

FedEx New Account Setup Cheat Sheet

1. **Complete the FedEx Exception Form**

https://finance.umich.edu/system/files/FedEx_Exception_Form.pdf

- a. Submit form to strategicca@umich.edu
- b. Once the exception has been approved by Procurement Services, complete the following steps:

2. **Have a University of Michigan P-Card**

- a. To apply for a P-Card, see the P-Card web page for details: <http://www.finance.umich.edu/procurement/pcards>

3. **Request a new FedEx customer account number**

If you encounter difficulty establishing a new account contact Joe Kohler, Corporate Account Manager, for assistance at (800) 516-0477 or jpkohler@fedex.com.

- a. If you do not have a FedEx.com login ID and password, you can request a new account via phone or through FedEx.com. We recommend requesting a new account by phone at (800) GO-FEDEX.
- b. If you already have a FedEx.com login ID and password, request your new FedEx account via phone and then add the new account to your existing profile.
- c. Job aids for setting up new FedEx customer accounts are available here:
 - i. New account setup via phone:
http://www.finance.umich.edu/system/files/Fdx_New_Phone.pdf
 - ii. New account setup via www.fedex.com:
http://www.finance.umich.edu/system/files/Fdx_New_Web.pdf
- d. DO NOT USE YOUR NEW ACCOUNT YET

4. **Register for FedEx Billing Online**

- a. You must register for FedEx Billing Online to pay FedEx invoices via P-Card and obtain invoice detail to reconcile your P-Card statement. There are two different types of FedEx Billing Online:
 - i. Have a P-Card assigned to the FedEx customer account and establish a “**FedEx billing Online**” account. This way, FedEx invoices are automatically billed to the P-Card assigned to the FedEx account. Copies of FedEx invoices and backup reports can be downloaded from the FedEx website for P-Card reconciliation. FedEx billing online charges will show as line item billing on the P-Card statement.
 - ii. Have a P-Card assigned to the FedEx customer account and establish a “**FedEx billing Online Plus**” account. Similar to the first option, except the “plus” option allows the account holder to review and dispute charges before they are paid. FedEx Billing Online Plus will show as a summary billing line by invoice number on your P-Card statement.
- b. A job aid for registering with FedEx Billing Online is available here:
http://www.finance.umich.edu/system/files/Fdx_Billing.pdf
- c. DO NOT USE YOUR NEW ACCOUNT YET

5. **Register your new FedEx customer account number with E&I** (Educational & Institutional Cooperative Purchasing)

To obtain university discounts, register with E&I at: https://www.eandi.org/fedex/application_goblue.aspx.

- a. A job aid for using E&I's registration page is available here:
http://www.finance.umich.edu/system/files/Fdx_Eandi.pdf
- b. **Important** - Follow these guidelines!
 - i. Only the P-Card holder should register with E&I
 - ii. Only register your *NEW* account. Do not register FedEx ShortCode accounts
 - iii. Use the address on the card stock that came with your P-Card
 - iv. Enter the P-Card holder's information and submit the form
- c. DO NOT USE YOUR NEW ACCOUNT until you receive the e-mail confirmation that your account is linked to E&I pricing. Shipments prior to receiving the confirmation may be charged list rate.