Step 1: Contact Accounts Payable

Email **FNSV-Accounts-Payable@arizona.edu** to obtain the requirements for establishing a new account with FedEx. You will receive instructions via email on the steps to contact the FedEx Government division to establish an account via phone.

 1a. After you receive the email from Accounts Payable, you will:

* Contact FedEx Government accounting to request a new shipping account. (email will be provided by Accounts Payable) In your email, you will Identify yourself with the University of Arizona and provide the necessary information (phone number, billing address, department name)
* You will receive an email from FedEx with an attached form. You will provide Company Name, Address, Contact First/ Last Name, E-Mail address, Phone Number, Billing Information: Address, Phone Number and E-Mail.
* Send the completed form back to FedEx
* FedEx will send an email with your new account number and the following information:
	+ Rates will become active on the account within 3 business days
	+ New Customers are encouraged to visit the New Customer Center for information about locations, services, supplies, and much more: <https://www.fedex.com/en-us/get-started.html>
	+ Register your account with the attached instructions:
	+ Start shipping, invite users, run reports, and much more as outlined in the attached FedEx Administration User Guide!

Step 2: Create a Shipping Account eDoc

Once the new FedEx account has been provided by FedEx, a Shipping Account eDoc is required to record the new account and associate it with the University of Arizona to receive the associated discounts.

Log into UAccess Financials > type SHIP in the search box and click on Shipping Account.

Click the Create New button (upper right corner) and complete the following fields:

* **Document Overview:**
	+ **Description**: Enter a brief description to identify the use of the new account. Ex: "New FedEx Acct Dr. X Lab."
	+ **Explanation**: Highly recommended to use for the UA Business purpose for the ship account. Ex: "New lab for Dr. X to perform research, ship materials and obtain data from peers."
	+ **Organization Document Number**: Use at the discretion of the department.
* **Edit Ship Settings:** (\* = required field)
	+ **\*Shipping Account Number:** Enter the NEW FedEx account that was provided by the FedEx representative.
	+ **\*Contact Principal Name:** Enter NetID of primary responsible person for the FedEx account, or click on the magnifying glass to search for the individual to contact for questions regarding the department FedEx Account. Only one person can be listed at this time.
	+ **\*Chart Code:** Enter UA or click on the magnifying glass and select chart code.
	+ **\*Account Number:** Enter the UAccess Financials account number that all FedEx charges will be expensed or click on the magnifying glass to search for the account.
	+ **Sub-Account Number:** If a sub-account is associated with the FedEx shipping charges, enter it here.
	+ **\*Object Code:** Should be 3870.
	+ **Sub-Object Code:** If a sub-object code is associated with the FedEx shipping, enter it here.
	+ **Project Code:** If a project code is associated with the FedEx shipping, enter it here.
	+ **Organization Reference Id:** Leave blank.
	+ \***Shipping Company**: Click on drop-down arrow and select FedEx.
	+ **Shipping Account Active Indicator:** This checkbox indicates this is an active account. When the checkmark is removed the account is/should be closed. FedEx will be notified by Accounts Payable to close the account and remove it from the weekly EDI FedEx File.
* **Notes and Attachments Tab:** Not required. However, if you have additional information this can be added here. NOTE: Accounts Payable uses this field to keep you informed of any additional actions taken or required and will Ad Hoc route the document as a communication tool.
* **Ad Hoc Recipients:** Not required, although user can Ad Hoc route as needed.
* **Route Log:** The required approvers and routing of the changes and audit trail of the approval of the changes.
* **Review Entries:**
	+ Click **Submit** button to submit your changes
	+ Click **Save** button to save changes and come back to them
	+ Click **Close** button to close the document without saving
	+ Click **Cancel** button to cancel the document if no longer required

Step 3: Submit your eDoc

Document routes to Accounts Payable and required action is taken to open and close FedEx accounts.

* NEW Accounts: Accounts Payable works directly with the FedEx Representative to authorize the FedEx account to be added to the University primary account. This also adds the account to the weekly EDI (Electronic Data Interchange) billing file and reduces paper invoices.
* CLOSE Account: Accounts Payable notifies FedEx to REMOVE the account from University billing and close the account for any potentially fraudulent activity.
* Any actions taken by Accounts Payable are recorded in the Notes and Attachments tab.

Contact Accounts Payable at 520-621-9097 or **FNSV-Accounts-Payable@arizona.edu** if you need additional assistance.