



Version 9.9 Update Guide

About This Update

The primary features in this update are:

- ▶ Enhanced Mailnames and CMRA Reporting [2](#)
- ▶ New Interface: SmartScan Digital Mail Delivery (Beta test) [3](#)
- ▶ Stored customer credit card info for Cayan [3](#)
- ▶ Optimized performance [5](#)

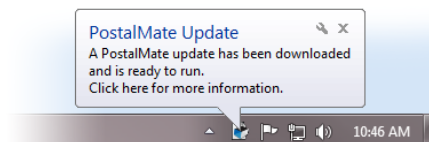
Instructions

Running the Update

If you've already run the update, you can skip this step.

Your system must be on **Version 9.8** or higher to run this update. [PostalMate network users: Every station must be updated one at a time, starting with the Master.](#)

You don't have to do anything to get the update file—it will automatically download to your computer when it's available, and a notification like this will appear:



1. Close PostalMate on all workstations. When prompted, do a PostalMate backup.
2. Click on the notification message. An update screen will display.
3. Click on the "Update now" button.
4. Follow the steps in the install wizard until complete.

What's New in Version 9.9

This section contains a summary of the major changes and enhancements included in PostalMate Version 9.9.



► Enhanced Mailnames and CMRA Reporting

The Mailbox Manager has been enhanced to better meet USPS CMRA (Commercial Mail Receiving Agency) reporting requirements.

More information for mailnames

Additional information is now stored for any additional people who are authorized to receive mail at a given mailbox beyond the primary boxholder (these are called “mailnames”). For each mailname, you can now store a full address, as well as two forms of ID, all of which will appear on the 1583 Form for each mailname. When you remove mailnames from existing mailboxes, that information is now included in the CMRA Quarterly report in the “Customers terminated” section.

Also, you now have the option of adding mailnames to your database as separate Customers without having to re-enter the information—just check the “Add as customer” box on the Add Mailnames screen.

CMRA Quarterly Report cycle options

You can now select the cycle of the CMRA Quarterly Report, depending on what your local PostMaster expects. The difference lies in what dates the quarters begin for reporting—which is not clearly defined in USPS documentation—so you should check with your PostMaster to be sure. The choices are:

- **Jan. 1 - April 1 - July 1 - Oct 1.** This is the normally the correct choice, as most PostMasters want this.
- **Jan. 15 - April 15 - July 15 - Oct 15.** Select this if your local PostMaster has specifically requested this reporting cycle.

To select the preferred cycle:

1. From the Mailbox Manager’s menu, select **Tools > Setup and Preferences**.
2. Click on the “**Other**” tab and choose the desired option under “CMRA Quarterly Report cycle.”

► SmartScan Digital Mail Delivery (Beta test)

PostalMate's Mailbox Manager now has full integration with SmartScan, a digital mail delivery service utilizing mobile devices, that you can offer to your mailbox customers, even if they don't have a physical mailbox assigned. You have full control over what you charge to your customers for what levels of service.

SmartScan is included in your paid subscription to SmartAlert Pro, a third-party mail notification offering. For more information about SmartAlert, go to www.smartalertservice.com.

Here's a quick overview of how SmartScan works:

1. For each incoming piece of mail, you scan the envelope using a free app on your mobile device.
2. Your customer receives the image, using the same app on their mobile device. Via the app, they communicate back to you what to do with that piece (scan its contents, dispose of it, etc.).
3. The system keeps track of what actions you take and what you charge to your customers.
4. The Mailbox Manager adds the charges to your customer's store account (either credit or debit).

For more information about setting up and using SmartScan, download the TechNote.



[Setting up and Using SmartScan](#)



IMPORTANT: Please note that this is a beta version of PostalMate's SmartScan interface, which is still undergoing final testing before its official release, tentatively planned for Summer 2015. If you choose to use this feature now, it's possible that you may experience unanticipated issues. If you aren't comfortable with that risk, you should wait to use this feature until its official release. Should you encounter any problems, please report them to us as soon as possible.

► Stored customer credit card info for Cayan



If you use the Cayan credit card interface, your customers' credit card information can be now be stored and recalled for POS transaction payments and returns (this feature was already implemented for PAYware users in an earlier version). The information is not actually stored in PostalMate; it's stored on secure Cayan servers, which can be accessed through PostalMate when needed for transactions—so your computers are not holding sensitive information that could potentially be hacked. Multiple cards per customer can be stored.

Use of this this feature requires Security to be enabled and set up in PostalMate.

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Setting up for this feature

1. Make sure that Cayan is set as your credit card interface. To check this, from the POS Register go to **Tools > Options > Register Settings**, and click on the **Credit Card** tab.
2. Make sure you have System-wide Security enabled. To check this, open PostalMate System Utilities, click the Security Settings button, and ensure that "Enabled" is checked. Leave this window open for the next step.
3. There's a new Access Rights selection called "Saved credit card." This must be checked for any user who will be using this feature.
4. Click **OK** and close PM Utilities. The feature is now ready for use.

Using this feature

Adding and saving card information can only be done from the POS Register (not PostalMate), and with a user logged in who has the access rights explained in Step 3 above.

Adding and saving card information from the Edit Customer screen

1. From the POS Register, go to **Edit > Customer**.
2. Select the desired customer and click the **Edit** button.
3. Click on the **Credit Cards** tab.

Customer Information: Customer, Sample

General Info Detail Info Notes History Accounts **Credit Cards** Mailboxes

Cards listed here can be used for transactions without the card being present.

Card

Visa ending in 5093

+ Add card

- Delete card

Visa ending in 5093

Account statements Mailbox renewals

Transaction history:

Process date	Approved	Type	Error
	<input type="checkbox"/>		

The information is stored securely on Cayan servers, not on this computer. Note that if in the future you change your Merchant ID or processor, all stored credit card information for your customers will be deleted.

Register Deposit: \$0.00

OK Cancel Help

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4. Click the **Add** button. You'll see a message box informing you that a \$1.00 transaction will be generated then voided. Click **OK** to confirm.
5. Swipe the card or manually enter the information, then click **Process**. The card will appear in the list, showing the last four digits only.
6. Optionally, check the "Account statements" and/or "Mailbox notices" boxes if the customer wants you to use the stored card info to process payments for those things on their behalf. This will add the cards to the "Stored Credit Cards" reports in CashMate and in the Mailbox Manager, respectively.
7. Click **OK**.

Using saved card info for a payment or return

1. You must be logged in as a user with "Saved credit cards" access rights.
2. Link a customer to the POS transaction.
3. On the Register Total screen, click Credit Card tendering button.
4. Select "Use saved credit card."
5. Select the desired card from the list.
6. Click **Process**.



► **Optimized Performance**

Many of PostalMate's functions have been re-engineered behind the scenes to provide you with the best possible experience in speed and reliability.

Backups have also been reworked to be faster, and to generate much smaller backup files, due to better compression. Note that the backup files now have a filename extension of ".7z" (as opposed to ".zip").