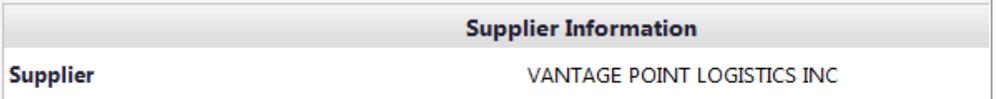
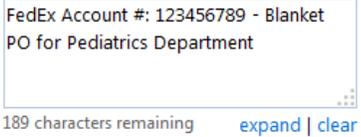


How to Buy FedEx Outbound

This guide describes how to create a purchase order for FedEx shipments. After creating a purchase order, you must reference this purchase order number on your shipping label. This guide also describes shipping label creation and how to reference your purchase order number on the label.

| Instructions on creating a VPL Purchase Order for FedEx Shipments | |
|--|--|
| Steps | Screenshots |
| <p>Navigate to the BearBuy Shopping Homepage.</p> <p>In the Forms for Specific Purchases section, click on the Outbound Freight (for FedEx shipments) icon to open the form.</p> |  |
| <p>The form has the Vantage Point Logistics (VPL) supplier pre-selected.</p> <p>The PO is issued to VPL because they will assist UCSF in handling POs and invoicing for FedEx shipments.</p> <p>There is no need to select the supplier on this form.</p> |  |
| <p>Navigate to the Product Description field and enter a description of your order.</p> <p>You must specify your FedEx account number.</p> <p>Each PO can only be associated with one FedEx account.</p> <p>If you have more than one account, you must generate a separate PO for each account.</p> | <p>In the Product Description field, you must enter your FedEx Account number in addition to your description.</p> <p>Product Description</p>  |

| | |
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| <p>In the Price field, enter the total estimated amount that you will be spending on FedEx shipping for the PO. To help estimate your spend, review past funding expenditure history with FedEx.</p> <p>The Quantity on this form is defaulted to 1. There is no need to specify a value.</p> <p>In the Commodity Code dropdown, select an appropriate value.</p> | <p>Price <input type="text" value="200.00"/></p> <p>Quantity 1</p> <p>Commodity Code <input type="text" value="00085 - Freight-Goods Trans-57101"/></p> |
| <p>Indicate if your PO is your FedEx account's default PO.</p> <p>The default PO will be charged for shipments where no PO is specified on the shipping label.</p> <p>Select Yes if the PO is your default PO. Select No if this is not your default PO. If you select No, ensure that you previously created a PO that is designated as your FedEx account's default PO.</p> | <p>Each FedEx account must have one default PO associated with the account. The default PO will be charged for shipments where no PO is specified on the shipping label.</p> <p>Is this PO your FedEx Account's Default PO? <input type="text" value="Yes"/></p> |
| <p>After completing the form, navigate to the Available Actions dropdown and select the Add and go to Cart option. Press the Go button.</p> <p>NOTE: Only ONE line (one form) per PO is allowed for VPL POs. No other lines (forms) are necessary.</p> <p>Do not mix this form with any other form or catalog/Punch-out item.</p> | <p>Available Actions: <input type="text" value="Add and go to Cart"/> <input type="button" value="Go"/></p> |
| <p>You are now in your BearBuy cart. Click the Proceed to Checkout button to continue checking out.</p> | <p><input type="button" value="Proceed to Checkout"/></p> |

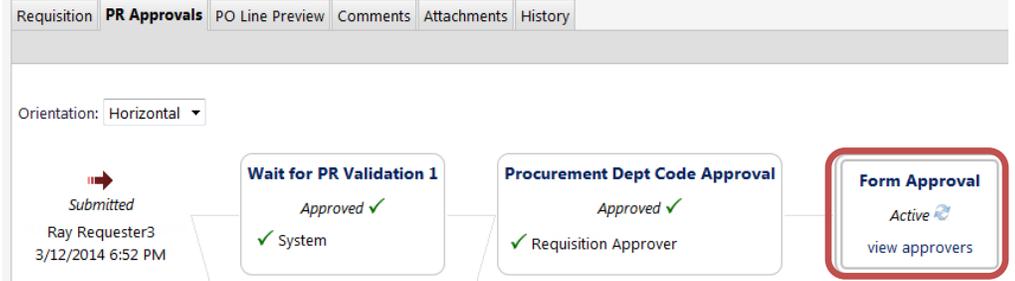
Once your cart is complete, place your order as you normally would.

All VPL POs for FedEx are reviewed by Supply Chain Management (SCM) department before your PO is generated to ensure your requisition was created properly.

To expedite the generation of your PO, ensure that your requisition is complete.

After SCM approves of your PO, your PO will be ready for use.

Please see the “Instructions on Creating Shipping Labels using FedEx.com” or “Instructions on Referencing POs on paper FedEx Labels” section of this guide for **important instructions on how to reference this PO on your shipping label.**



Notes about Invoices for FedEx Shipping

If you use VPL POs for your FedEx shipping, your shipment invoices will be sent **electronically to BearBuy** and applied to your PO.

You can access invoices applied to your PO by navigating to your VPL PO and clicking the invoices tab. All invoices applied to this PO will be listed and can be accessible.

Your invoice will list details of your shipment such as recipient, tracking number, etc.

No paper invoices will be sent to you.

PO/Reference No. **B000002300 Revision 0**

Supplier **VPL**

Status Purchase Order Revisions PO Approvals Shipments Receipts **Invoices**

Invoicing Summary

| Voucher No. | Supplier Invoice Number |
|--|-------------------------|
| 59000143  | 1456-400 |

Instructions on Creating Shipping Labels using FedEx.com

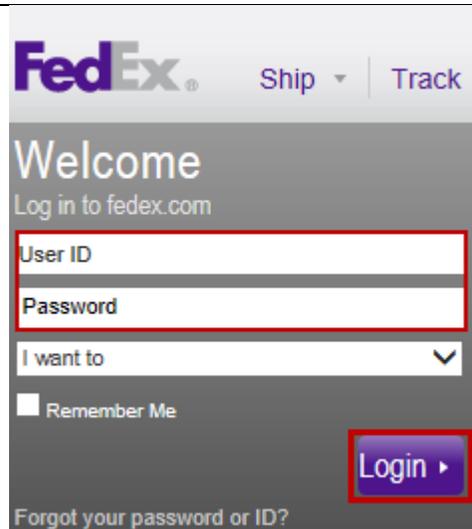
Steps

After creating your Purchase Order, you can create shipping labels using your existing FedEx.com login if you have one

Go to <http://www.FedEx.com>
(Choose United States if you are prompted to choose a country)

Enter your **User ID** and **password**
Press the **Login** button

Screenshots



In section **2. To**, fill out your recipient's **Contact name, Address, City, State, Zip** and **Phone No. (required)**.

Check address details are correct by clicking plus sign next to **Perform detailed address check** link.

2. To [Help](#) [Hide](#)

* Country/Location

Contact ID

Company

* Contact name

* Address 1

Address 2

* ZIP

* City

* State

* Phone no. ext.

[+ Perform detailed address check](#)

This is a residential address [?](#)

Save new recipient in address book

In section **3. Package & Shipment Details**, fill out the **Ship date, No. of packages, Weight, Service type**, and **Package type**.

3. Package & Shipment Details [Help](#) [Hide](#)

* Ship date [?](#)

* No. of packages

* Weight [?](#) lbs

Declared Value [?](#) U.S. Dollars

* Service type

* Package type

In section **4. Billing Details**, enter the **BearBuy PO number** in the **Your Reference** field.

Do not add any other text before or after the PO number.

4. Billing Details [Help](#) [Hide](#)

* Bill transportation to

* Your reference

[+ More reference fields](#)

In section 5. **Complete your Shipment**, click the **Ship** button.

5. Complete your Shipment

[Help](#)

Create a Shipment Profile to store recipient, package and all other details of this shipment for future use.

[Send a Mobile Shipping Label](#)

Save for later

Ship

A shipping label for your package is generated.

Click the **Print** button to print out the label.

Attach the label to package and send the package.

Ship | LTL Freight | Ship History | My Lists | Reports | Integration Manager

Prepare a shipment

1 Enter shipping information 2 Print label(s)

Thank you for shipping with FedEx. Your tracking number: 79685776526

Label
 Receipt | [View](#)

Print

Edit shipment Cancel shipment Repeat last Create new

From: UCSF
1855 Folsom Street
Suite 304
San Francisco, CA 94103

Origin ID: NDBA



Ship Date: 07OCT13
ActWgt: 1.0 LB
CAD: 4515265/INET3430

Delivery Address Bar Code



SHIP TO: (000) 000-0000
Jane Doe

BILL SENDER

120 MARKET ST
SAN FRANCISCO, CA 94111

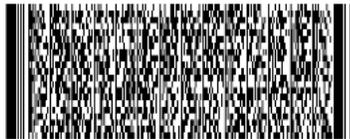
Ref # 10057A
Invoice #
PO #
Dept #

WED - 09 OCT AA
** 2DAY **

TRK# 7968 5777 6526
0201

SC APCA

94111
CA-US
SFO



STANDARD IMAGE

Tracking your package after it is shipped.

Click on the **Ship History** tab.

Click the **check box** next to shipped item(s) you want to track.

Click the **Track** button.

FedEx Ship Manager®

Ship | LTL Freight | **Ship History** | My Lists | Reports | My Profile

Shipping History

FedEx Express/FedEx Ground | FedEx Freight

Search in Ship date Go Display shipments for the past 10 days Per page 5 Page 1 of 1

| Ship date | Company | Contact name | Destination | Tracking Number |
|--|---------|--------------|--|-----------------|
| <input checked="" type="checkbox"/> 10/07/2013 | | Jane Doe | 120 MARKET STREET SAN FRANCISCO CA 94111 | 896854928549 |

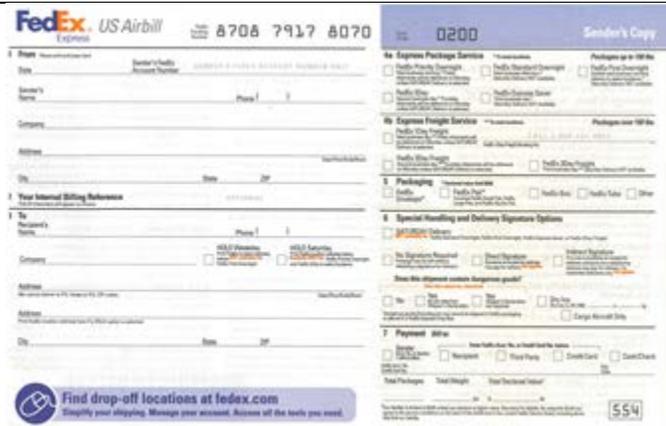
Copy to my shipment profiles | Cancel | Download | **Track** | View details | Reprint

Instructions on Referencing POs on paper FedEx Labels

Steps

If you normally ship using paper shipping labels/airbills, fill them out with the necessary information as you normally would.

Screenshots



In the **Internal Billing Reference** section of the form, always enter your PO number.

Do not add any other text before or after the PO number.

FedEx Express *US Airbill* FedEx Tracking Number 8708 7917 8070

From Please print and press hard.

Date _____ Sender's FedEx Account Number _____ SENDER'S FEDEX ACCOUNT NUMBER ONLY

Sender's Name _____ Phone () _____

Company _____

Address _____ Dept./Floor/Suite/Room

City _____ State _____ ZIP _____

Your Internal Billing Reference **B000123456**
First 24 characters will appear on invoice.

Attach the label to package and send the package.



Frequently Asked Questions

PO Setup Questions

Question:

How many POs do I need to create?

Answer:

This is up to your department. It is recommended that you create one PO for each separate funding source(s) you use for shipping.

If you used Speedcharts/SpeedTypes in the past, you can create one PO for each Speedchart/SpeedType used for shipping.

Question:

What dollar amount should I put

Answer:

The amount is determined by the department.

| | |
|---|---|
| <p>on my PO? How do I know how much my department spent on FedEx previously?</p> | <p>One tip is to review your past FedEx spend for your funds to estimate how much you spend on FedEx over time.</p> <p>The department should monitor this PO to ensure that it is not being overspent. If the PO is approaching the maximum amount on the PO, the department can submit a Change Order Request form to increase the dollar amount on the PO.</p> |
| <p>Question:</p> <p>Can you increase the dollar amount on my VPL PO each year?</p> | <p>Answer:</p> <p>Yes, this is done by submitting a Change Order Request form to increase the amount on the PO.</p> |
| <p>Question:</p> <p>Can I create more than one PO for the same FedEx Account?</p> | <p>Answer:</p> <p>You can create as many POs per FedEx account as you wish. You will want a different PO for every set of funding sources that you will use for shipping charges.</p> <p>If you were using Speedcharts/SpeedTypes for shipments, you can create a PO for every Speedchart/SpeedType that you were using.</p> |
| <p>Question:</p> <p>Can I add multiple Outbound Freight forms to a requisition and create a multiple lined PO? I would like to specify different funding for each line on the PO.</p> | <p>Answer:</p> <p>No. VPL POs should only be setup for one PO line. The one PO line can contain split funding. Each shipment charge will be divided by the funds specified for this line.</p> <p>If you have different sets of funding for your shipments, create one PO for each different set of funding.</p> |
| <p>Question:</p> <p>If I create multiple blanket POs, how does my department shippers know which one to use?</p> | <p>Answer:</p> <p>You can communicate to your users which POs should be referenced under which circumstances.</p> <p>One tip is to create a simple table to indicate what funds are specified on each PO. If users need to verify which funds are used on a PO, they can find the PO in BearBuy and view the funds (as long as they do not have a Shopper role).</p> |
| <p>Question:</p> <p>Do I need to create a PO for every single package that will be shipped out?</p> | <p>Answer:</p> <p>No. FedEx POs are blanket POs that cover multiple shipments over time. While it is possible to create a PO for every FedEx shipment, it is not the recommended.</p> |

| Default PO Questions | |
|--|---|
| <p>Question:</p> <p>Must I create a Default PO?</p> | <p>Answer:</p> <p>Yes. Each FedEx account must have one Default PO. Any requisitions created for FedEx accounts that do not have a designated Default PO will not be approved until a Default PO has been submitted.</p> |
| <p>Question:</p> <p>Do I need a Default PO for each of my funds?</p> | <p>Answer:</p> <p>No. You only need 1 default for each FedEx account that you have.</p> |
| <p>Question:</p> <p>What dollar amount should I put on the Default PO?</p> | <p>Answer:</p> <p>This is determined by the department.</p> <p>Keep in mind that the Default PO is charged for FedEx shipments that do not have a valid PO referenced. If the department shippers will always reference a valid PO number, then the referenced PO would be charged, not the Default PO. If department shippers may often forget to reference a PO, then the Default PO will be charged more often and a higher amount may need to be specified on the Default PO.</p> <p>The department can specify an estimated amount and closely monitor the PO to determine if there are many charges on the PO. The dollar amount can always be changed using the Change Order Request.</p> |
| <p>Question:</p> <p>Do Default POs expire? Is there a requirement to create new default POs each year?</p> | <p>Answer:</p> <p>No, we do not impose any time limits for VPL POs. These POs will remain open as long as the department does not ask us to close the PO OR if there are remaining funds remaining on the PO.</p> <p>Supply Chain Management (SCM) and VPL will note this PO as the specified FedEx Account number's default PO unless the department issues a new default for the account</p> <p>The department should always monitor the remaining balance of their VPL POs to ensure that they are not fully invoiced. If the PO is close to being fully invoiced, a Change Order Request Form can be submitted to increase the amount on the PO.</p> |

| | |
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| <p>Question:</p> <p>We have one FedEx account with multiple people shipping with the account. Does each person need a separate Default PO?</p> | <p>Answer:</p> <p>No. Each FedEx account needs only one Default PO. This Default PO is used to catch any shipments that were sent without a valid PO referenced for your account. Each person that uses the account can optionally create their own PO to reference on shipments, particularly if each person uses different funding for these shipments.</p> |
| <p>Question:</p> <p>Can I use one PO as my Default PO and use it for all my shipping if I have only one funding source to charge shipments to?</p> | <p>Answer:</p> <p>Yes. If you always use one set of funds to charge your shipment costs, you can create one PO to serve as your default PO and use it for shipping.</p> <p>You will want to be careful to monitor this PO to ensure that it has enough remaining funds to cover your all your shipping costs. If the PO is close to being fully invoiced, submit a Change Order Request form to increase the dollar amount on your PO.</p> |
| <p>FedEx Account Questions</p> | |
| <p>Question:</p> <p>I don't currently use FedEx for shipping. How do I setup an account?</p> | <p>Answer:</p> <p>If you do not have an account number because you were not using FedEx for shipping previously, call FedEx at 800-645-9424 to obtain an account number.</p> <p>If you have an existing FedEx account number(s), you do not need to create a new one. You can create POs for your existing FedEx account number(s)</p> |
| <p>Shipping Questions</p> | |
| <p>Question:</p> <p>Can I reference the PO number anywhere on my shipping label?</p> | <p>Answer:</p> <p>No. You must reference your PO number in the Reference (or Your Internal Billing Reference) field of your shipping label.</p> <p>If you do not reference the PO number in the appropriate field, your Default PO will be charged for the shipment.</p> |
| <p>Question:</p> <p>Can I reference the PO and include additional notes in my</p> | <p>Answer:</p> <p>No. You must only reference your PO number in the Reference (or Your Internal Billing Reference) field of your shipping label.</p> |

| | |
|---|---|
| shipping label's reference field? | If your default PO is not recognized, your Default PO will be charged for the shipment. |
| Question: When the PO is created, will the PO generate a shipping label and notify FedEx to pick up the package? | Answer: No. Creating POs for FedEx shipping does not change the way you create shipping labels and arrange for your package pick up. The PO is a blanket order to allow departments to associate their shipments with the appropriate funding to charge the shipment to. |

| | |
|--|---|
| Contact Information for Questions | |
| FedEx Contact | <p><u>FedEx customer service related inquiries</u> Or tracking, tracing, and claims on packages and supplies: 800-463-3339 (800-GO-FEDEX)</p> <p><u>Other useful numbers</u> Billing Inquiries: 800-645-9424 International Customer Service: 800-247-4747 FedEx.com Technical Support: 877-339-2774</p> |
| UCSF Contact | For questions on FedEx, contact Supply Chain Management (SCM) at bearbuy@ucsf.edu |