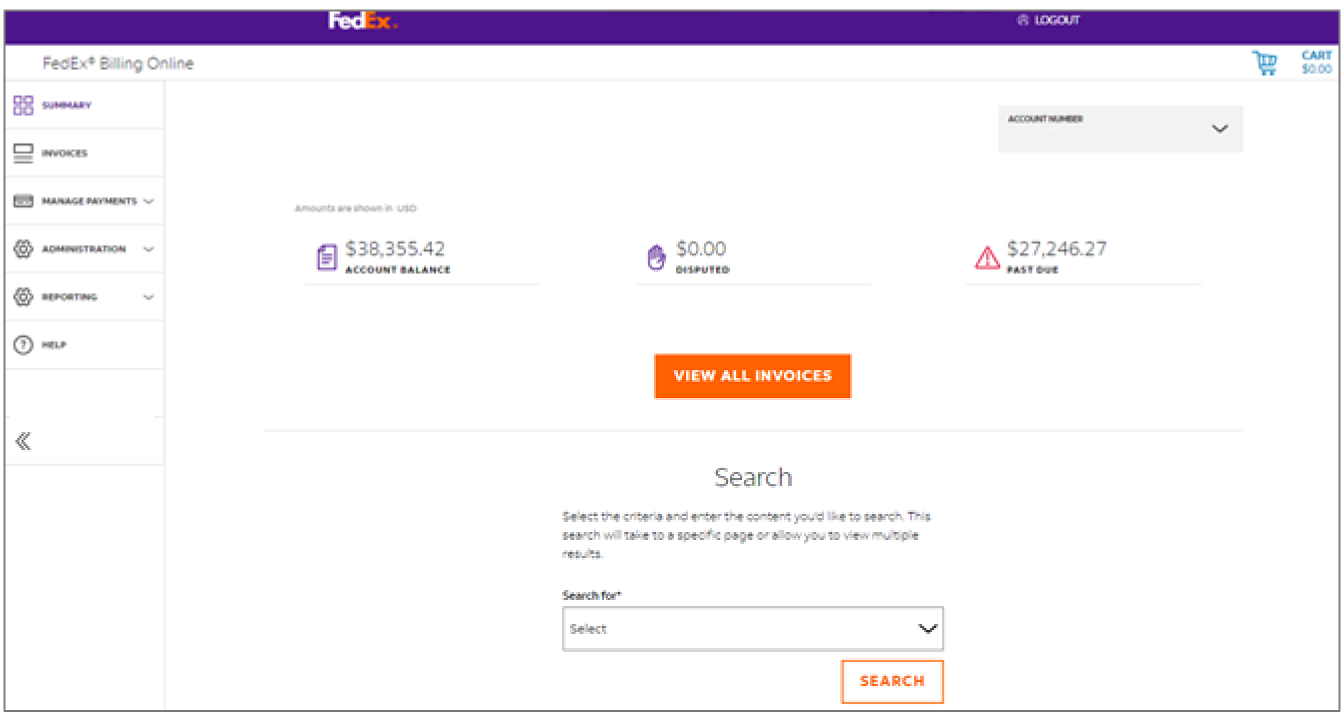
3. Let's begin!

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.



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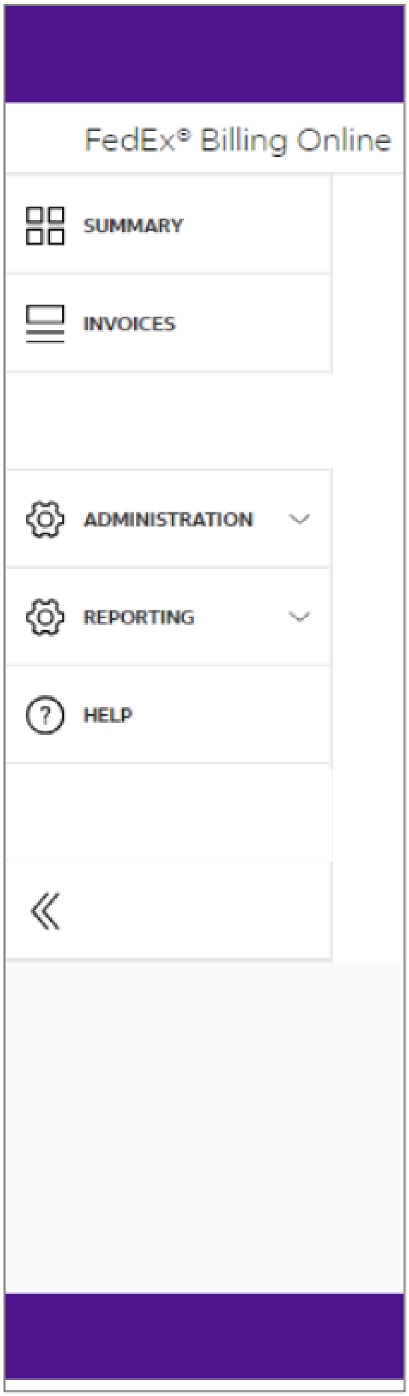
4. Short notes on menu



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.

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

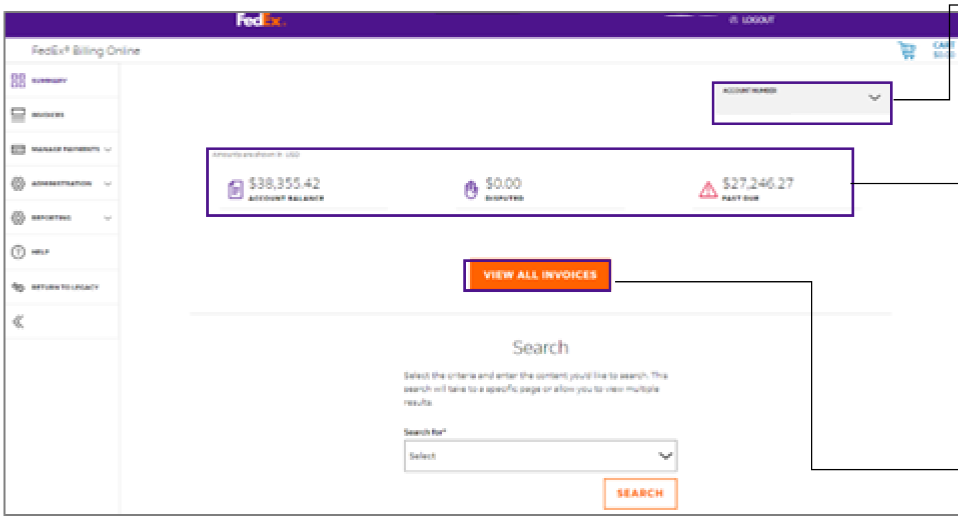
For extra guidance on the tool and new features.

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 and the past due amounts for the selected account number in your currency.

Desktop view:

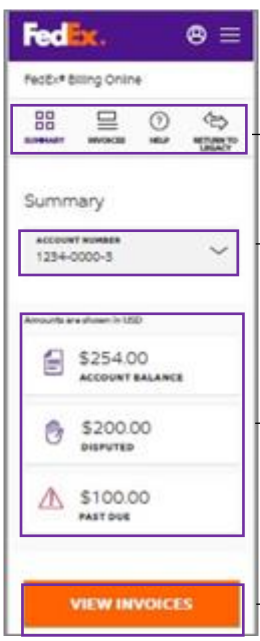


Account number drop-down provides you the list of all the account numbers you have access for.

Account Balance, and Past Due are two account summary tiles. Selecting any of these account summary tiles, will 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 and Past Due are two 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.

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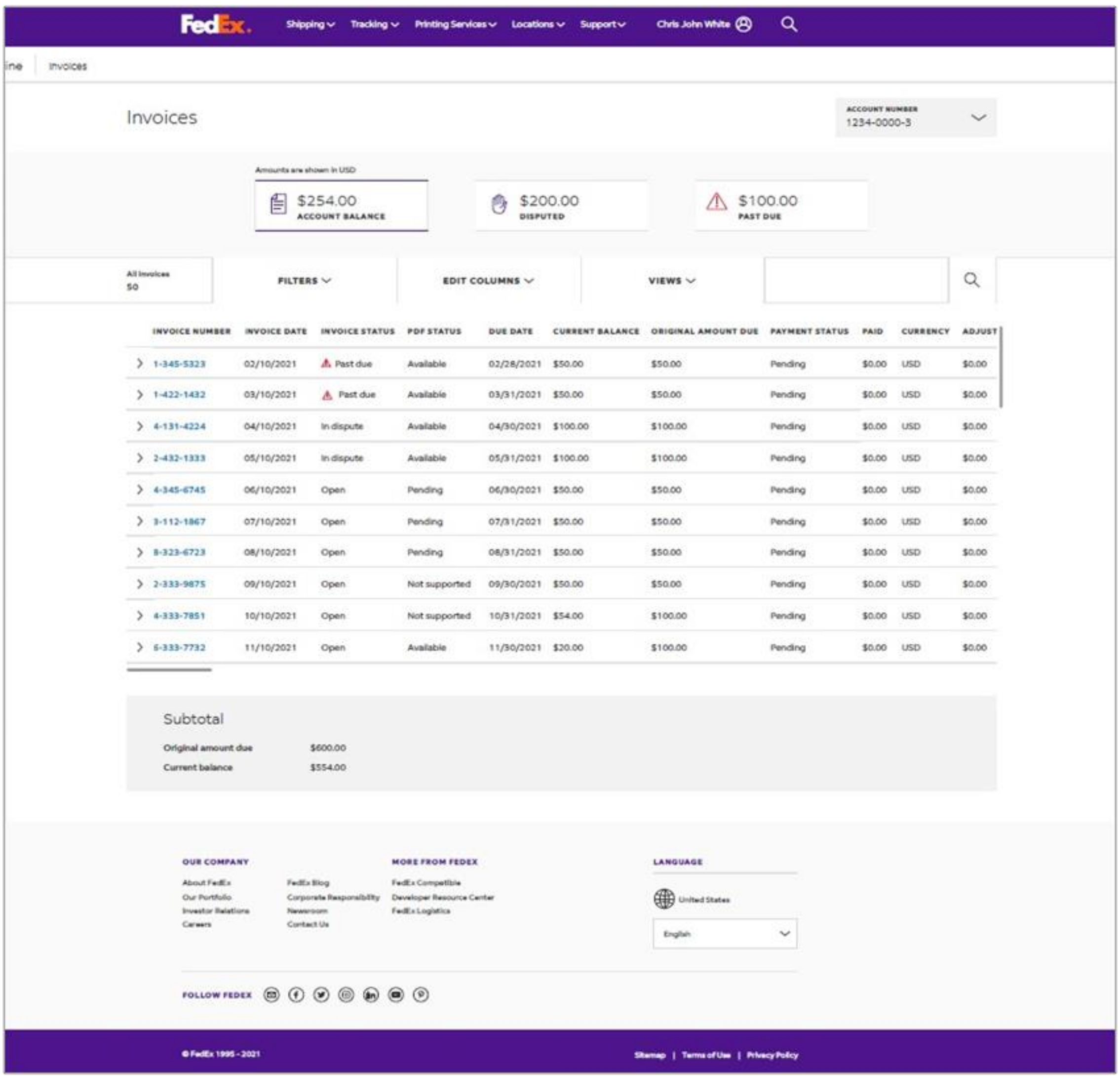
6. Invoices

6.1 Invoice table

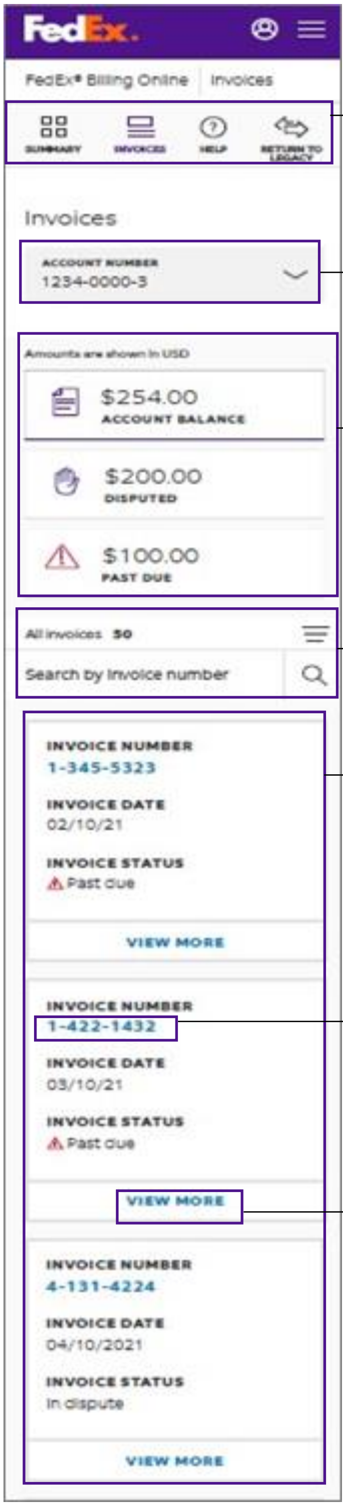
In the left navigation menu, click **Invoices**, to view the list of all the invoices for the selected account number in a tabulated format.

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:



Mobile view:



Access to navigation menu

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

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

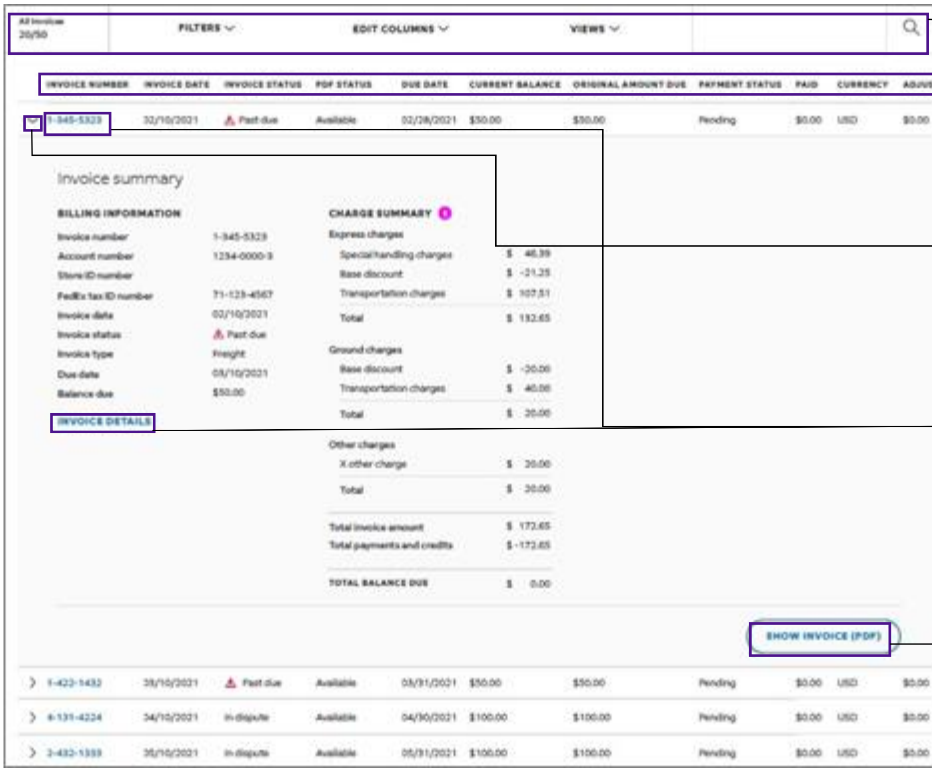
You can customize and search the invoices in the invoice table using these filters options.

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)**.

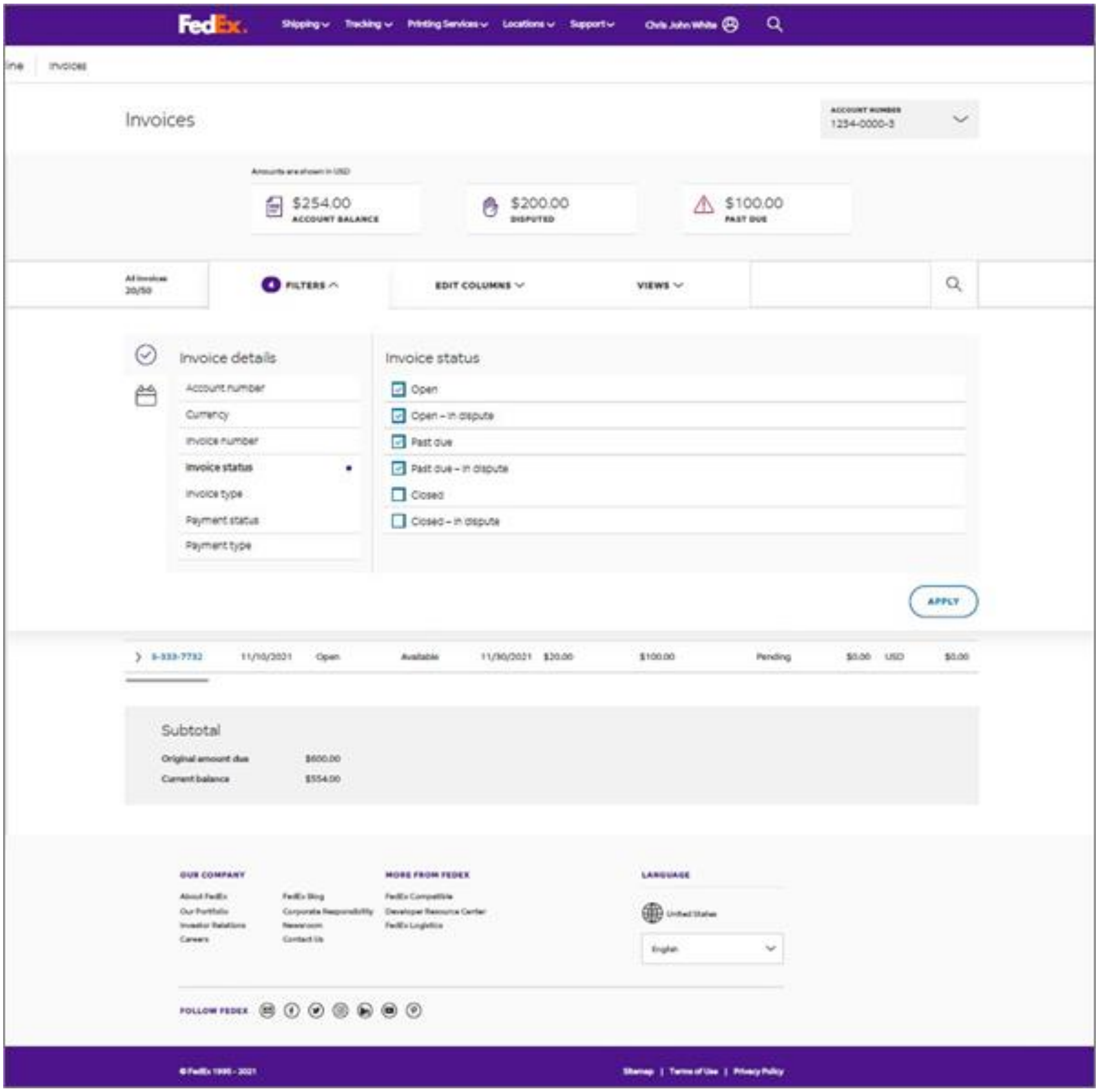
6.2 Invoice table filters and search

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

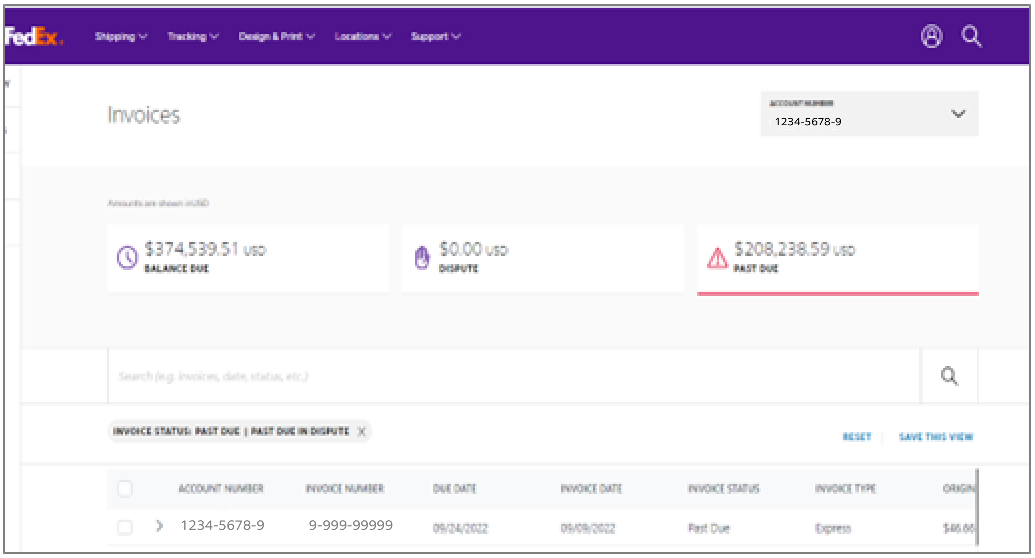
Below is the list of filters available to customize the invoice table:

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.
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.



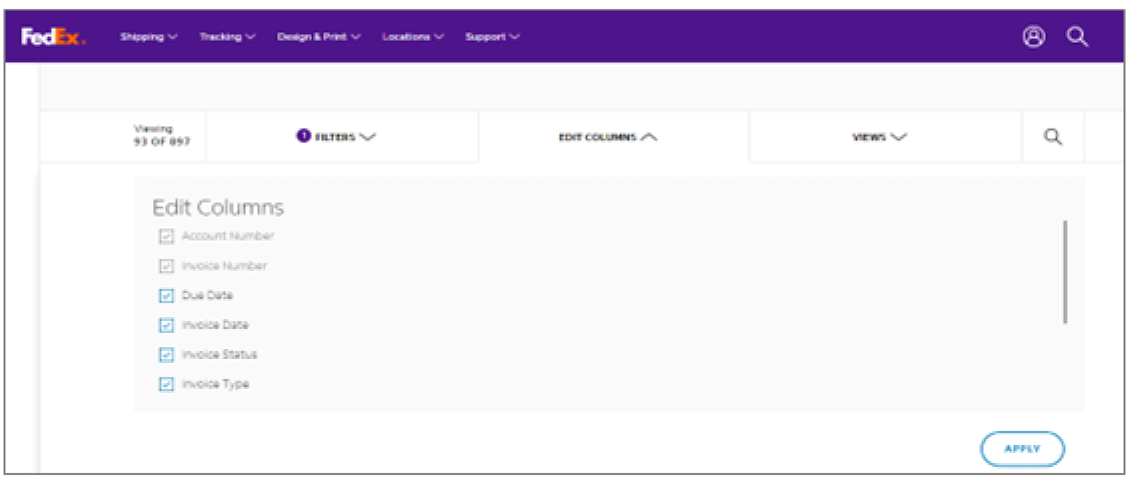
Search – To search any invoice, click the search icon, and enter your invoice number, date, or status of the invoice in the search text box. The invoice table displays the results for the search keyword.



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**.



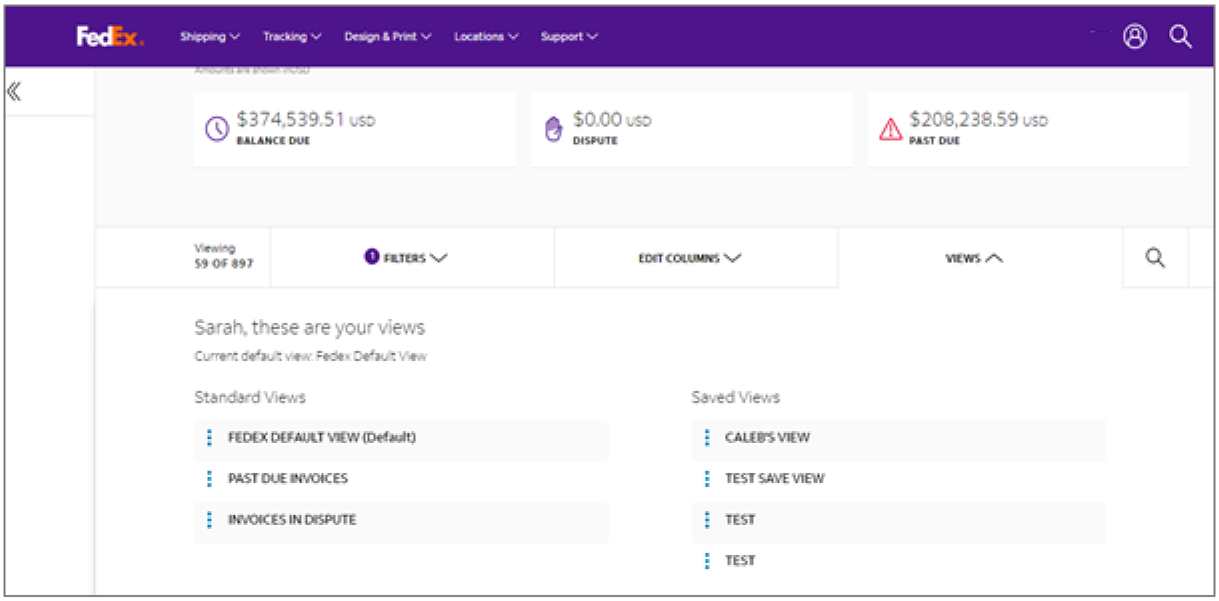
Edit views – In the invoice table, **Views** option is available to edit the view of the invoice table.

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.

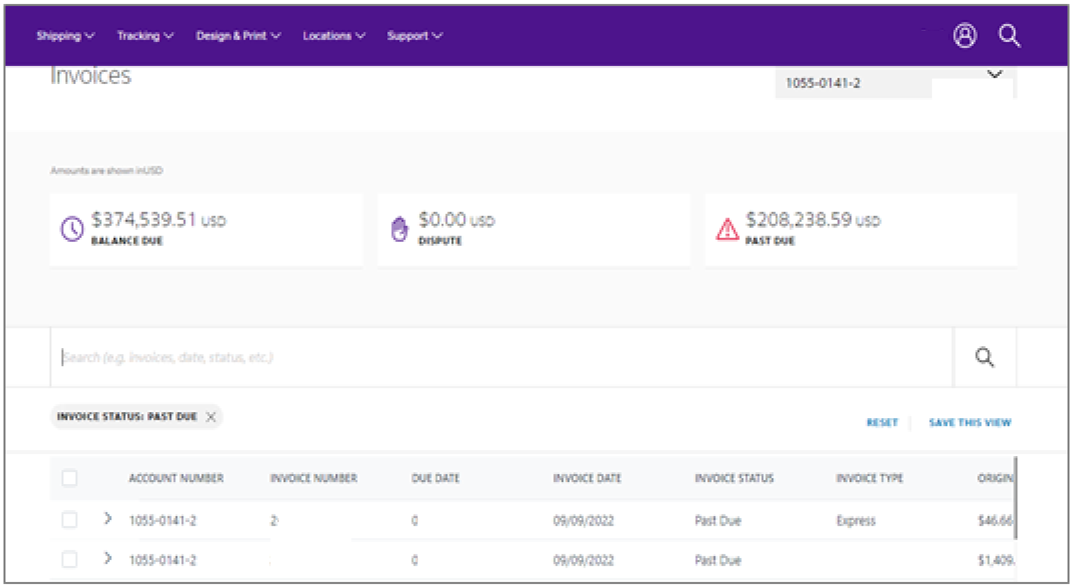
To apply these Standard Views to your invoice table, follow the below mentioned steps:

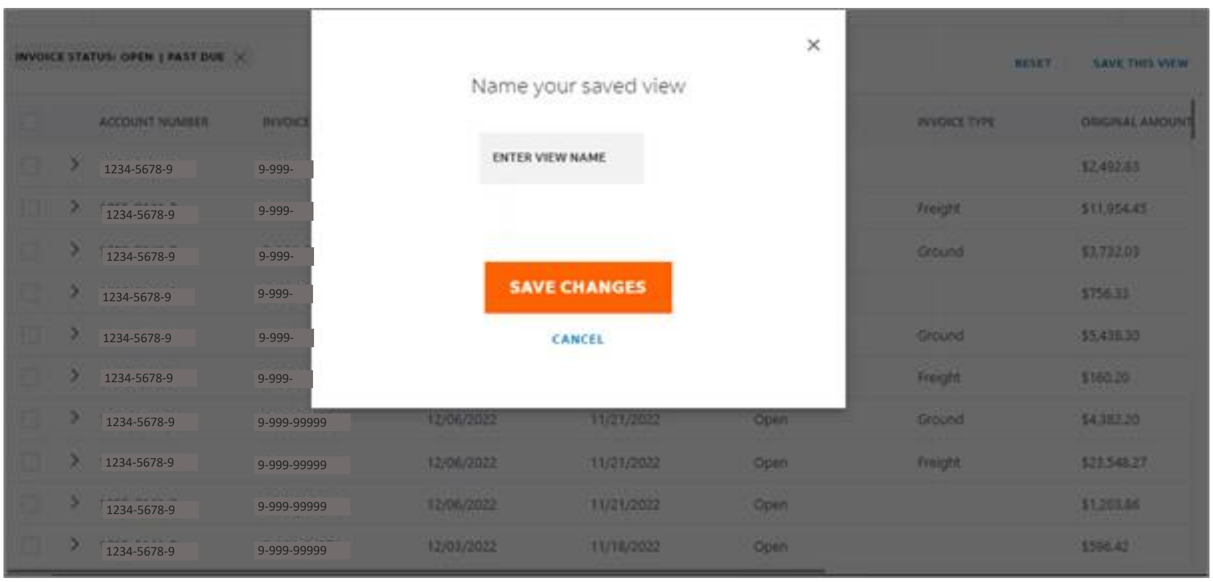
Step 1. Click the **Views** drop-down in the invoice table.
Step 2. Select the required view, from the list of Standard Views.



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

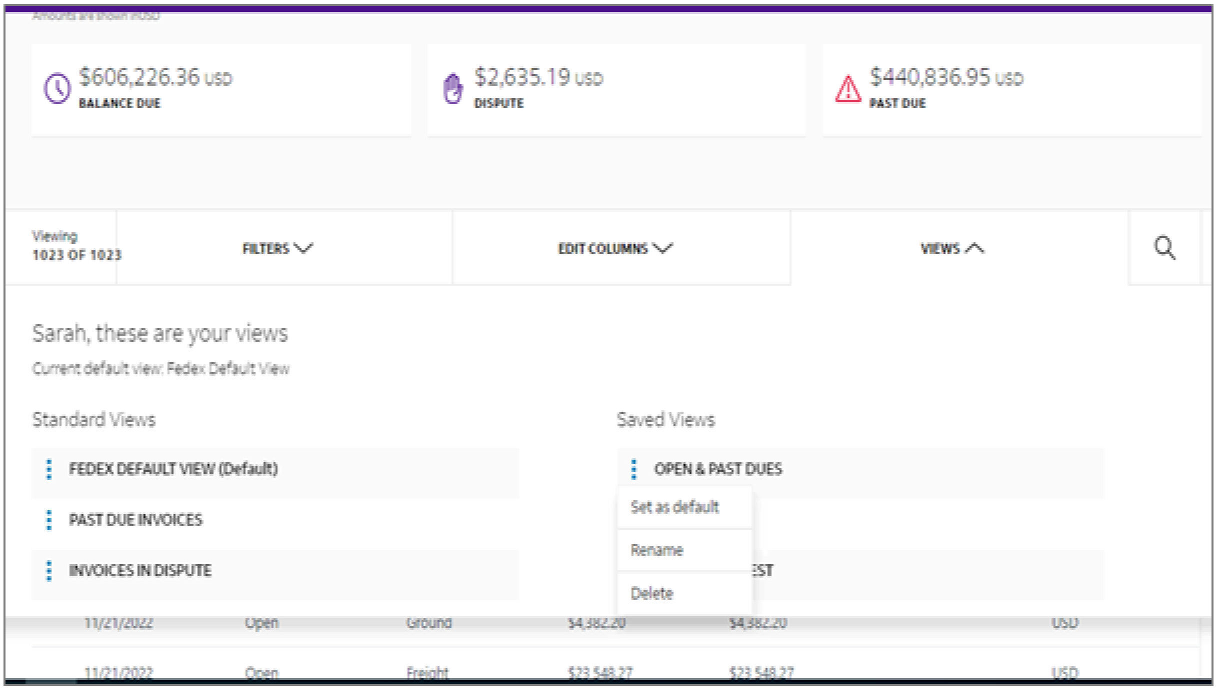
Step 1. Apply the filters you wish to include in your invoice table.
Step 2. Click **Save this View**.
Step 3. Enter the name of your view in **Enter View Name** and click **Save Changes.**
Step 4. Click the **Views** drop-down to review your saved views.



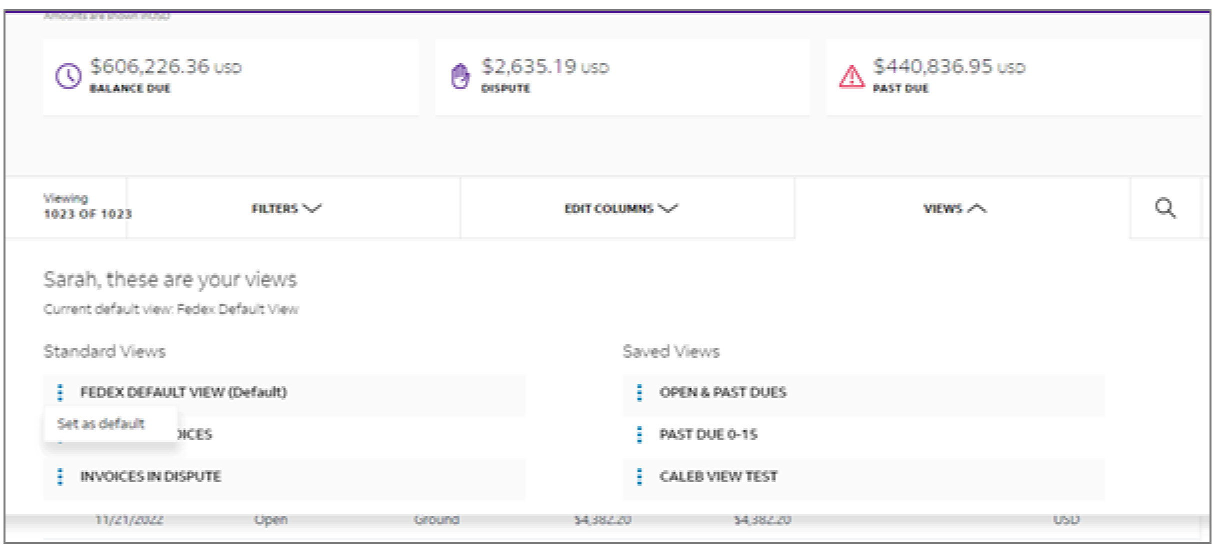


You can also rename or delete your saved views or set your saved view as your default view.

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.



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**.



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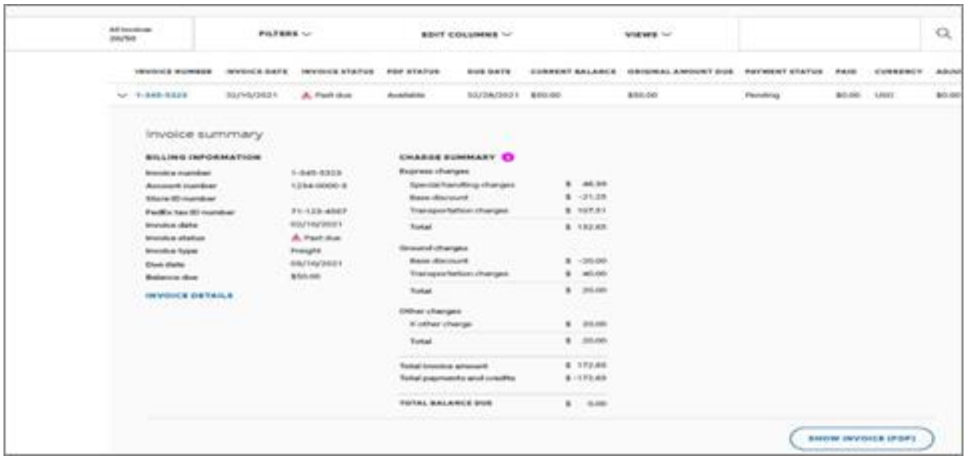
7. Invoice details

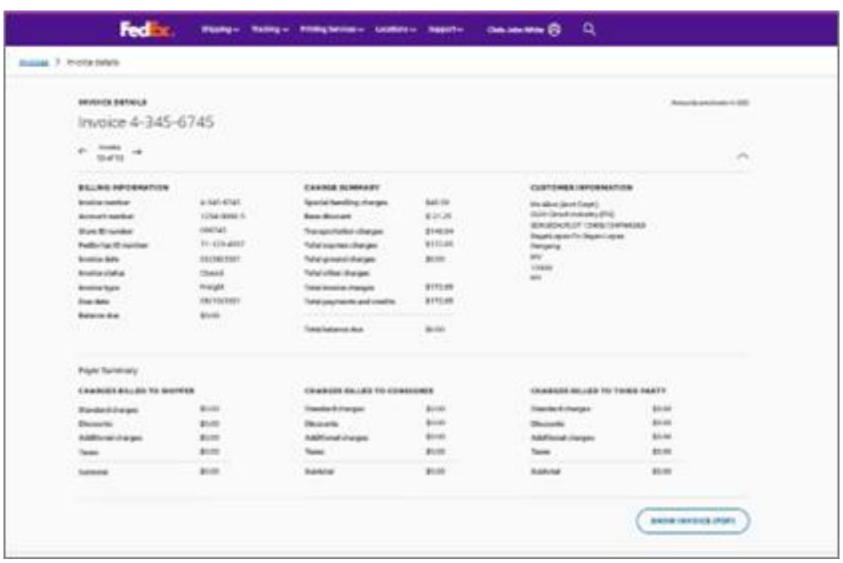
To get more details about your invoices, click the Invoice number or Invoice Details.



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.



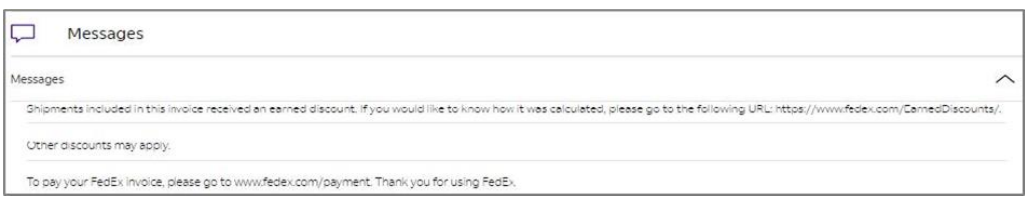
To get the PDF format of your invoice details click **Show Invoice (PDF)**.

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.

Payments and charges table provides detail about Transaction history of the invoice.

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

Messages includes information and messages specific to your invoice.



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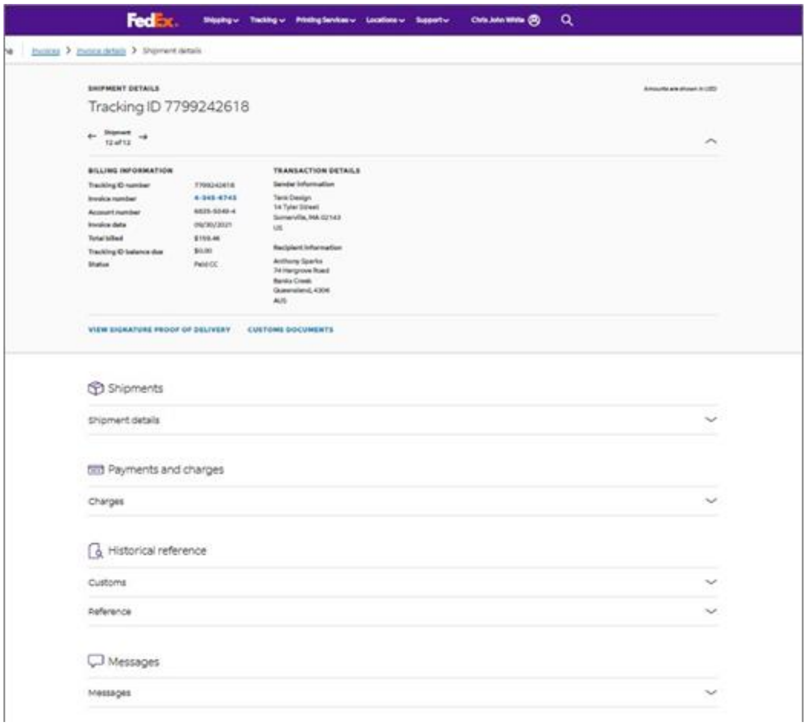
8. Shipment details

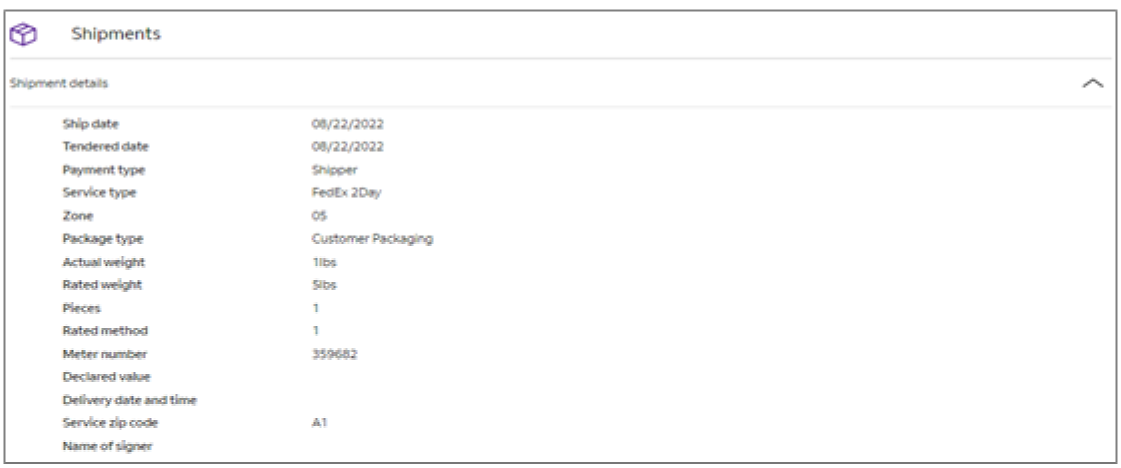
To get more information about the Shipment details, in the shipment table click the Tracking ID.

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

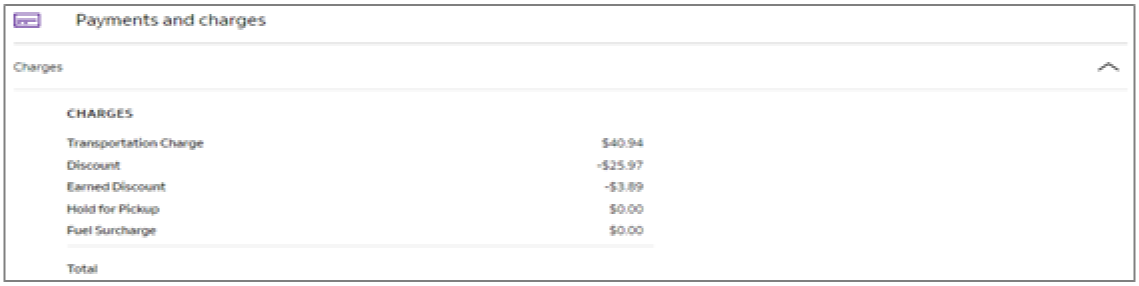


In the Shipment details page, there are four parameters: Shipments, Payments and charges, Historical references, and Messages.

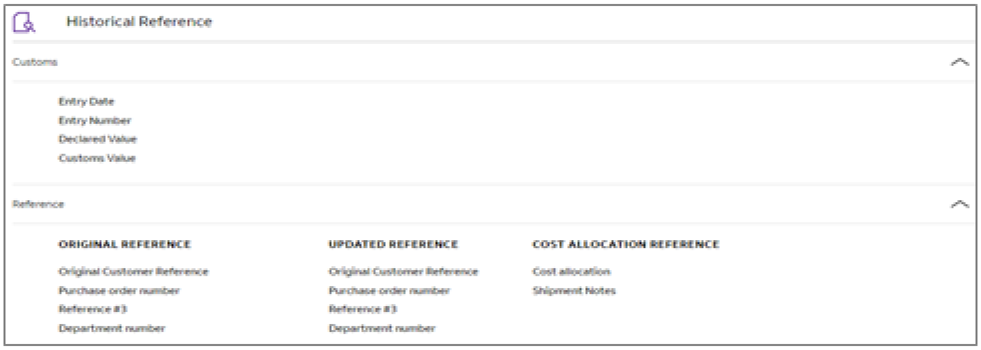
Shipments provide details about the Ship date, Tendered date, Payment type, Service type, Zone, Package type, Actual weight, rated weight, Pieces, Rated method, Meter number, Declared value, Delivery date and time, Service zip code, and Name of signer.



Payments and charges provide details about Charges.



Historical reference provides details about customs and references.



Messages includes information and messages related to your shipments.

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

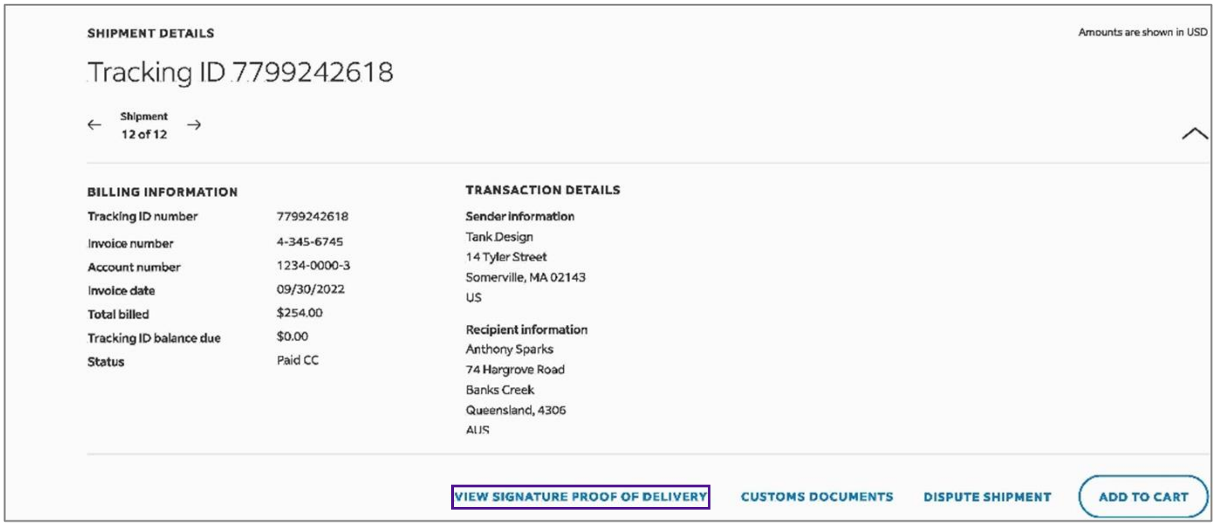
SUBTOTAL

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.



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

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

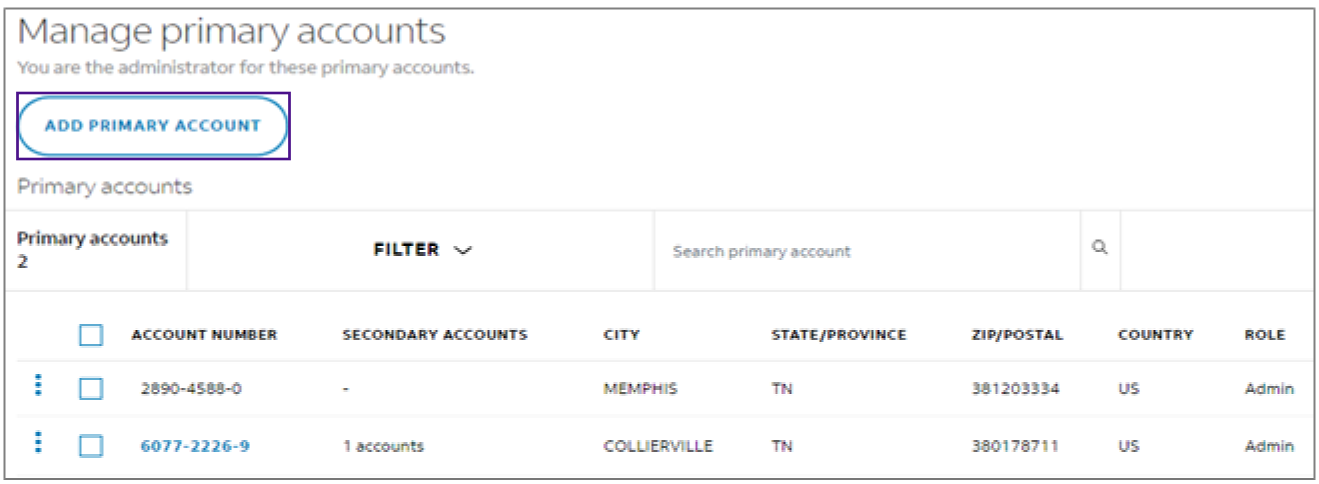
Under **Administration,** you will have four options: Manage accounts, Manage users, Application settings, and Email notifications.

11.1. 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**.

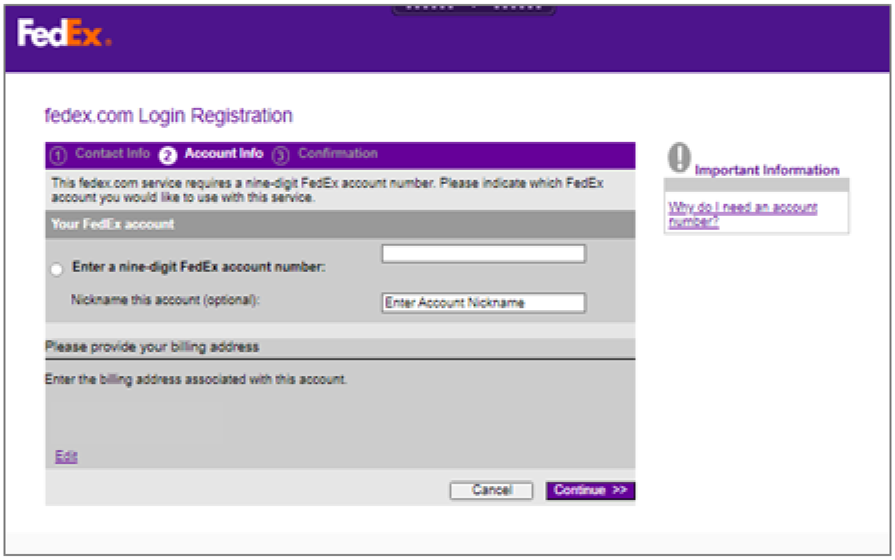
Manage primary accounts

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



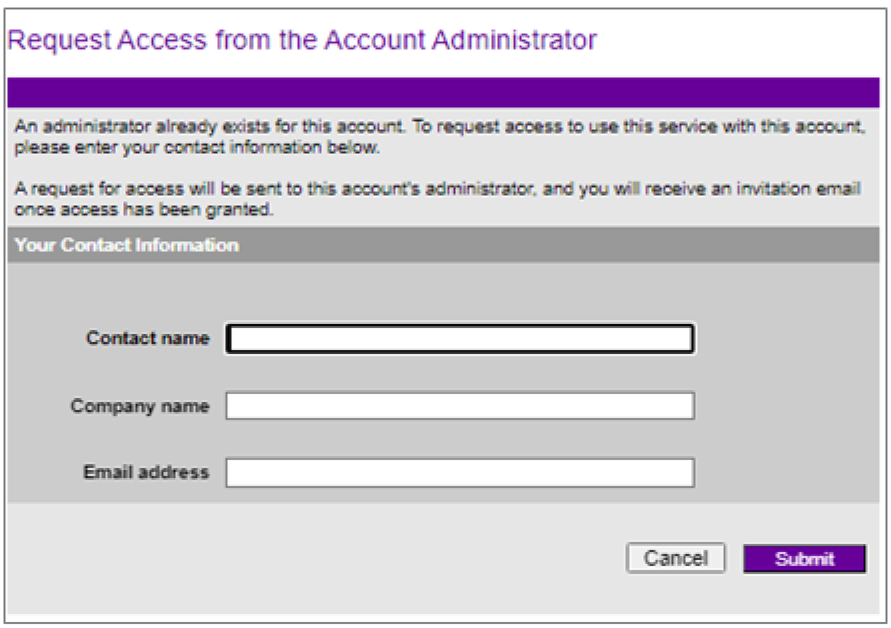
The top left corner of the table displays the number of primary accounts linked to your account.

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



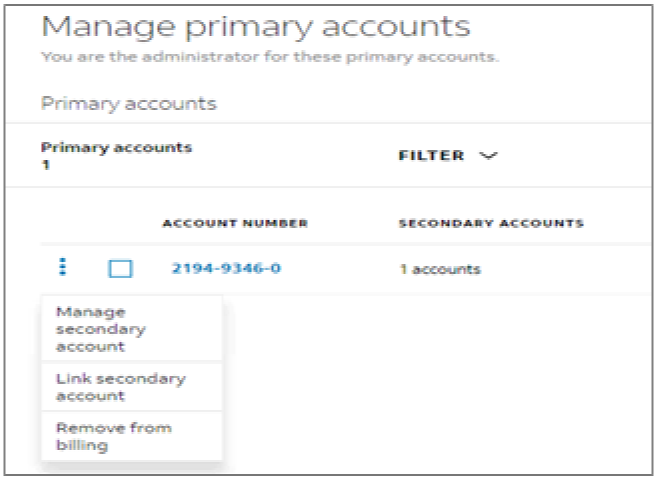
To add your account details, click the select icon ⊘ and enter nine-digit account number in the text box. If you wish to add any nickname to the account, add it in the Enter Account Nickname text box and click **Continue**.

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.

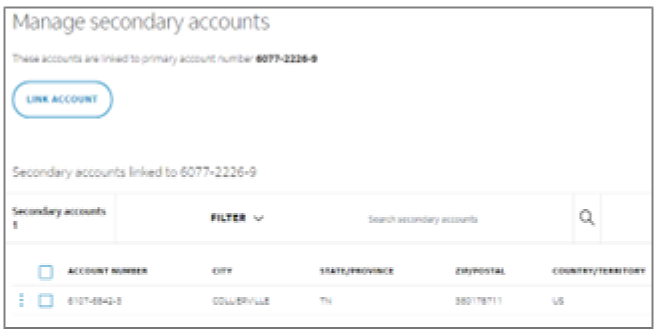


Enter the relevant details in the respective text box and click **Submit**. An email will be sent to the respective administrator, and once the administrator grants the access, you will receive an email with the confirmation.

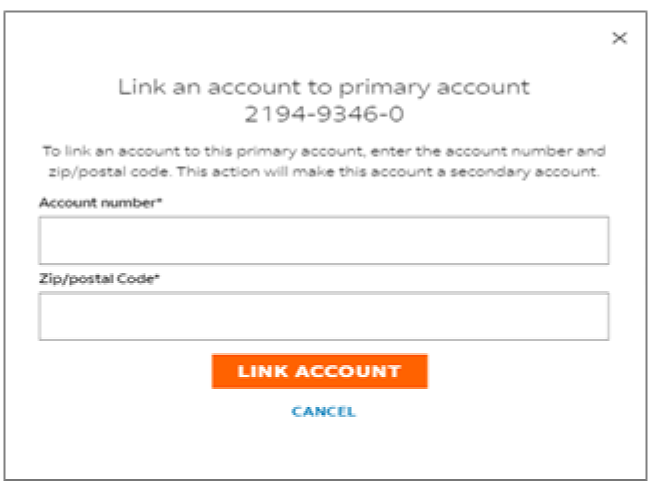
Also, in Manage primary accounts page, each row of the table has three dots and a checkbox. Clicking the three dots will display three different options: Manage secondary account, Link secondary account, and Remove from billing.



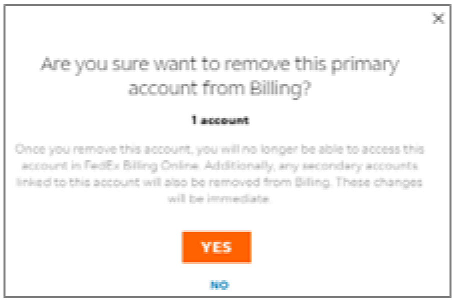
Clicking **Manage secondary account** will direct you to the Manage secondary accounts page.



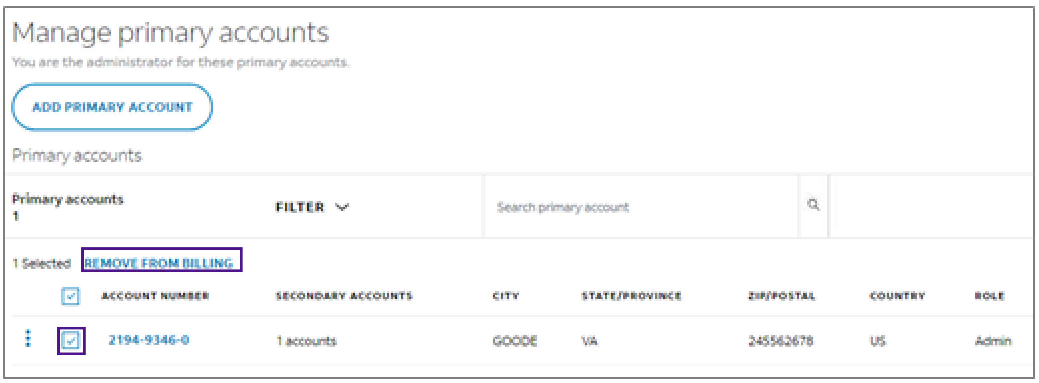
Clicking **Link secondary account** will direct you to the Link an account to primary account window.



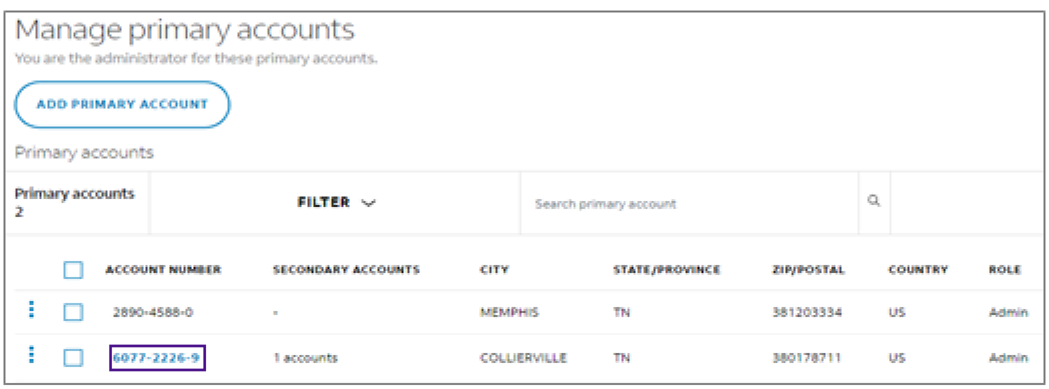
Clicking **Remove from billing** will direct you to the below window. Clicking **Yes** will remove the selected account from your FBO account and clicking **No** will close the window and no changes will be made.



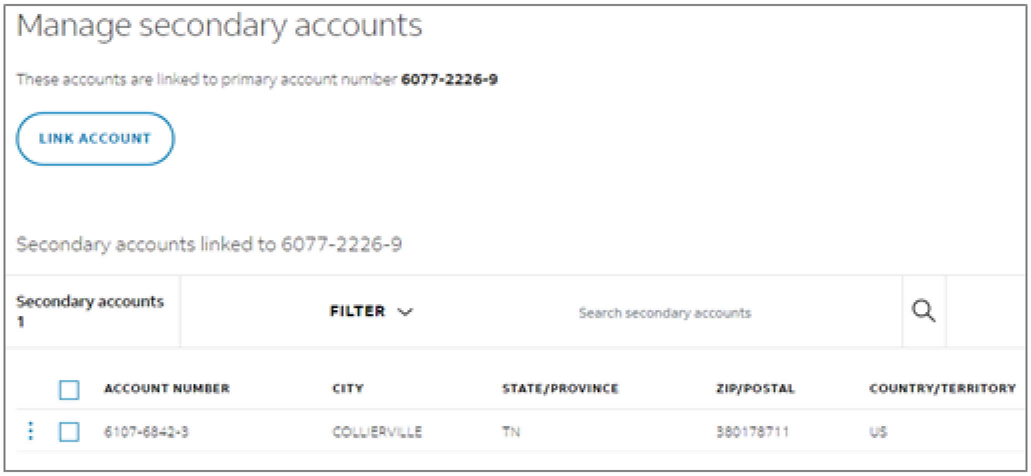
Selecting the checkbox ☐ will also enable Remove from billing hyperlink. If you wish to remove multiple accounts, select the checkbox ☐ of the respective accounts, and click **Remove from billing**.



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

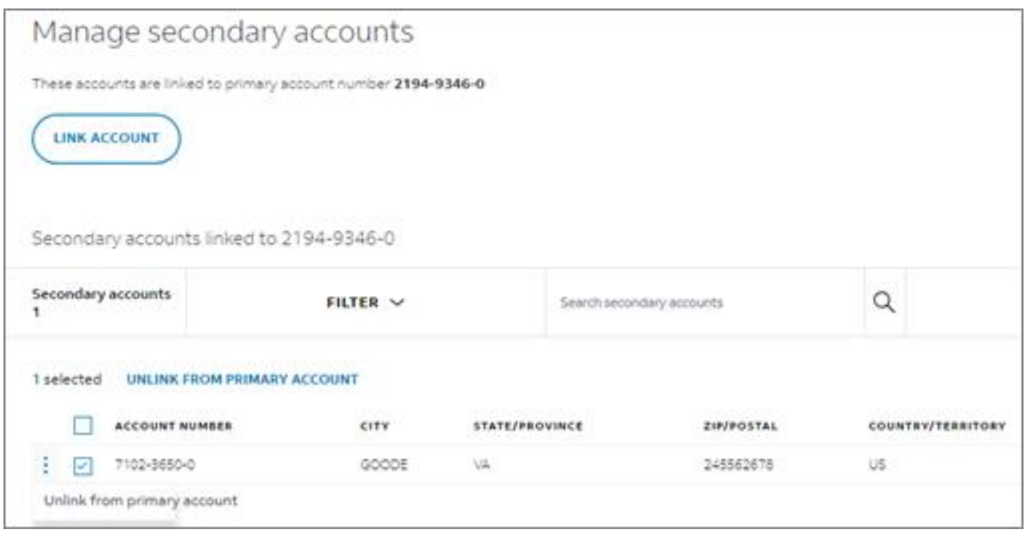


Clicking that hyperlink will direct you to the Manage secondary accounts page.



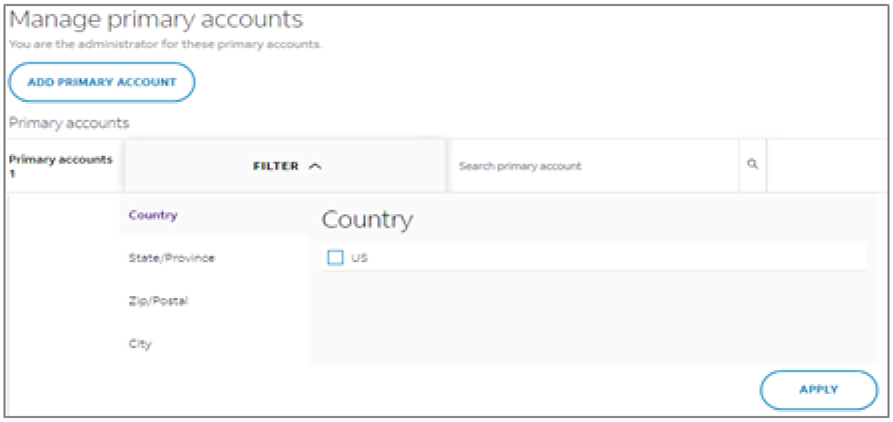
Manage secondary accounts

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.

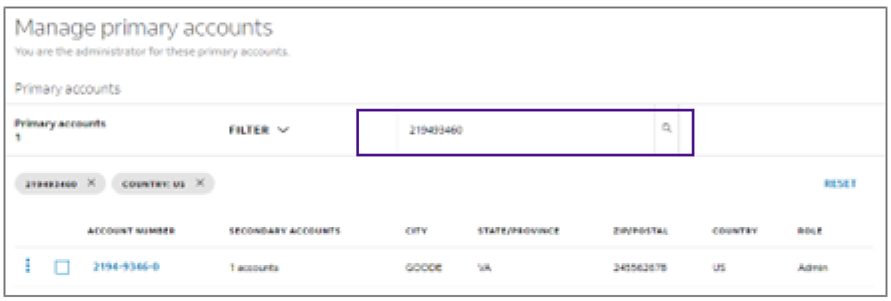


Both Manage primary accounts and Manage secondary accounts page comprises a table with options to filter and search the account numbers in the table.

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



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



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

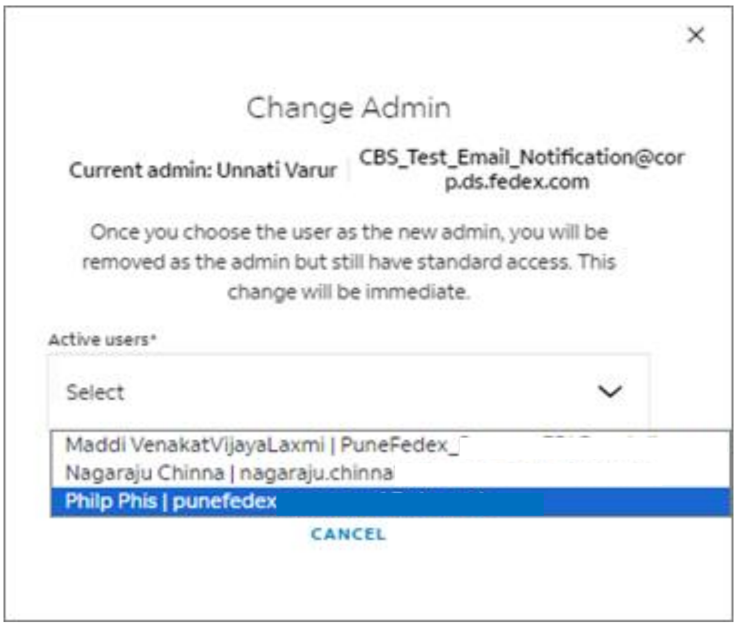
11.2. Manage users

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

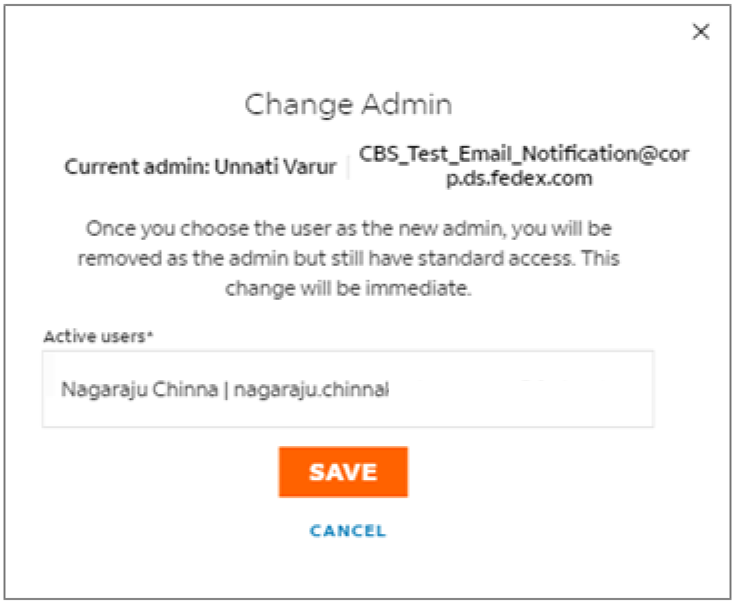
Admin user of the account is displayed above the Active users table and all the other standard and view only users list are displayed in a tabulated format.

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

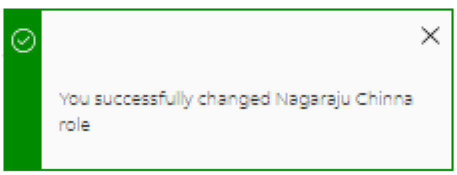
If you wish to change the admin user of the account, click **Change admin** hyperlink and the below window is displayed.



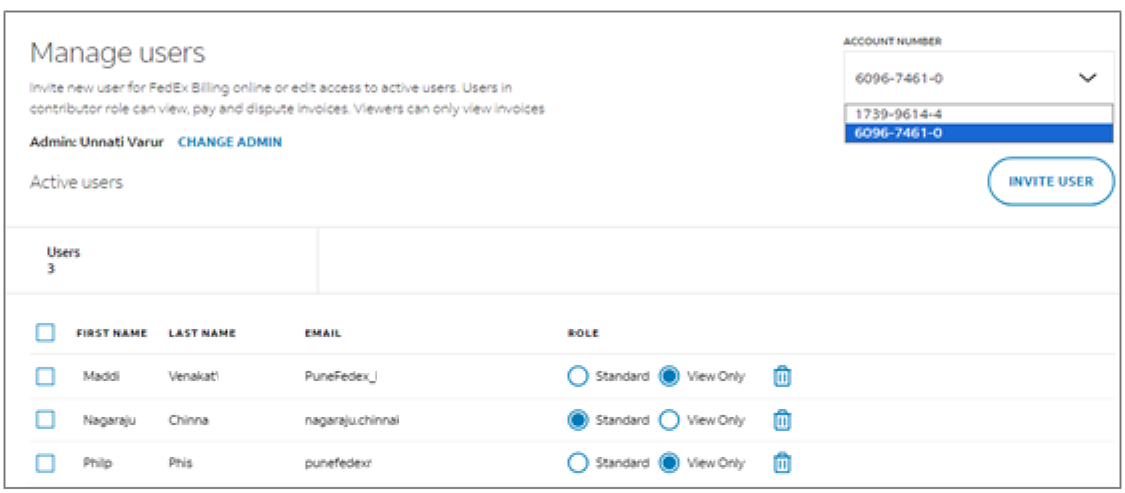
Click the Active users drop-down and you can view the list of all the active users of the account. Select the user, to whom you wish to assign the administrator role and click **Save**.



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.

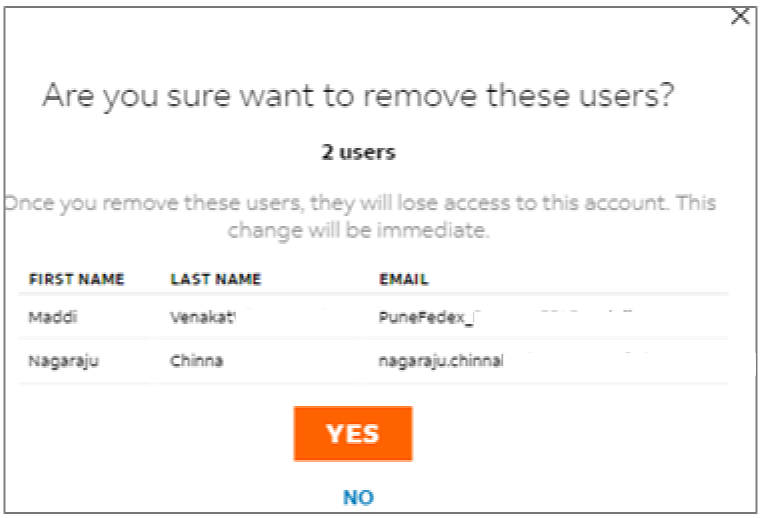


If you wish to switch between other primary accounts in Manage users page, in the top right corner click account number drop-down. You can view the list of all the primary accounts, to switch between them, click the respective account number.



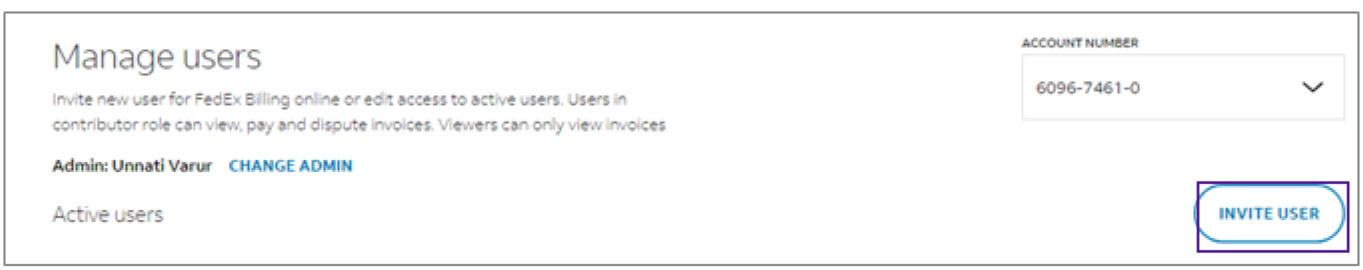
If you wish to remove any of the standard and view only users from the account, you can either click the trash can icon or click the checkbox corresponding to the respective user(s) and click **Remove user**.

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

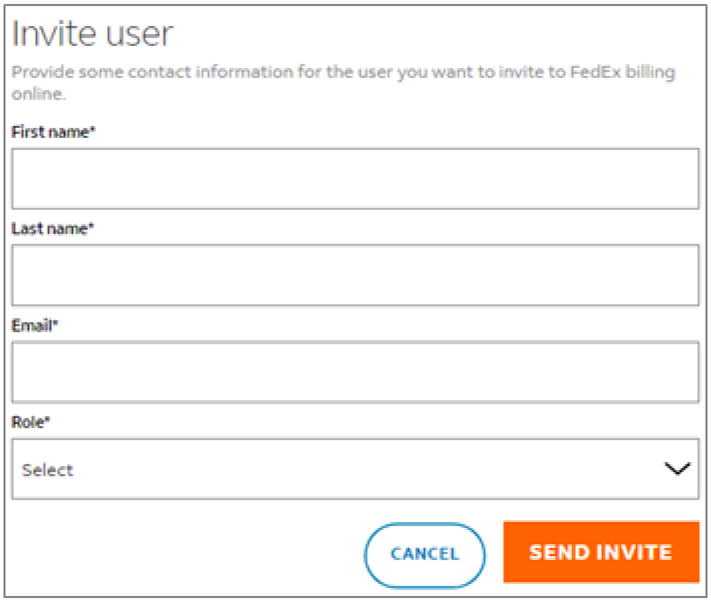


Clicking **Yes** in the above window will remove the access of the selected user(s) from the account and clicking **No** will close the window and no changes will be made.

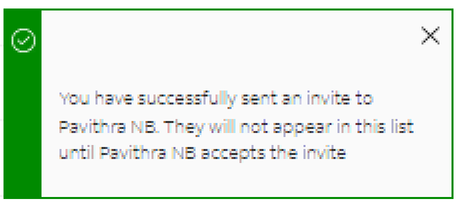
In addition to the above features, if you wish to invite any new users to the account, click **Invite user**.



Clicking Invite user will display the below page.

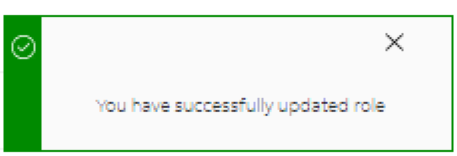


In the above window, fill in all the required information in the respective text box and click **Send invite**. Then, an email will be sent to invited user's mail id and the below success message will be displayed.



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.

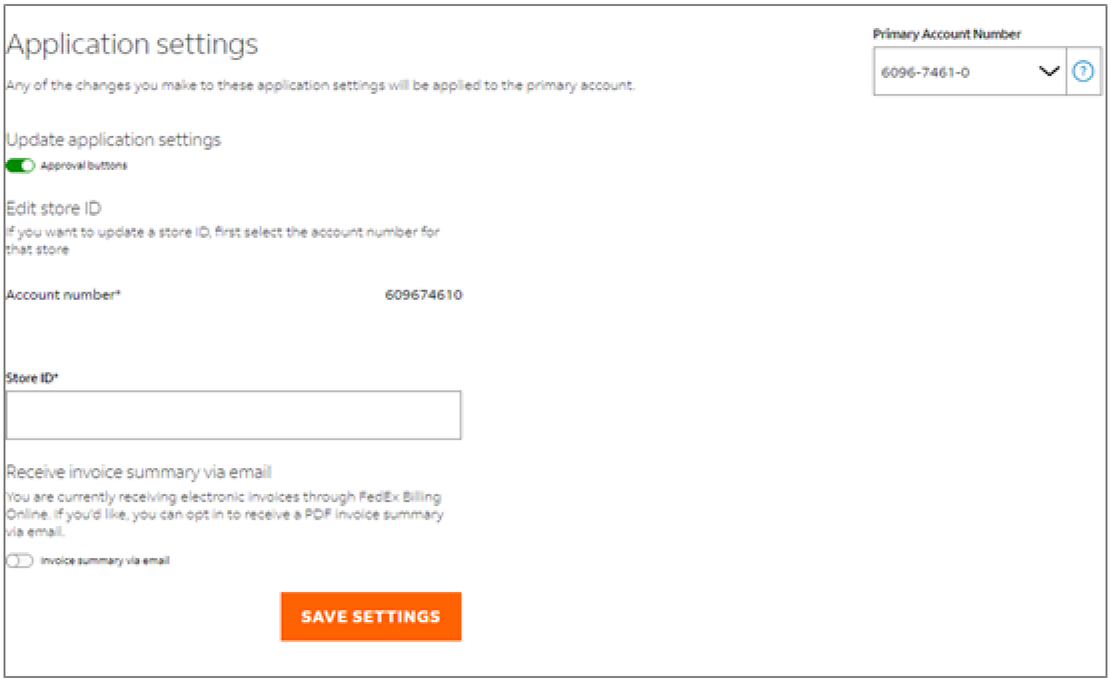
Once the roles of the users are changed, the below success message will be displayed.



11.3. 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.

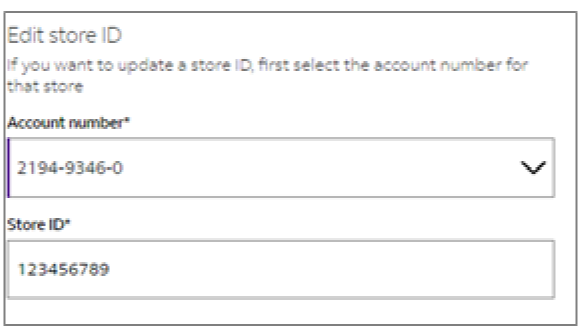
Note: Only the Admin users can view and access the Application settings page.



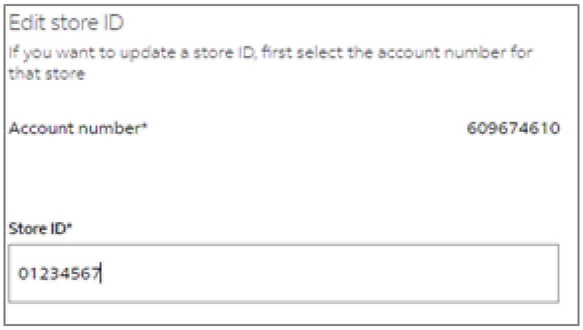
Under Application settings, you can make three major preferences for the account: Store ID, and Invoice summary via email.

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.



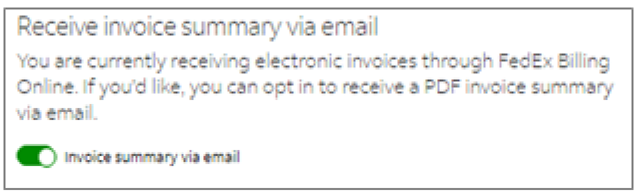
If there are no secondary accounts linked to the account, then there will be no account number drop-down in the above page, instead the primary account will be displayed in a read only mode and you can still the edit the store ID for the primary account.



Receive invoice summary via email:

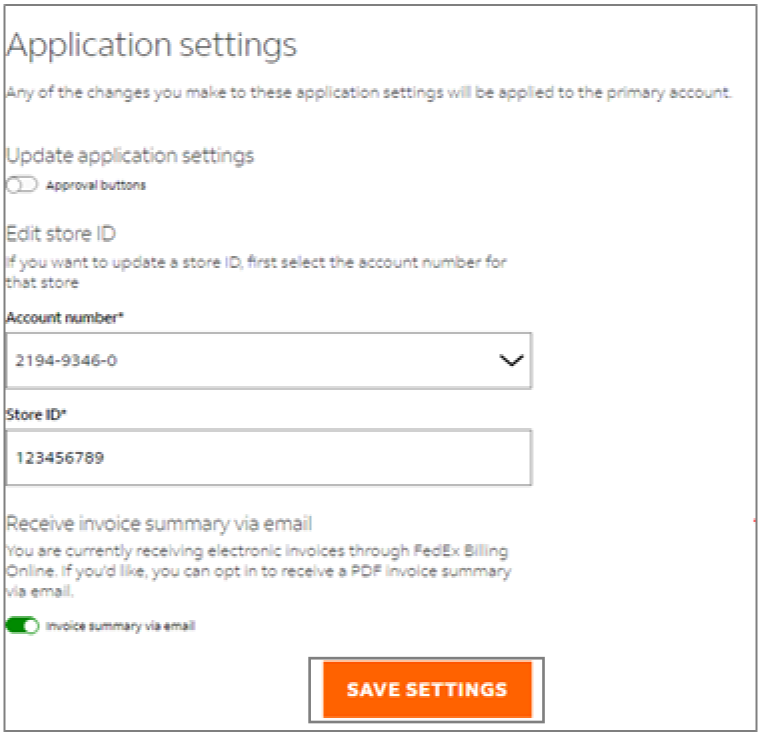
This setting allows you to select whether you want to receive your invoice summary via email.

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

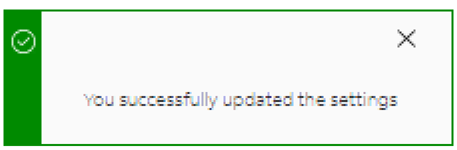


If it is toggled OFF, you will not be receiving the invoices summary via email, you can still view the electronic invoices in the application.

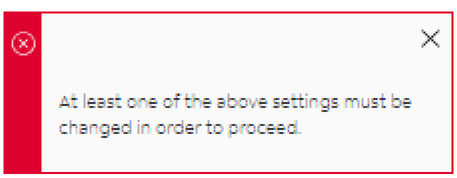
After applying all the required settings in the Application settings page, click **Save settings** to save the changes applied.



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



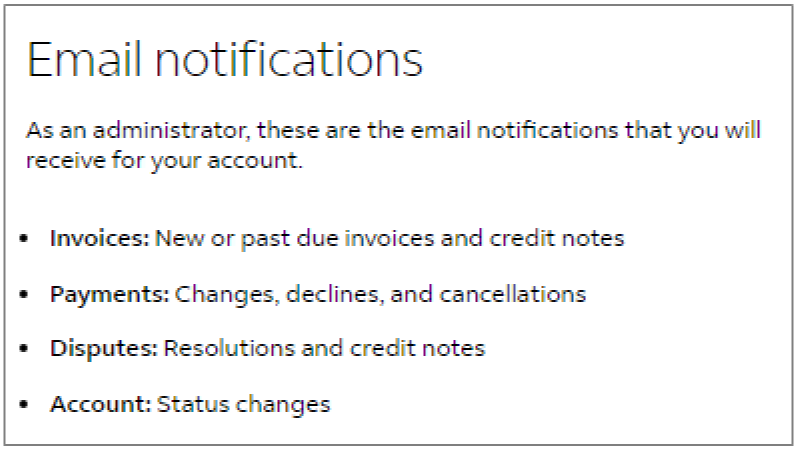
If you tried clicking Save settings with no changes applied, the below error message will be displayed.



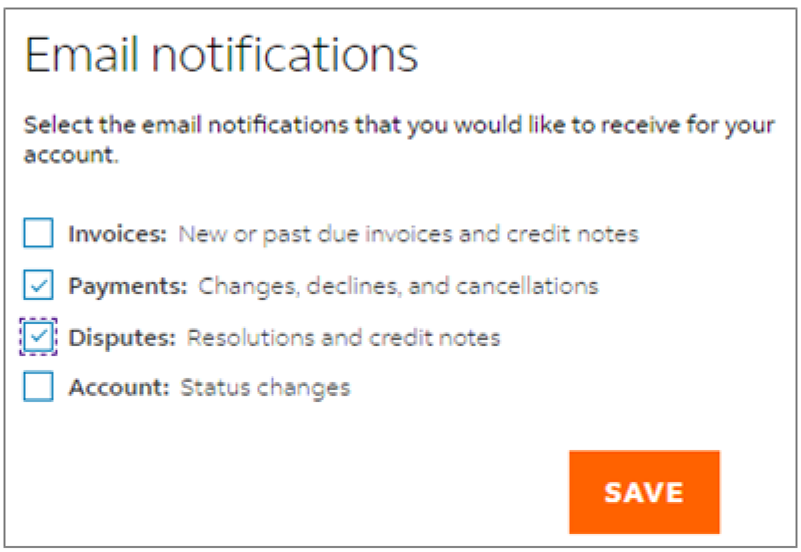
11.4. Email notifications

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

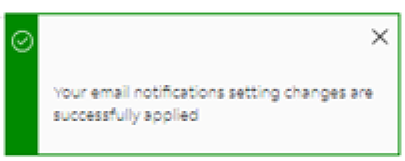
An admin user will receive email notification for all the scenarios listed below.



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**.



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



12. Disputes

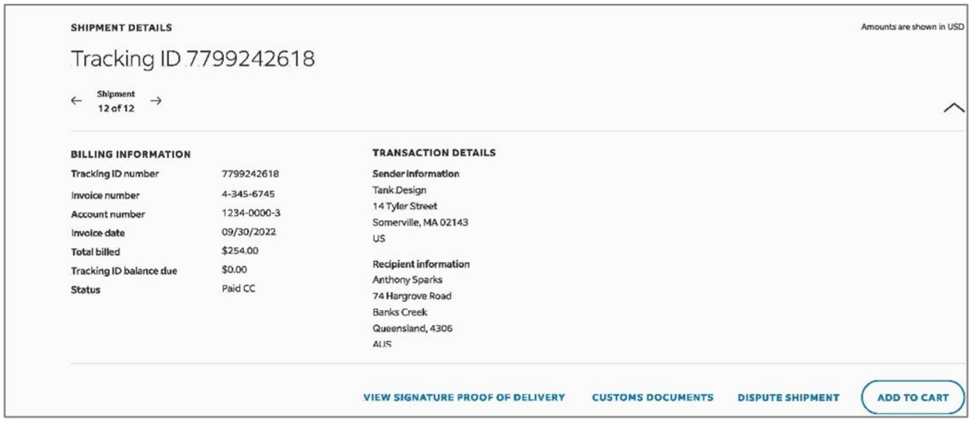
If you have concerns about any of the charges applied to the account prior to payment, you can raise a dispute online.

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.

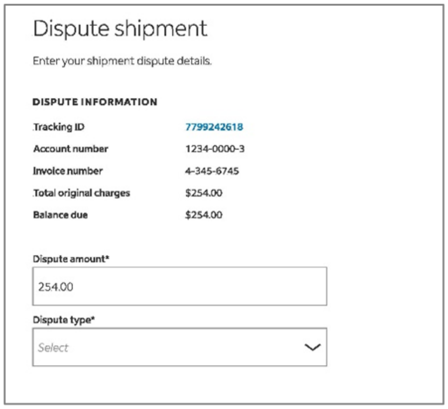
12.1. Dispute shipments

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**.



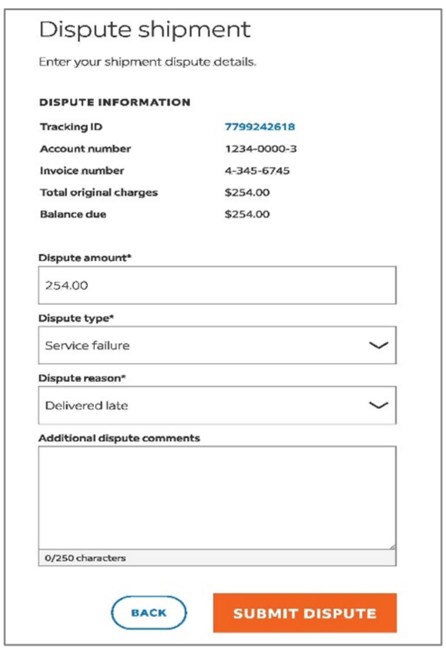
Step 5. In the Dispute shipment page, you can view the tracking ID, account number, invoice number, total original charges, and balance due amount.



Step 6. In the Dispute amount text box, the balance due amount will be prepopulated.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 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.



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.**

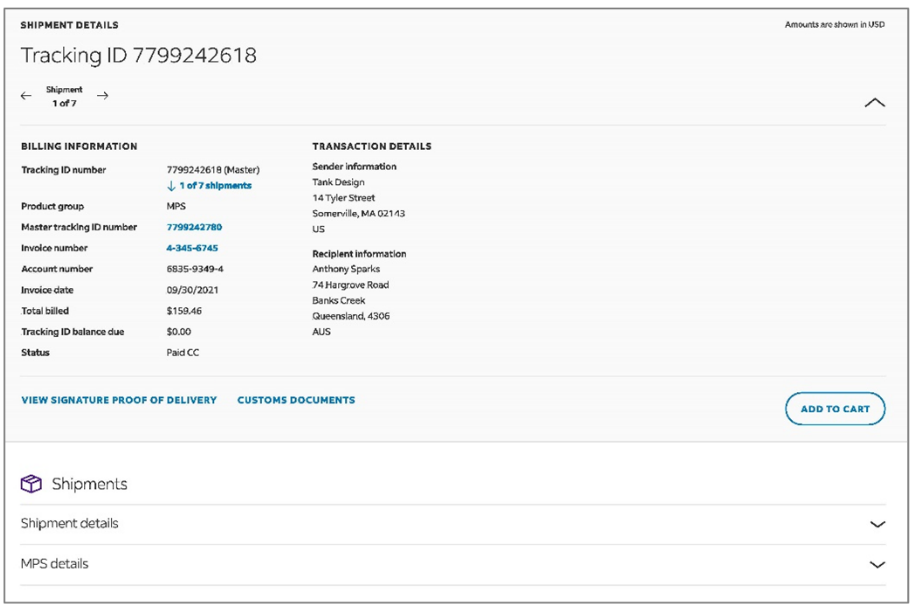
Now, the Invoice will be submitted for dispute, an email notification will be sent with the dispute details, and below success message will be displayed.

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

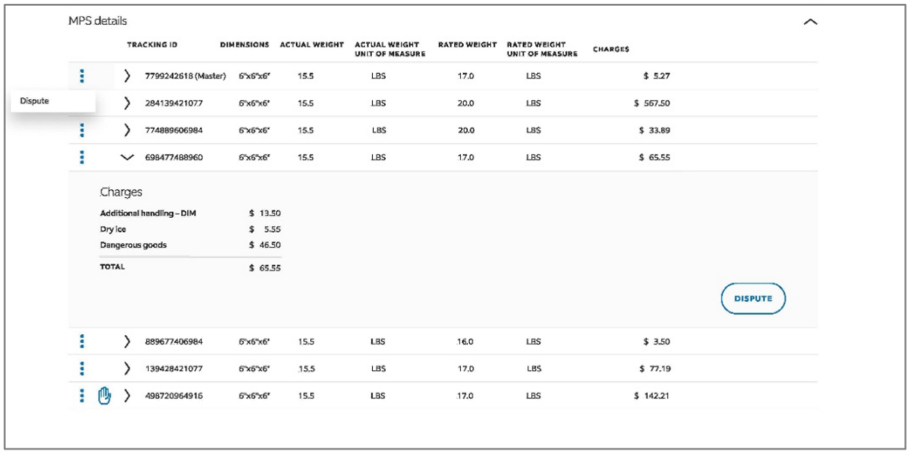
12.2. Dispute Multi Package Shipments (MPS)

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

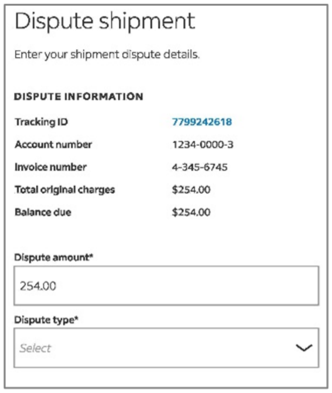
Step 1. In the left navigation menu, click **Invoices** or in the Summary page, click **View all invoices**.
Step 2. Click the invoice number from which you wish to select the tracking ID.
Step 3. In the Invoice details page, scroll down through the Invoice details and under Shipments module, click the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



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



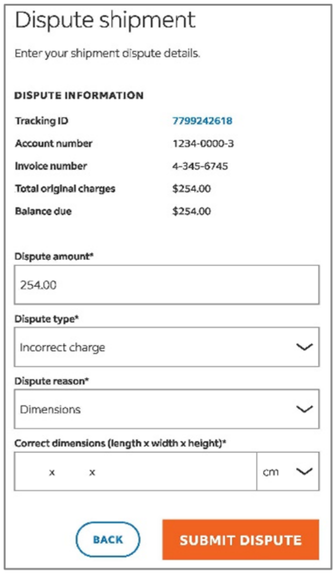
Step 6. In the Dispute shipment page, you can view tracking ID, account number, invoice number, total original charges, and balance due amount.



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.



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.

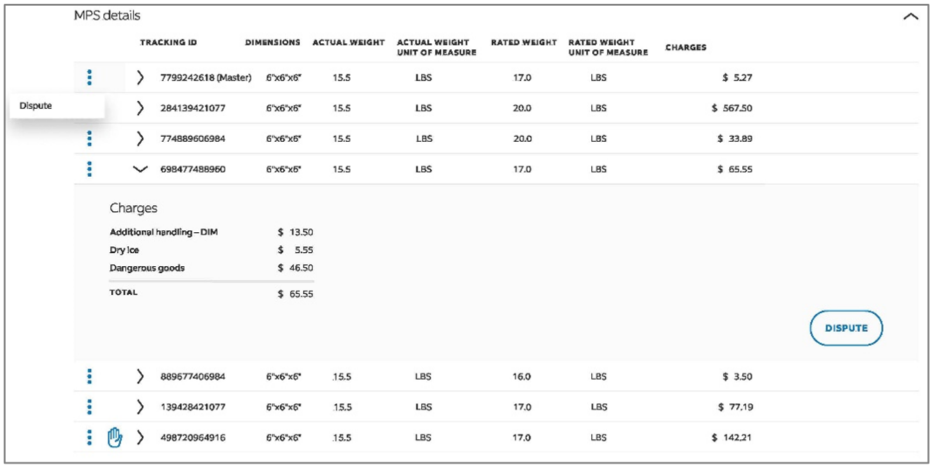
Step 10. Once all the required information is filled, click **Submit dispute**.

Now, the MPS shipment is submitted for dispute.

12.3. View dispute items

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

1. 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).
2. 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.



3. 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 - 13

13. 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.

13.1. 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**.

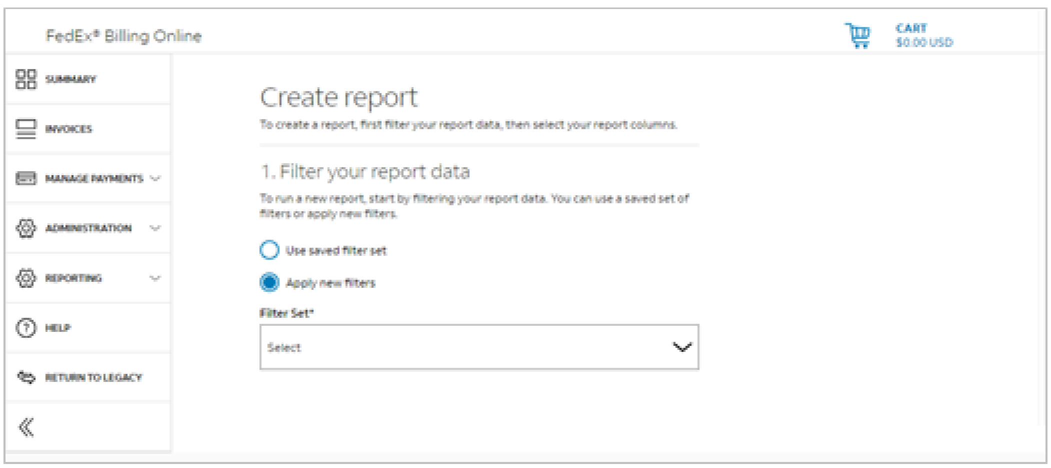
Create report involves two different sections: Filter your report data and Select your report columns.

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**.

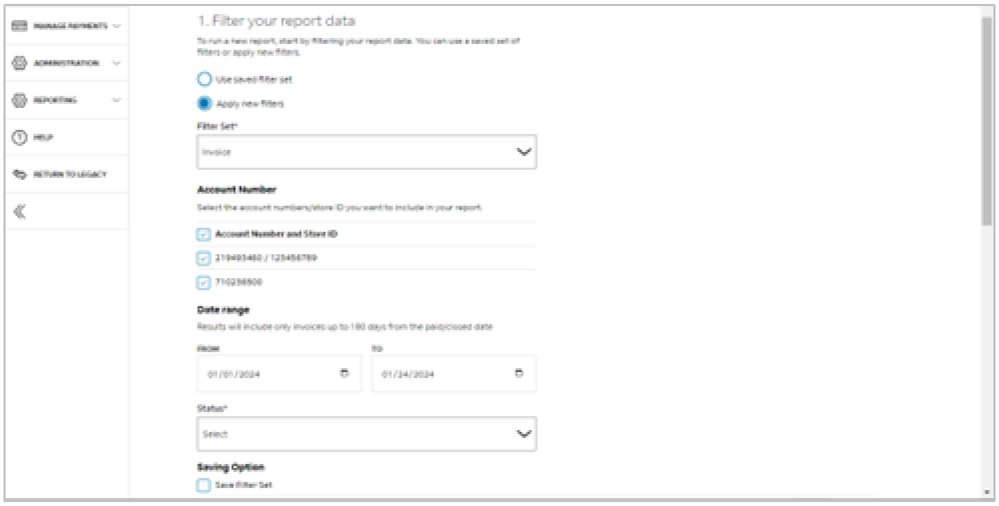
- **Use saved filter set**: This option allows you to use the saved filter set from the Filter Set drop-down. All the values of that filter set will apply to the current report. Click here to know about Manage Filter Set.
- **Apply new filters**: This option allows you to create a new filter set, first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



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.



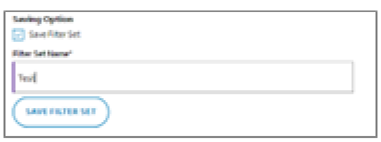
Saving option

Under Saving Option, there will be two scenarios:

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

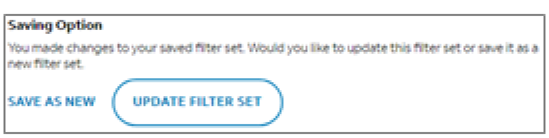
Save filter set checkbox

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.

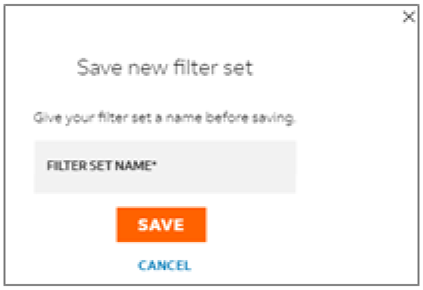


Save as new and Update filter set

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**.

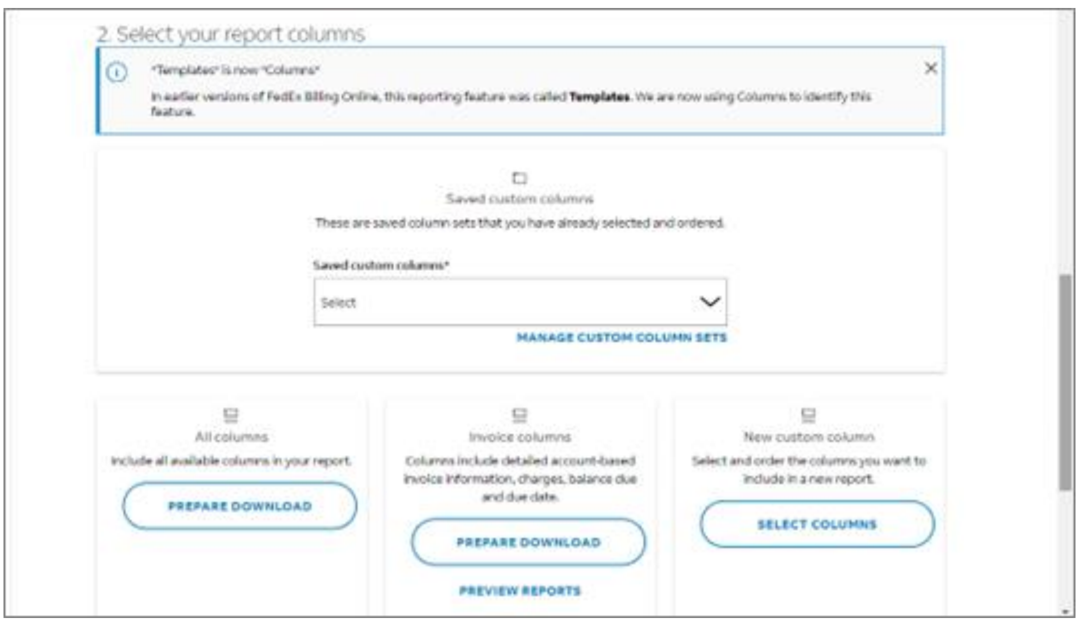


To update the existing filter set, click **Update filter set** option. The changes will be applied to the saved filter set.

Select your report columns:

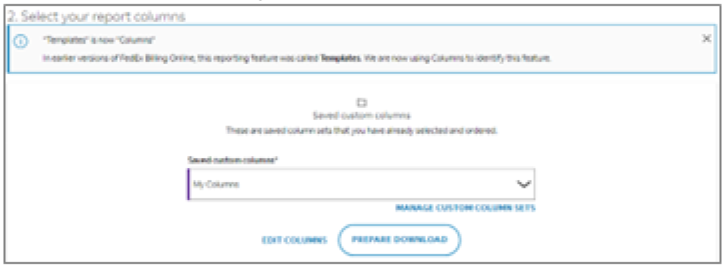
Under this section, there are four ways to select your report columns:

1. Saved custom columns
2. All columns
3. Invoice columns
4. New Custom column



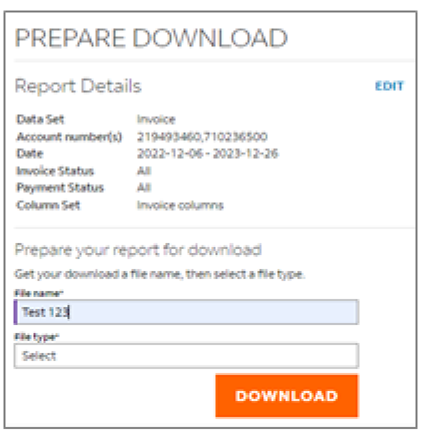
1. Saved custom columns

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



- **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**.

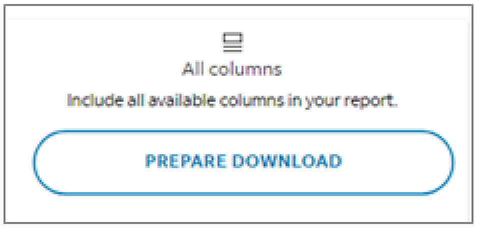
- **Edit columns**: To further modify the columns in the report. Click here to know more about editing the columns in the report.
- **Prepare Download**: To download the report, follow the below steps:
  - **Step 1.** Click **Prepare download** and it will direct you to the Prepare download page.
  - **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.



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

2. All columns

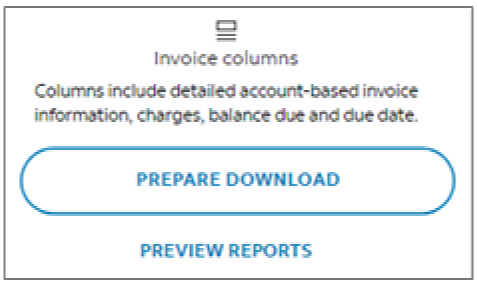
This option automatically includes all the columns available in the system into your report.



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

3. Invoice columns

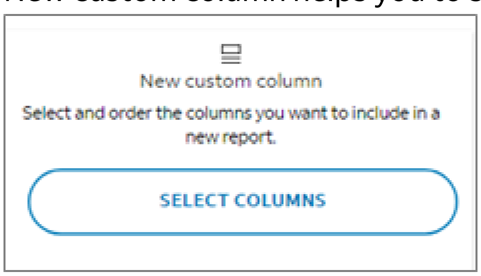
Invoice columns includes the detailed account-level information such as charges, balance due, due date etc., in the report.



- **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

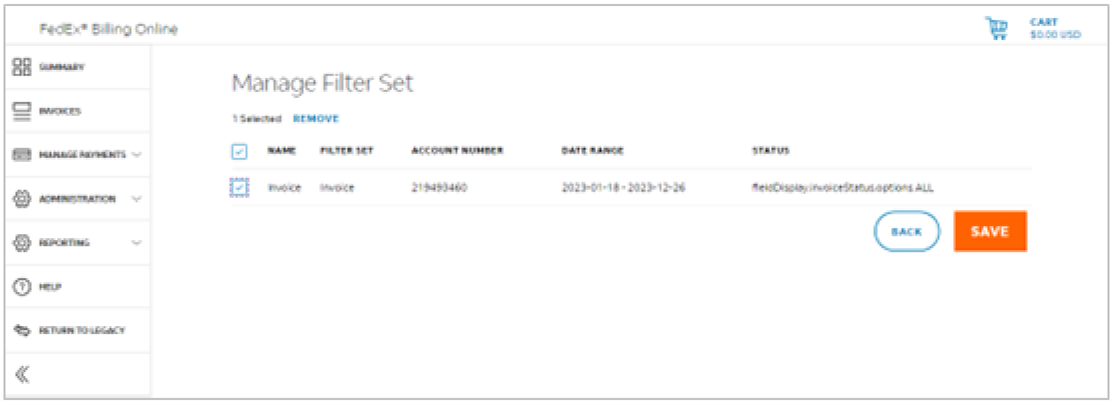
New custom column helps you to select the columns for your report.



- 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:

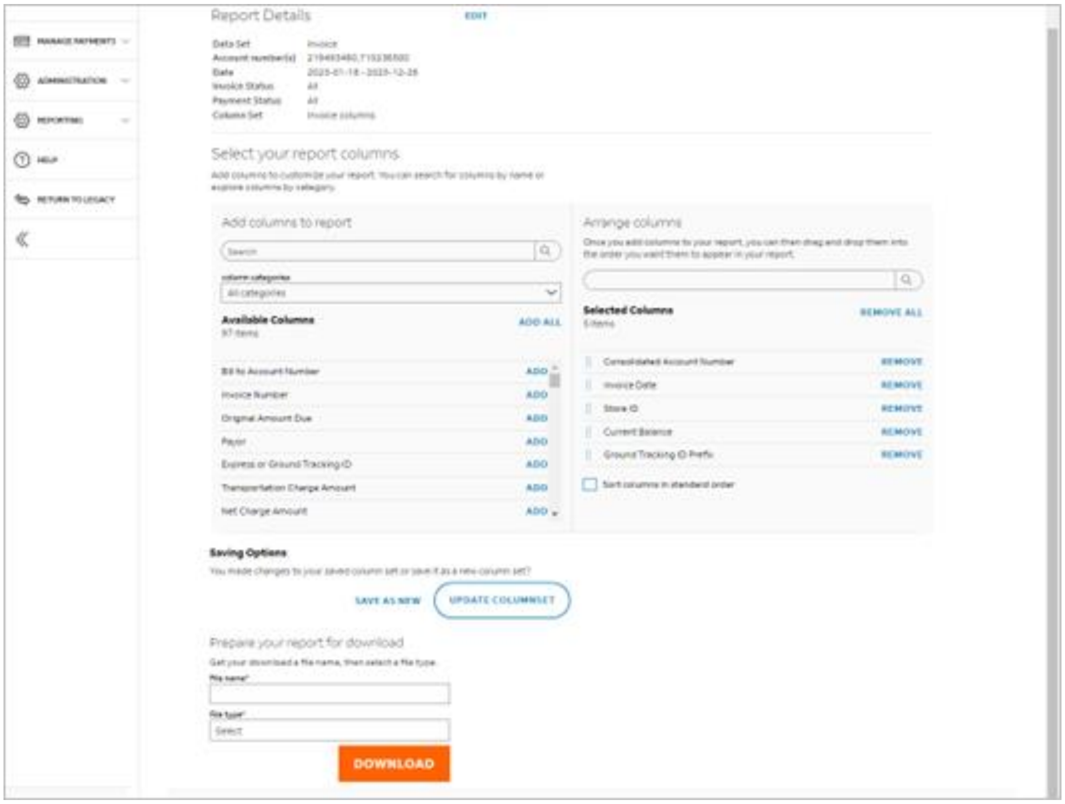
Available columns: This section displays the list of all the available columns to create a report.

- **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.



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**.

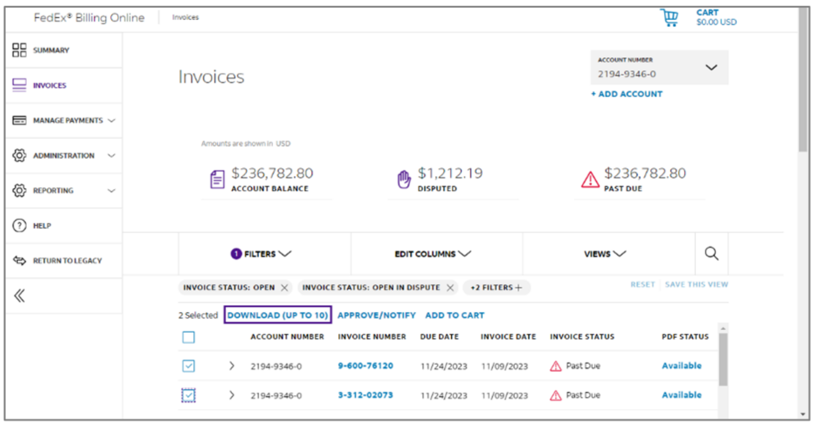
After selecting the required columns for the report, to prepare your report for download, enter a file name, select the file type from the drop-down, and click **Download**.

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

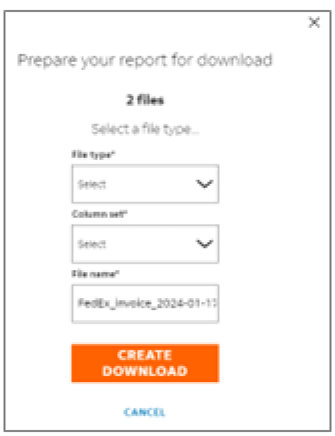
13.2. Download center

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.



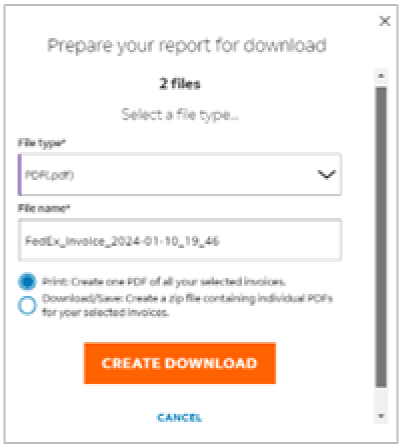
Step 3. There are five different file types available: PDF, Excel, CSV, Txt, XML. Select the required file type from the drop-down.

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.

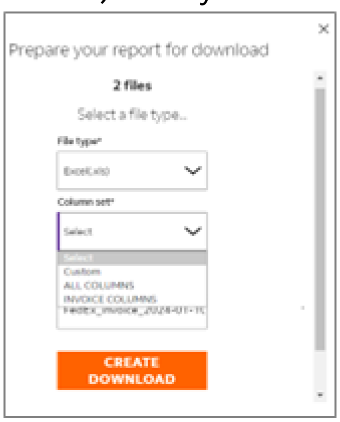
ii. **Download/Save: Create a zip file containing individual PDFs for your selected invoices**- A zip file will be created containing a group of PDFs which includes individual invoices in it.

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.

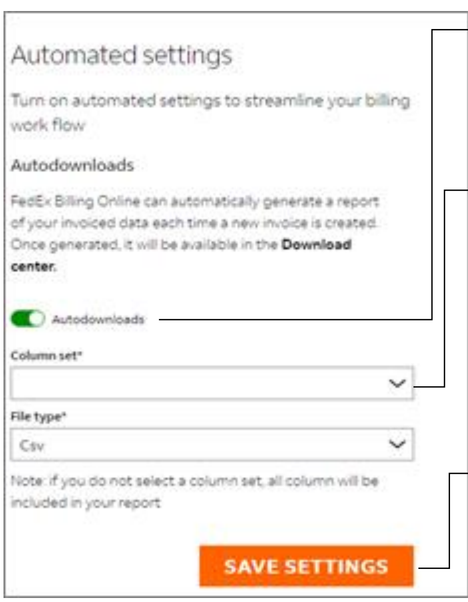
Step 5. Click **Create Download**, and it will direct you to the Download Center page.

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.

13.3. Automated settings

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



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.

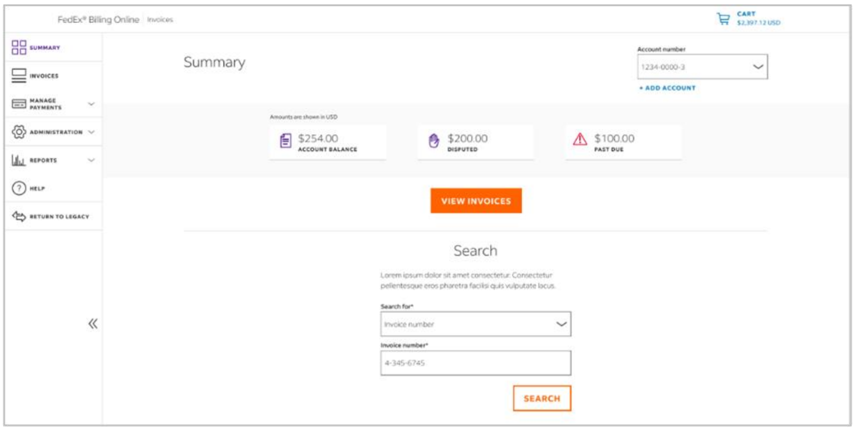
If the Auto downloads bar is toggled on, then you will be provided with Column set and Filter type drop-down option. Filter type drop-down is a mandatory field.
If no option is selected from column set option, then by default, all the columns will be included in the report.

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

SECTION - 14

14. 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
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

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**.