

D.I.Y. PARCEL AUDIT & REFUND RECOVERY GUIDE

Step-By-Step Guide To Recover Your Refunds



 Lojistic®

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IDENTIFY YOUR ERRORS

Important Notes

- Use your free Lojistic account to automatically identify all errors and potential refunds on your shipping invoices. The potential refunds for any period of time can be downloaded from the “Audit & Refund Recovery” perspective by clicking the “Download Errors” button.
- Late shipment refund requests must be submitted to the carrier within two weeks of delivery in order to be considered.
- All other error types (other than late shipments) must be identified and submitted to the carrier within six months in order to be considered.

BEST PRACTICE TIP

Schedule a weekly “potential audit recovery” report and chase late shipment refunds immediately. For all other error types (other than late shipments), it's best to wait at least 4 full weeks for your Lojistic account to audit and identify all the errors. Certain error types (i.e. late payment fee, never delivered, billed but not shipped, etc.) are identified by your Lojistic account two, three or even four weeks after the charge appears on your invoice.

For example, if this week is October 1 - October 7, you should skip back 4 weeks and run a report for the prior 4 weeks.

In this example, the report you should run would be for August 6 - September 2.
Repeat this process every 4 weeks.

- October 1 - October 7 (This week)
- September 24 - September 30 (Skip)
- September 17 - September 23 (Skip)
- September 10 - September 16 (Skip)
- September 9 - September 3 (Skip)
- September 2 - August 27 (INCLUDE)
- August 20 - August 26 (INCLUDE)
- August 13 - August 19 (INCLUDE)
- August 6 - August 12 (INCLUDE)

- If you are denied a refund via the first filing method...be prepared to file any one potential late shipment refund request via all three filing methods...sometimes the third method is the charm!

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RECOVER YOUR REFUNDS

FILING ONLINE

Important Notes When Filing Online

- “Late shipment” refund requests are the only type of refund that can be filed online. All other invoice issues must be filed via billing support (aka human phone operator...see below).
- UPS and FedEx do not allow for “bulk refund requests” online.
- High value/expensive shipments (\$2,500+) will never be approved through the web (they must be filed over the phone with billing support/human operator).
- If there are any exceptions (i.e. weather delay) related to a late shipment, the refund request will be impossible to get approved online, even if the exception is invalid or minor (i.e. customs delay).

How To File Online



UPS Web Filing (UPS Billing Center)

1. Log in to your UPS Billing Center account online
2. Navigate to the UPS Billing Center home page
3. Navigate to the UPS refund filing page
4. Fill out form and submit



FedEx Web Filing (FedEx Billing Online)

1. Log in to your FedEx account online
2. Navigate to “View & Pay Bill”
3. Select the primary account associated with the disputed charge
4. Search for the tracking ID in the Quick Search
5. Click the tracking number in search results
6. At the bottom of the page, click the “Dispute” button
7. Fill out and submit dispute form

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RECOVER YOUR REFUNDS

FILING VIA AUTOMATED PHONE SYSTEM

Important Notes When Filing Via Automated Phone System

- “Late shipment” refund requests are the only type of refund that can be filed via the automated phone system. All other invoice issues must be filed via billing support (aka human phone operator...see below).
- For reasons unexplained, the UPS and FedEx automated phone systems aren’t always available. If you call and the system is closed/unavailable, wait an hour or two and try again.
- If there are any exceptions (i.e. weather delay) related to a late shipment, the refund request will be impossible to get approved via the automated phone system, even if the exception is invalid or minor (i.e. customs delay).
- UPS/FedEx automated phone system refund approvals are inconsistent. Only “really” late shipments with no carrier exceptions (aka excuses for the delay such as weather) have a chance at being approved via the automated phone system.

How To File Via Automated Phone System



UPS IVR (automated phone system)

1. Call: 800-742-5877
2. Follow the prompts to submit the disputed charge



FedEx IVR (automated phone system)

1. Call: 800-622-1147
2. Follow the prompts to submit the disputed charge

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RECOVER YOUR REFUNDS

FILING VIA BILLING SUPPORT (Human Phone Operator)

Important Notes When Filing Via Billing Support

- Usually the wait time to get a carrier representative on the phone ranges from a couple minutes up to 30 minutes. During the holidays, they are busier and it can take up to an hour.
- UPS/FedEx will resolve a limited number of refund requests per call (generally, 5 to 10 requests per call). Multiple calls will be required to resolve a long list of refund requests.
- For many invoice issues, the carrier's phone operators will need to be educated on "why" the charge is erroneous and deserving of a refund. The more educated you are on the nuances of the carrier's operations, billing mechanics and service guide...the more successful you will be in defending your refund request.
- It's pretty typical for bigger refund requests to require authorization from a supervisor before they are actually approved.

How To File Via Automated Billing Support



UPS Billing Support

1. Call UPS Billing Support: 800-811-1648
2. Wait (and wait...and wait...) until a representative is available
3. Explain issue to the representative and work with them to get your refund approved.



FedEx Billing Support

1. Call UPS Billing Support: 800-622-1147
2. Wait (and wait...and wait...) until a representative is available
3. Explain issue to the representative and work with them to get your refund approved.

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VERIFY YOUR REFUNDS

Important Notes About Verifying Your Refunds

- DON'T SKIP THIS STEP!!!
- You've put in the work to get your refund requests approved...now make sure that your credits actually get applied to your account. Sometimes you'll need to do additional follow-up with UPS/FedEx after you've received an approval (online, in automated phone system and/or from billing support).

How To File Verify Your Refunds



Verify UPS Refunds

1. Refunds are “confirmed” when they appear as a credit on one of your future invoices.
2. You'll want to keep track of your “approved” refunds and verify that the credits actually show up (on a future invoice). Sometimes UPS will “approve” a refund request online or over the phone but the actual credit never shows up (in which case you'll need to call them again).



Verify FedEx Refunds

1. Log in to your FedEx account online
2. Navigate to “View & Pay Bill”
3. Select the primary account associated with the disputed charge
4. Search for the invoice number in the Quick Search
5. Click “View Invoice History”
6. Check the dispute and adjustment history table to see if the refund has been credited
7. If the credit doesn't show up after a week, an additional call to FedEx is required. You may need to restart the process with a new credit request.

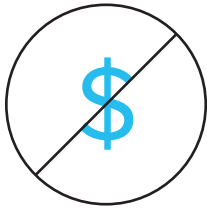
CREATE YOUR FREE LOJISTIC ACCOUNT

Audit your UPS/FedEx bills for free.

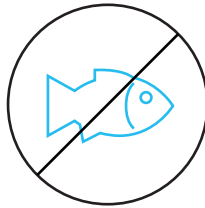
Your Lojistic account is 100% free. No strings attached.

No credit card required. Use Lojistic to manage and reduce UPS/FedEx costs.

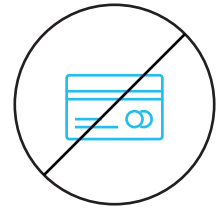
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