How to transfer your Recipient Address Book from FedEx Ship Manager at fedex.ca to FedEx Ship Manager Software

There are three phases to completing the transfer process.

Phase I Export and format your Recipient Address Book.

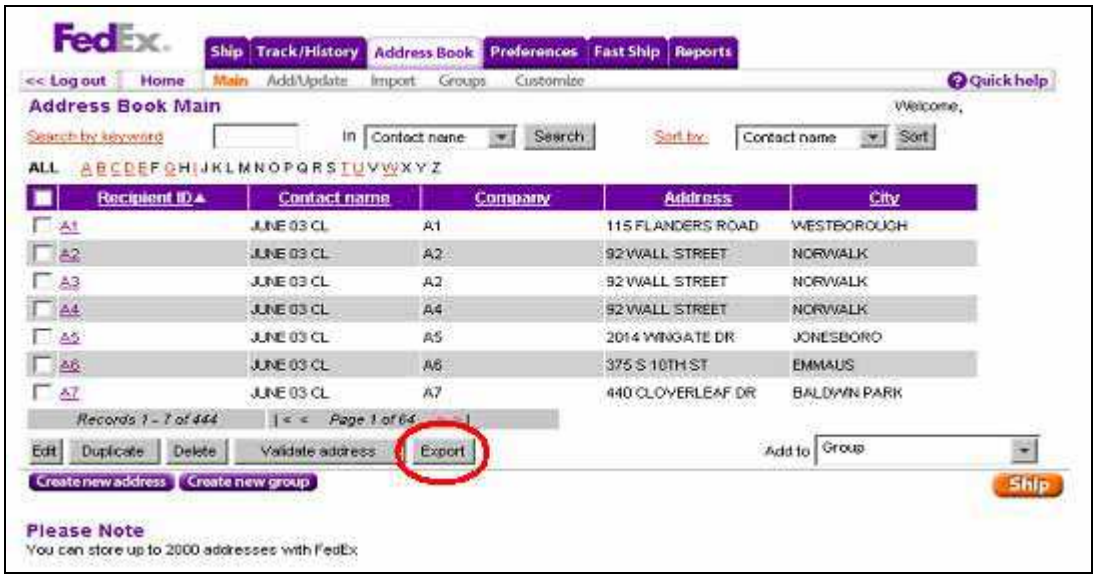
Phase II Create an IMPORT template in FedEx Ship Manager Software.

Phase III Import your Recipient Address Book using your new IMPORT template.

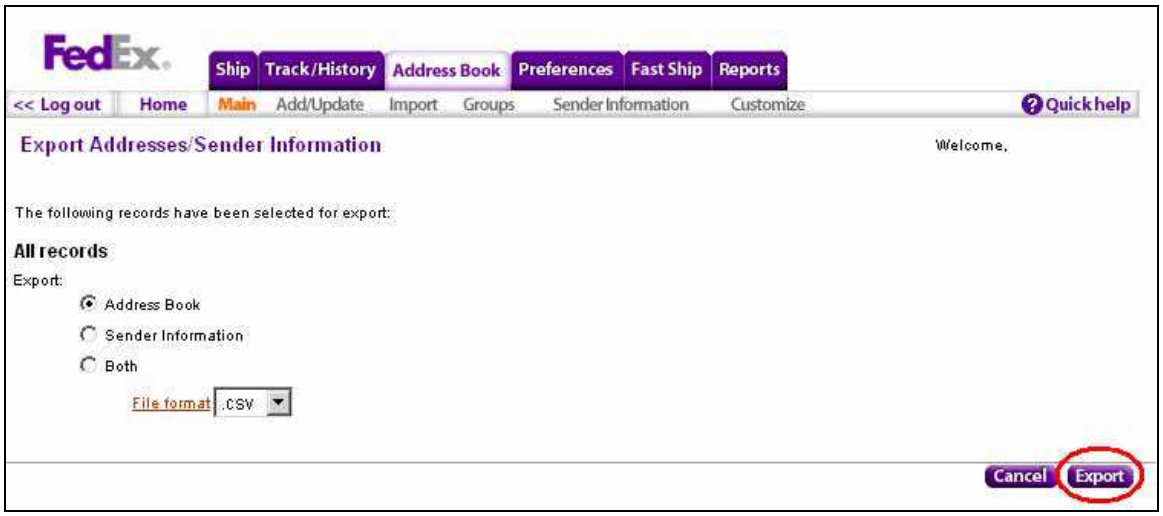
Phase I Export and format your Recipient Address Book.

The first step is to export your address book (recipient database) from FedEx Ship Manager at fedex.ca

Step 1 Log into FedEx Ship Manager at fedex.ca.
Step 2 Insert a blank 3 _" diskette in the a: drive
Step 3 Click on the "Address Book" tab.
Step 4 Click the "Export" button at the bottom of the screen, see image below.



Step 5 The screen image below should appear. Click the Export button at the bottom of the screen.



Step 6 The "Save as.." screen appears.

- For the "Save in" field, select the 3 _" Floppy (A).
- For the File Name "FedExABExport.csv" appears. You may change the name. **Note: Be sure to keep the file in .csv format.**
- Click "Save"
- Click "OK".

Step 7 Open Excel and then open the file "FedExABExport.csv" from your 3 _" Floppy (A) drive.

Step 8 Update your spreadsheet with the recipient address information in the following manner:

Delete the following columns. These columns cannot be imported to FedEx Ship Manager Software and will create errors when you attempt to transfer your address book.

First Name
Last Name
Title
Department
Pager Number
Mobile Phone Number
Verified Flag
Accepted Flag
Valid Flag
Reference Description
Service Type Code
Package Type Code
Collection Method Code
Bill Code
Duty Bill Code
Currency Type Code
Insight ID Number
Ground ReferenceDescription
Ground ShipAlert Flag
Ground ShipAlert Recipient Fax Number

Ground ShipAlert Recipient Email
Partner Type Codes
NetReturn Bill Account Number
Customs ID Type Code
Address Type Code

Step 9 Review the column headings to verify that they appear in the order listed below and do not include any of the columns to be deleted, as described above. Displaying the columns differently will result in errors when attempting to import your address book.

Column 1	Nickname
Column 2	Full Name
Column 3	Company
Column 4	Address One
Column 5	Address Two
Column 6	City
Column 7	State/Province
Column 8	ZIP/Postal Code
Column 9	Phone Number
Column 10	Extension
Column 11	FAX Number
Column 12	Country Code
Column 13	Email Address
Column 14	Residential Flag
Column 15	Customs ID EIN
Column 16	Bill Account Number
Column 17	Duty Bill Account Number
Column 18	ExpressShipAlertSenderEmail
Column 19	ExpressShipAlertRecipientEmail

Step 10 If you wish to save your changes:

Click “File” and “Save” as the same file name.
Click “Yes” to replace the existing file.
Click “Yes” again, to keep the workbook in this format.

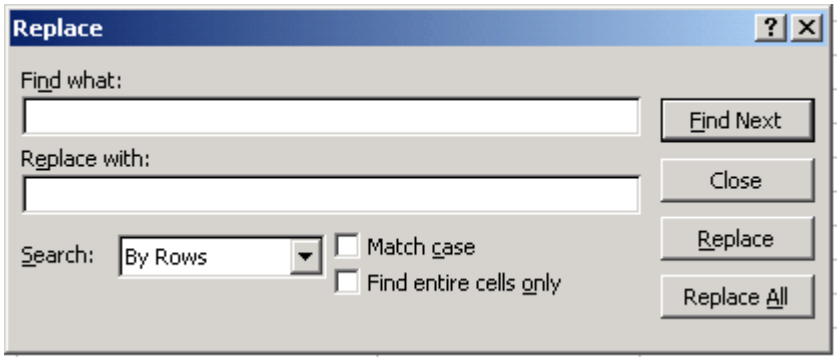
In order to avoid errors at time of import some important changes will first need to be made to the format in which the address book information is displayed in your spreadsheet.

Step 1 The following symbols must be removed from your address book. These symbols will create errors when importing your file in (.csv) format:

1 - The Comma	,	(Remove from the entire spreadsheet)
2 - The Semi-colon	;	(Remove from the entire spreadsheet)
3 - The Colon	:	(Remove from the entire spreadsheet)
4 - The Apostrophe	‘	(Remove from the entire spreadsheet)
5 - The Hyphen	-	(Remove from the entire spreadsheet)
6 - The Period	.	(Remove from all columns, except the e-mail field columns)

You must remove each symbol listed from your database one at a time in the following manner:

i) Click and to select the entire spreadsheet or the columns of the spreadsheet you wish to edit. You may click on the cell in the top left corner to highlight if you wish to edit the entire spreadsheet.
ii) Click "Edit" and select "Replace…" from the drop down menu. The "Replace" pop-up window will appear (see below).



iii) In the "Find what" field. enter one of the listed symbols to be removed.
In the "Replace with" field, enter a blank space by pressing the space bar if you wish to replace the symbol with a blank.

iv) Click on the "Replace All" button.
Follow the above steps to remove the listed symbols from the spreadsheet or appropriate columns.

Note: Be careful not to remove the period symbol "." from the columns listing your e-mail addresses. If you do, you may replace the period symbols by reversing the process explained above and replace a space with a period for the e-mail field columns you select.

Step 2 When U.S. Zip Codes are exported from FedEx Ship Manager at fedex.ca, the first digit may be removed, if it is a zero "0". The "0" must be restored to the Zip Code(s) or an error will occur when you attempt to import your Recipient Address Book:

To restore the ZIP code to its original format follow the steps below:

i) Click on ZIP/Postal Code column to highlight this column.
ii) Click on Format from the main menu bar, then select "Cells" from the drop down menu.
iii) Select "Special" from the Category list
iv) Select "Zip Code" from the type list
v) Click OK.

Note: This task will need to be repeated if you retrieve the address book file and wish to save the Zip Code information again in its corrected format.

Step 3 Account Number Information:

Review the list "Bill Account Number" on your spreadsheet and confirm your sender account is listed in the column, where a recipient or 3rd party account is not already provided. Confirm that the accounts are valid. Remove or correct any incomplete account numbers. A blank "Bill Account Number" field will result in an error.

Review the list "Duty Bill Account Number" on your spreadsheet. The Duty Bill Account Number field must be left blank if no account number is provided. An invalid or incomplete account number will result in an error.

Step 4 Save your changes:

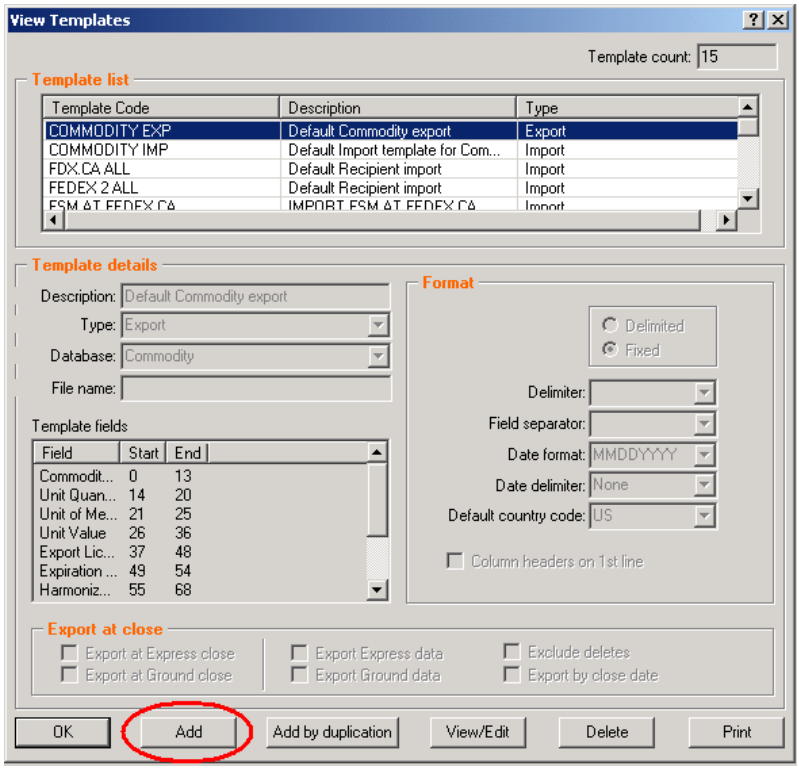
Click "File" and "Save" as the same file name.
Click "Yes" to replace the existing file.
Click "Yes" again, to keep the workbook in this format.

Phase II Create an IMPORT template in FedEx Ship Manager Software.

You are now ready to create the IMPORT template in FedEx Ship Manager Software

The first step in importing or exporting data is creating or selecting a template. The recipient data fields in your import template must be displayed in the same order as the columns in your spreadsheet.

Step 1 Launch FedEx Ship Manager Software
Step 2 From the "Databases" from drop down menu, select "Templates"
Step 3 The "View Templates" pop up page is displayed.
Step 4 From the "View Templates" Pop-up page, click the "Add" button



Step 5 In the Add Template Pop-up page complete the available fields in the following manner:

i) For the Template ID, enter a template name (i.e. "RECIPIENT 3 IMP").
ii) For the Description, enter a description (i.e. "FEDEX.CA RECIPIENT IMPORT").
iii) For Type, select "**Import**".
iv) For Database, select "**Recipient**".
v) For Format, select "**Delimited**".
vi) In the Delimiter field select "**None**".
vii) In the Field Separator field select the comma "**,** ".
viii) Select the Default country code as "**CA-Canada**"
ix) Check the box to indicate "**Column headers on 1st line**".

Step 6 You must now select the required fields for the Import template. Click on each "Description" name from the Database fields list below (i.e. Recipient Code) then click "Add" in order to add it to the "Template fields" list:

Note: The fields listed below must be added in the same order described below. Listing the fields in any other order will result in errors when attempting to import your address book.

Follow these steps to create your first field "Recipient Code" in your import template.

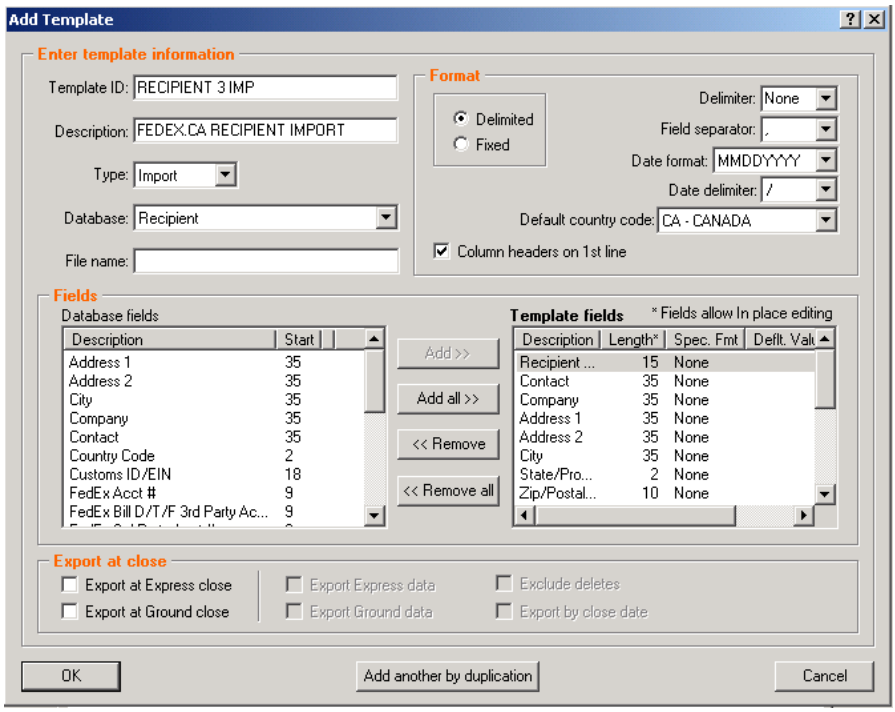
i) Scroll down the "Description" names until you see the name "Recipient Code". The list is displayed in alphabetical order.
ii) Click on "**Recipient Code**" so that it is highlighted.
iii) The "Add>>" button is now activated. Click the "**Add>>**" button.
iv) The "Recipient Code" field should now appear as the first item in the "Template fields" list, just to the right of the "Database fields" list.

Continue to add each of the required fields in the order provided below.

1- Recipient Code – Process to add this description is provided above
2- Contact
3- Company
4- Address 1
5- Address 2
6- City
7- State/Province
8- ZIP/Postal Code
9- Phone Number
10- Phone Extension
11- Ship Notify Fax Number
12- Country Code
13- Shipment Notify E-mail ID-1
14- Residential/Commercial Flag
15- Customs ID/EIN
16- FedEx Acct#
17- FedEx Bill D/T/F 3rd Part Acct#
18- Shipment Notify E-mail ID-2
19- Shipment Notify E-mail ID-3

Step 7 Carefully review the "Template fields" list on the screen with the list above and verify that the list is identical.

The "Add Template" screen should now look like this:



Note: If you need to make a correction, you can "Add" a database field by clicking on the database field you wish to add. Next, click on the template field immediately above the space you wish to add the database field, click "Add". If you wish to remove a "Template field", simply click on the field and click "Remove". If you have no further changes, continue to the next step.

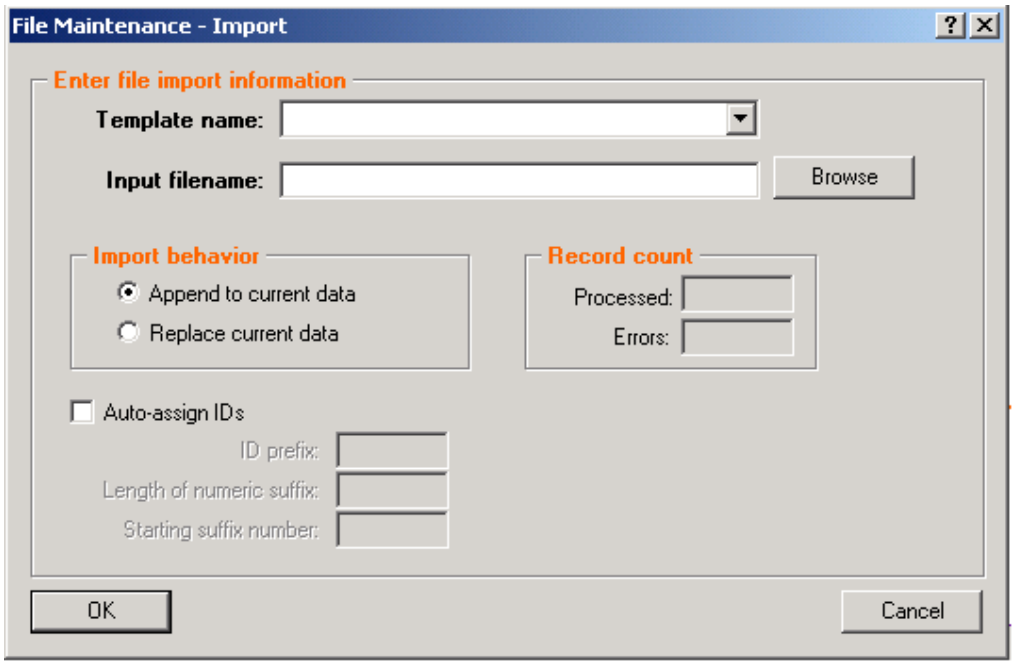
Step 8 To save your template and close the "Add Templates" Pop-up page, click OK.
Step 9 To close the "View Templates" Pop-up page, click OK.

Phase III Import your Recipient Address Book using your new IMPORT template.

You are now ready to Import your Recipient Address Book

Step 1 Save and Close your Excel file Spreadsheet. If the file is open, the file cannot be accessed during the import process.
Step 2 From the FedEx Ship Manager Software "Databases" drop down menu, select "File Maintenance" and then "Import".

Step 3 The "File Maintenance – Import" pop-up page appears (see below).



Step 4 Select the Template name "RECIPIENT 3 IMP" from the drop down menu.
Step 5 For the Input Filename, enter a:\ followed by the default import file name, or click the Browse button and click "Open" to select the import file (i.e. FedExABExport.csv ").
Step 6 Select to "Append to current data".
Note: If you wish to replace your address book with the database you are importing, then select "Replace to current data".
Step 7 Click "OK". The system notifies you when the import is complete.
Step 8 Select the database from the Database menu and view the data.

That's it !!

Troubleshooting

If a specific file does not import correctly or produces an error then it will not appear in your FedEx Ship Manager recipient database.

Select the option to list the error(s) and copy and paste this to a word document for reference so that you can identify these recipients on the import database (spreadsheet). You may then review each line to find any problems or issues with a particular recipient address line. A long list of similar errors may be attributed to an error in your template or spreadsheet. Review the instructions above to verify that all of the columns and fields required are listed in the order described. Also review the lines on your spreadsheet that demonstrate errors and confirm that no special characters have been inserted into the recipient information that may interfere with the import process. In some cases, special characters or symbols in certain columns may result in an error.

Note: A reference to line 2 represents the 2nd recipient address but the 3rd row of information on your spreadsheet.

Make any needed changes to the excel spreadsheet , save the changes and re-attempt to import the same file. This process can be repeated until all files are successfully imported.

Note: When you attempt to re-import the same recipient information, you must select the "**Replace**" option on the "File Maintenance – Import" screen to accept the changes. This feature will replace the recipient information in your database if it is changed for a given Recipient Code. If you only have a few errors and are unable to identify the source, you may choose to manually re-enter these addresses directly into your recipient address book.

Contact Us

If you have any questions, please call 1.877.853.4485 option 2 and select the option for Technical Support for FedEx Ship Manager Software.