Getting Started

PC SYNERGY

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What is PostalMate?

PostalMate is a multi-carrier shipping system designed especially for retail mail & parcel centers. It includes UPS, FedEx, DHL and USPS for domestic and international. Lone Star Overnight, OnTrac, and Spee-Dee are supported as regional carriers. Internet shipping is available and fully integrated with each of these carriers.

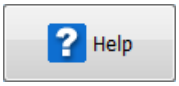
PostalMate also includes a point-of-sale cash register (CashMate), accounts receivable and mailbox management program that works with your shipping system for fast, seamless transactions. The CashMate POS system is included with PostalMate, however, it's optional.

About this Guide

The Getting Started Guide is a quick reference document to assist you in getting up and running quickly with your PostalMate® shipping system, including the CashMate register. The idea here is to keep it short and simple. If you need more information, see below.

Additional Assistance

This PostalMate Getting Started guide links to additional TechNotes which are downloadable PDF documents that provide detailed information and instructions about specific features. When viewing this guide from a browser, the links are available to access the TechNotes. Or, go to www.pcsynergy.com Choose **Help & Support > TechNotes.**



This is your manual. Every screen in PostalMate has a Help button. Just click on it and detailed information about that screen will be displayed.

Each year, PC Synergy provides regional training courses. Visit www.pcsynergy.com for locations and registration information.

Contacting Customer Support

Website Forum: www.pcsynergy.com. (Choose the Forum button.)

Email: support@pcsynergy.com

Phone: 760-410-1677 option 1

Fax: 760-410-1696

Facebook: www.facebook.com/postalmate

Twitter: www.twitter.com/postalmate

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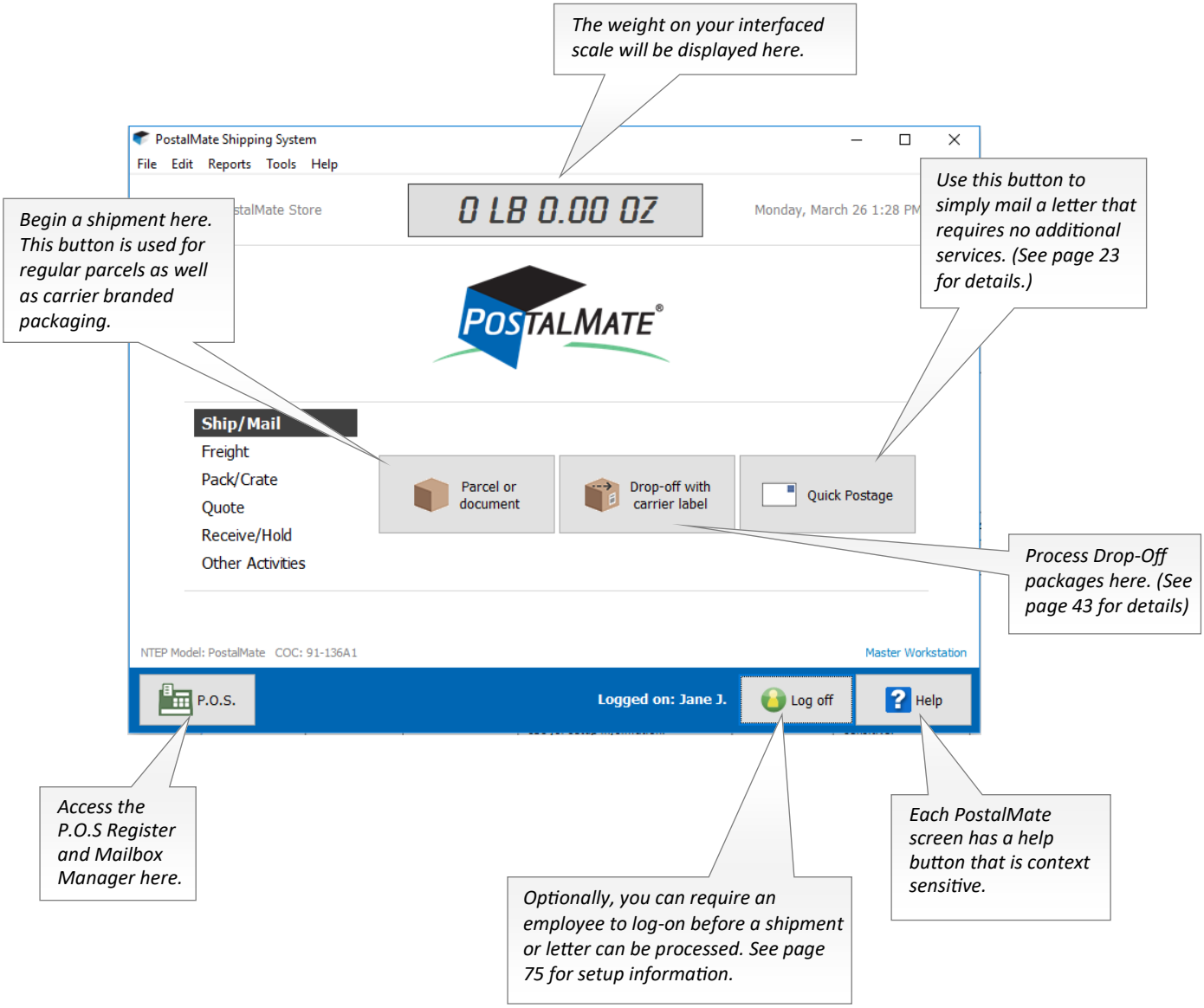
Open PostalMate by clicking on the desktop shortcut. (Optionally, click ***Start > All Programs > PostalMate*** and choose PostalMate from the sub-menu.) If this is your first time running PostalMate, you will be asked to enter your serial number. Once installed, you'll be prompted to run the Setup Wizard.

Touring PostalMate

A new install of PostalMate will display the following automatic prompts which is how information is entered for shipping transactions. See page 34 for information on changing how to change prompts to best fit your store operations.



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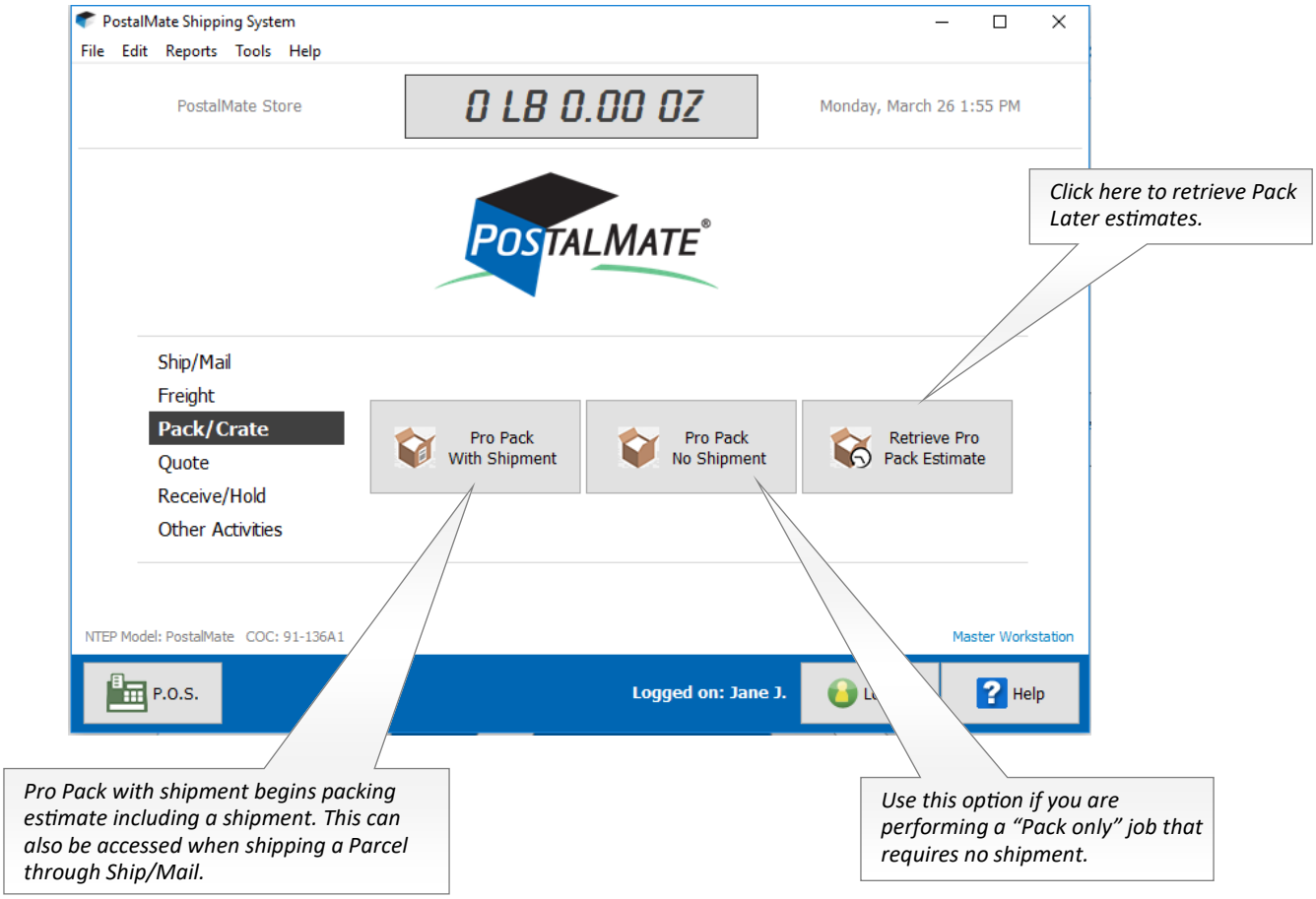
Pack/Crate

Pack/Crate is a central place for Pro Pack with a shipment, Pro Pack with no shipment and to retrieve your pack later estimates. See page 11 for more information on Pro Pack.



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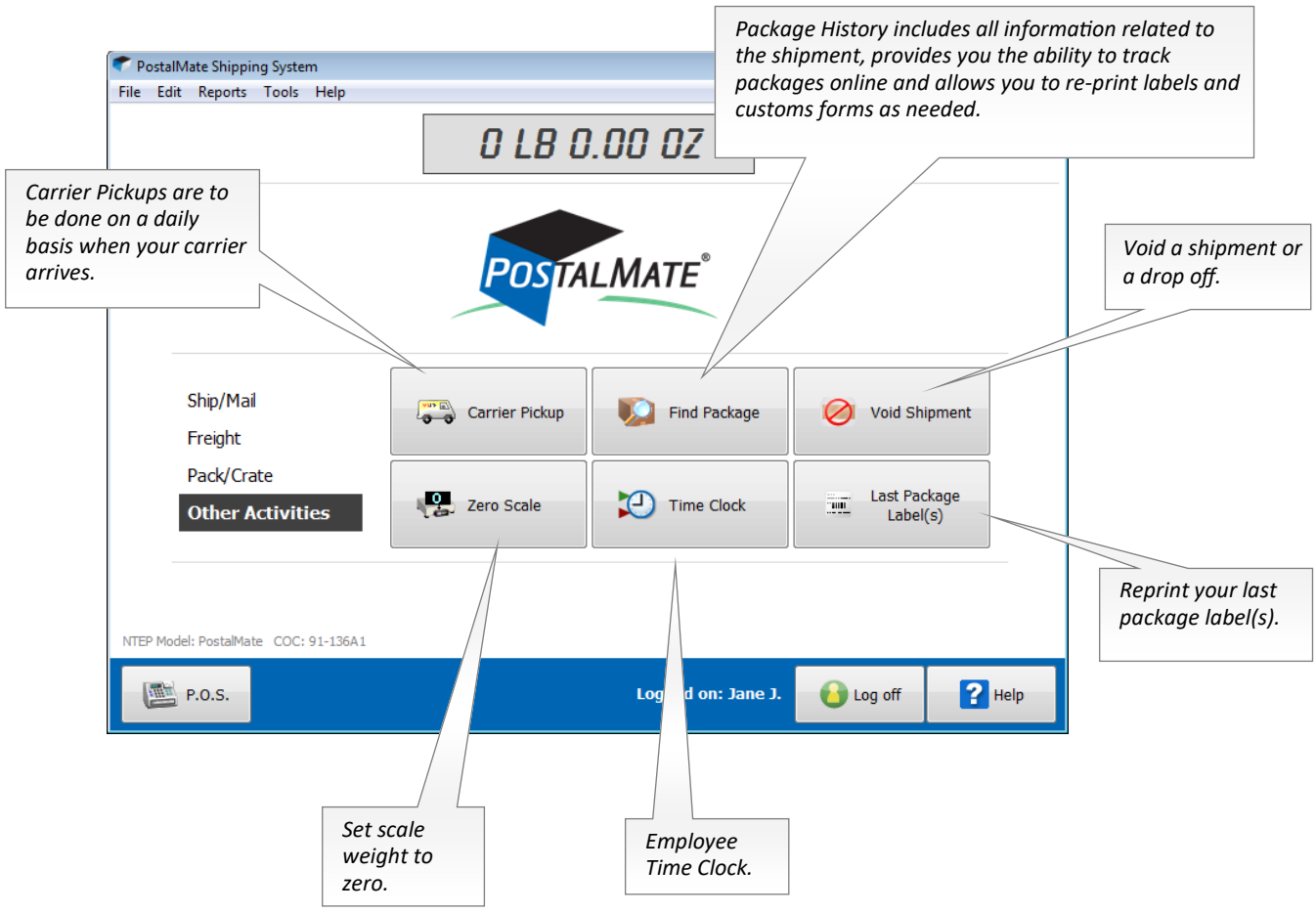
Other Activities

Other Activites includes functions that are common in day-to-day shipping.



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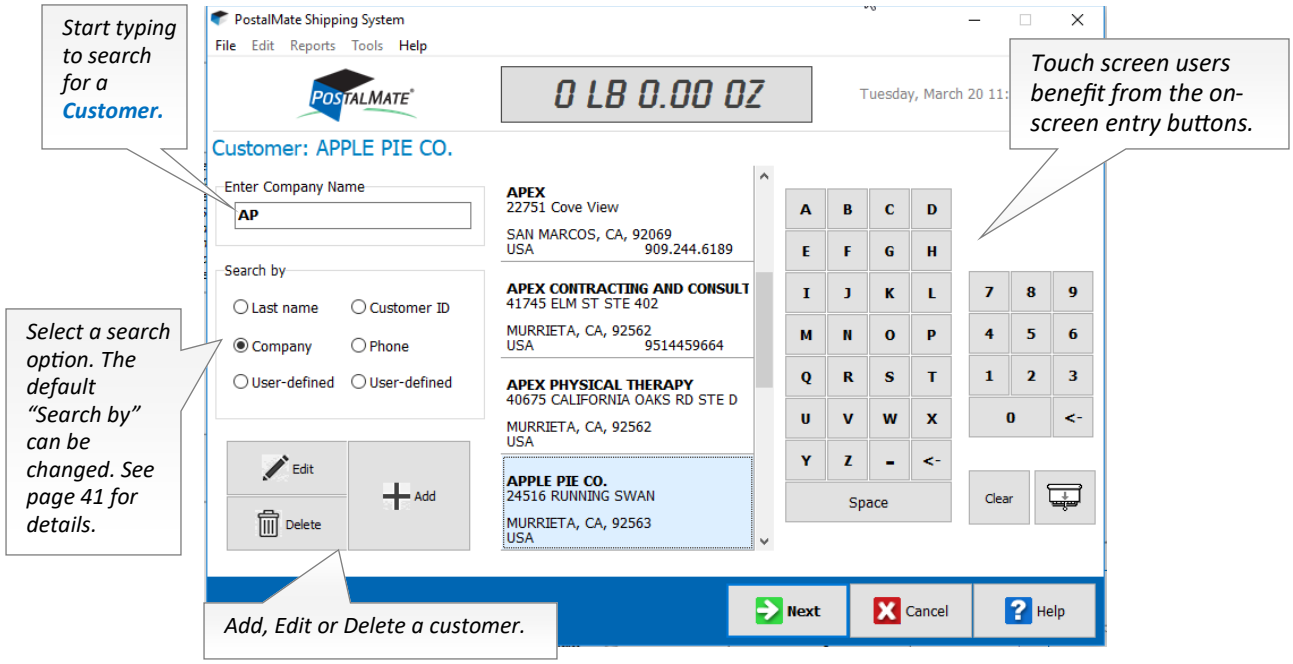
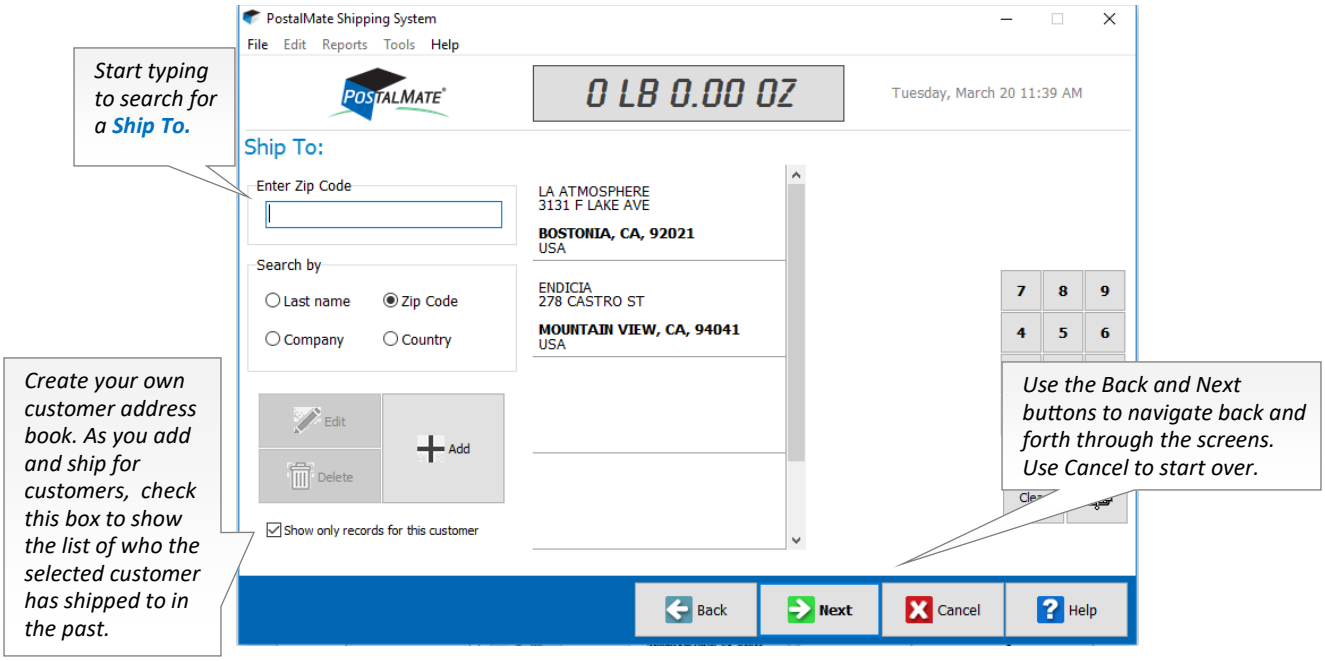
▶ Customer and Ship To screens





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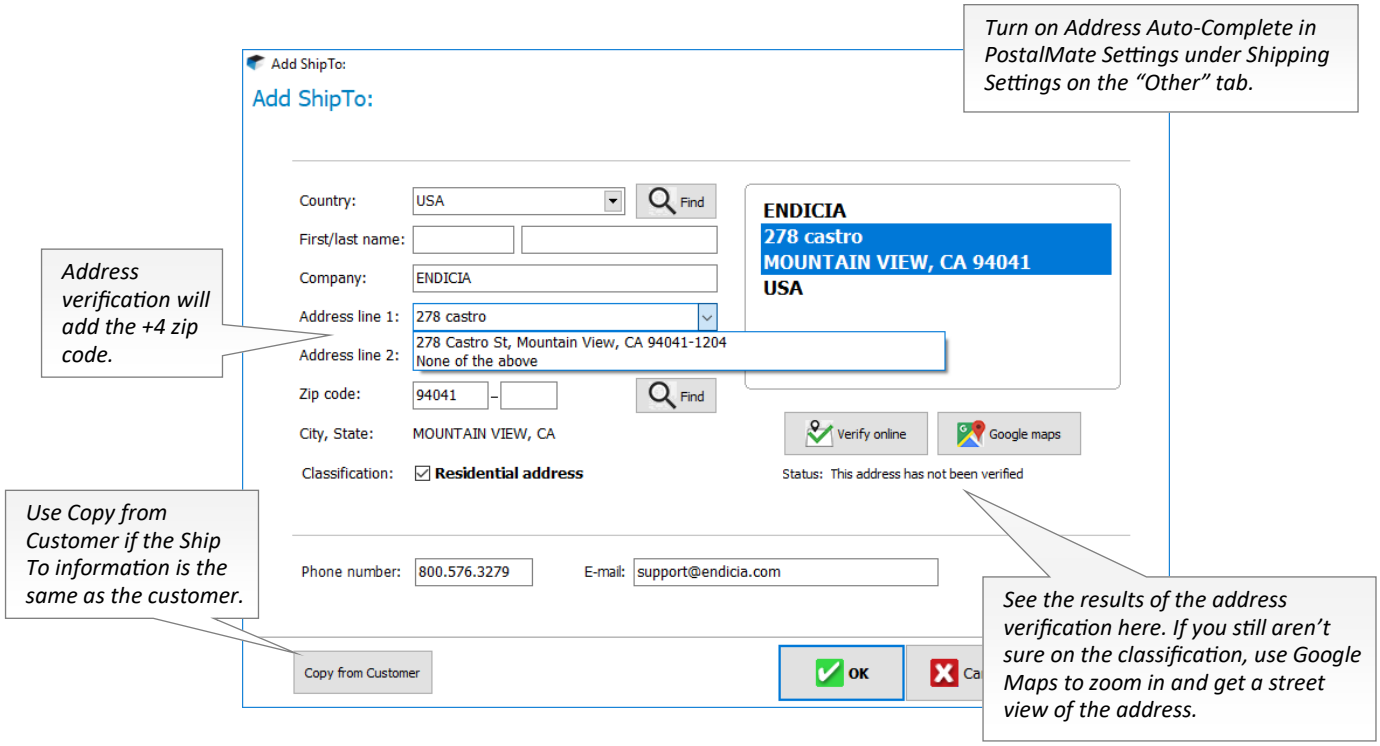
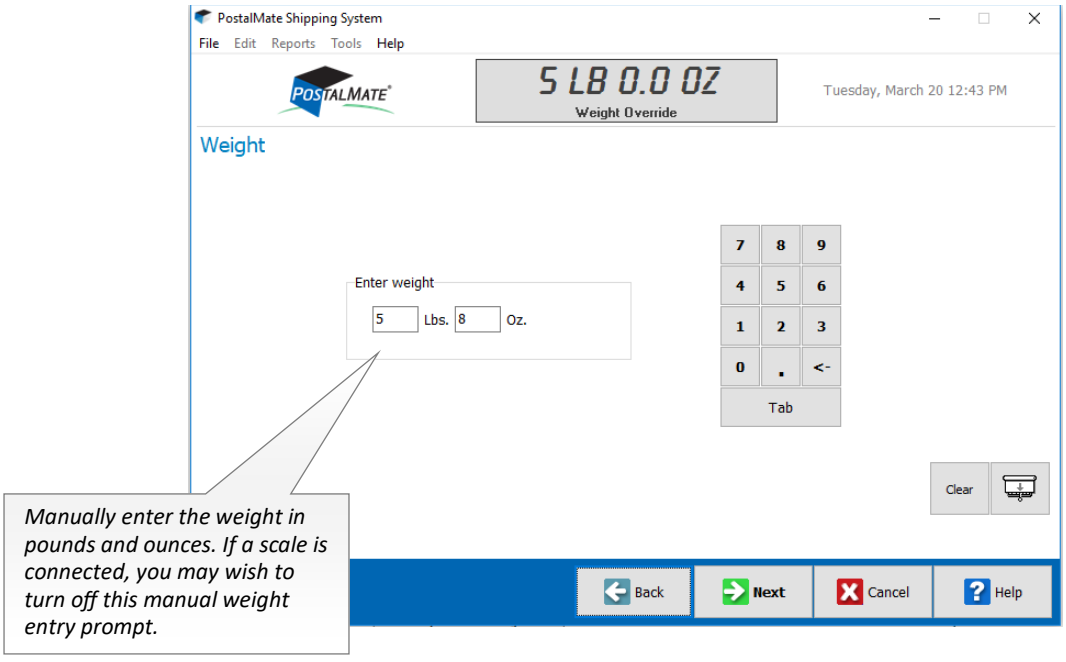
Add Ship To

Address Auo-Complete uses advanced technology to find and select addresses as you are typing them in on the Ship To screen. This works for US and Canada addresses.



Weight screen



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▶ Pro Pack (packing automation)

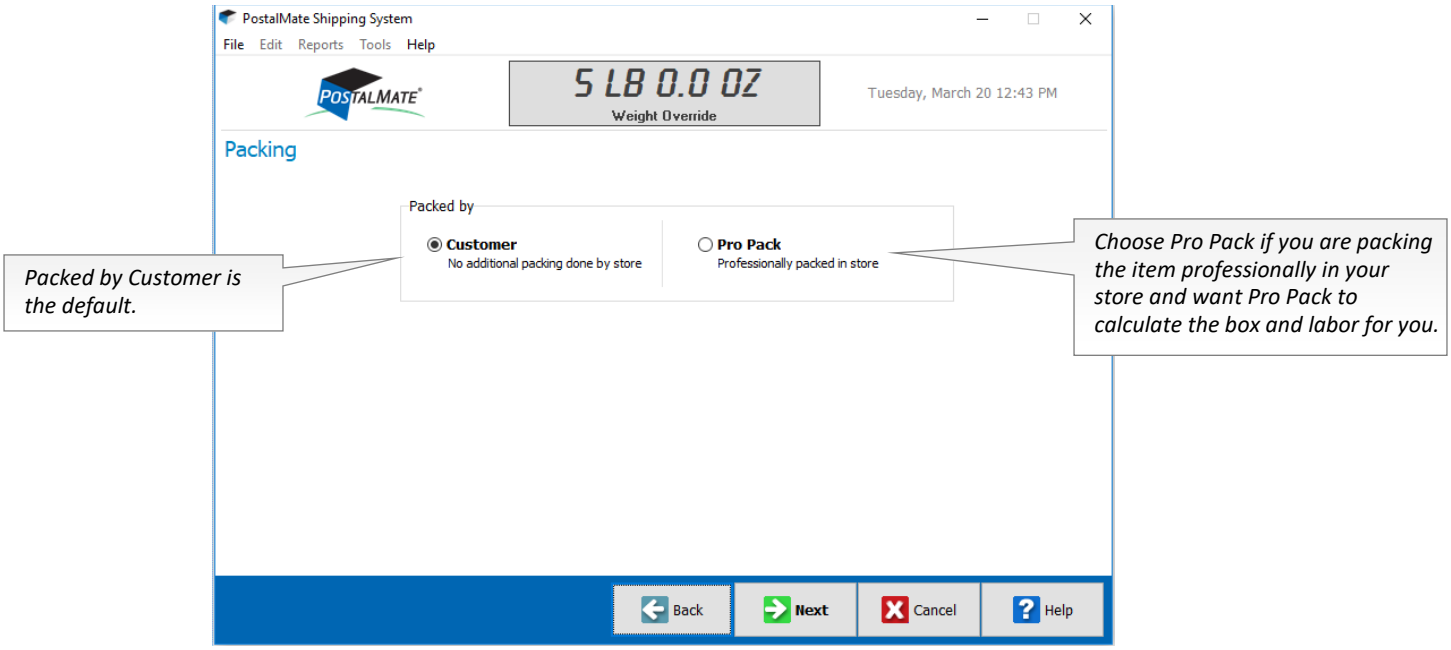
Whether you are packing the shipment now or later, choose the Pro Pack button to quickly and accurately calculate charges for almost any kind of packing job while enhancing your customer service and your profitability. See page 44 for details on setting up Pro Pack.

Pro pack calculates for you…

...the ideal box size for what you're packing, then selects the closest one from your inventory. If you're out of stock, it will help you find the next closest one.

...the correct amount of padding and filler according to the fragility of the contents, and the space between the item to be packed and the selected container.

...the estimated finished weight and dimensions for shipping—before you've done the actual packing.



See TechNote titled Getting Started with Pro Pack for complete details.

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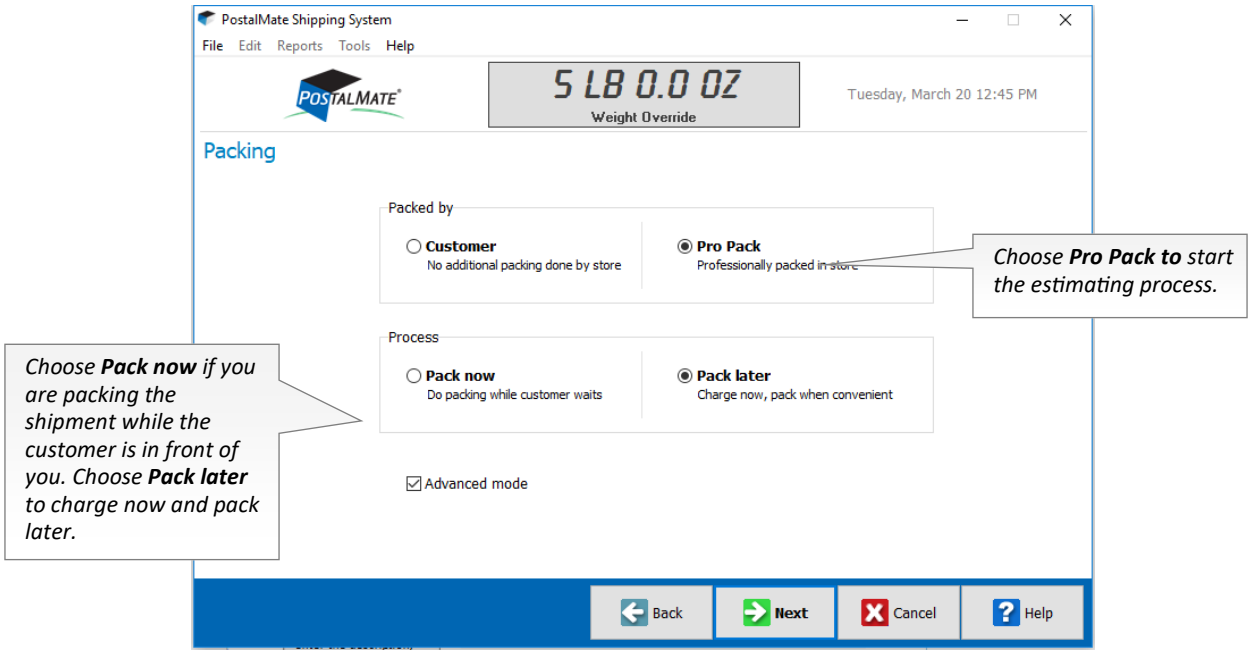
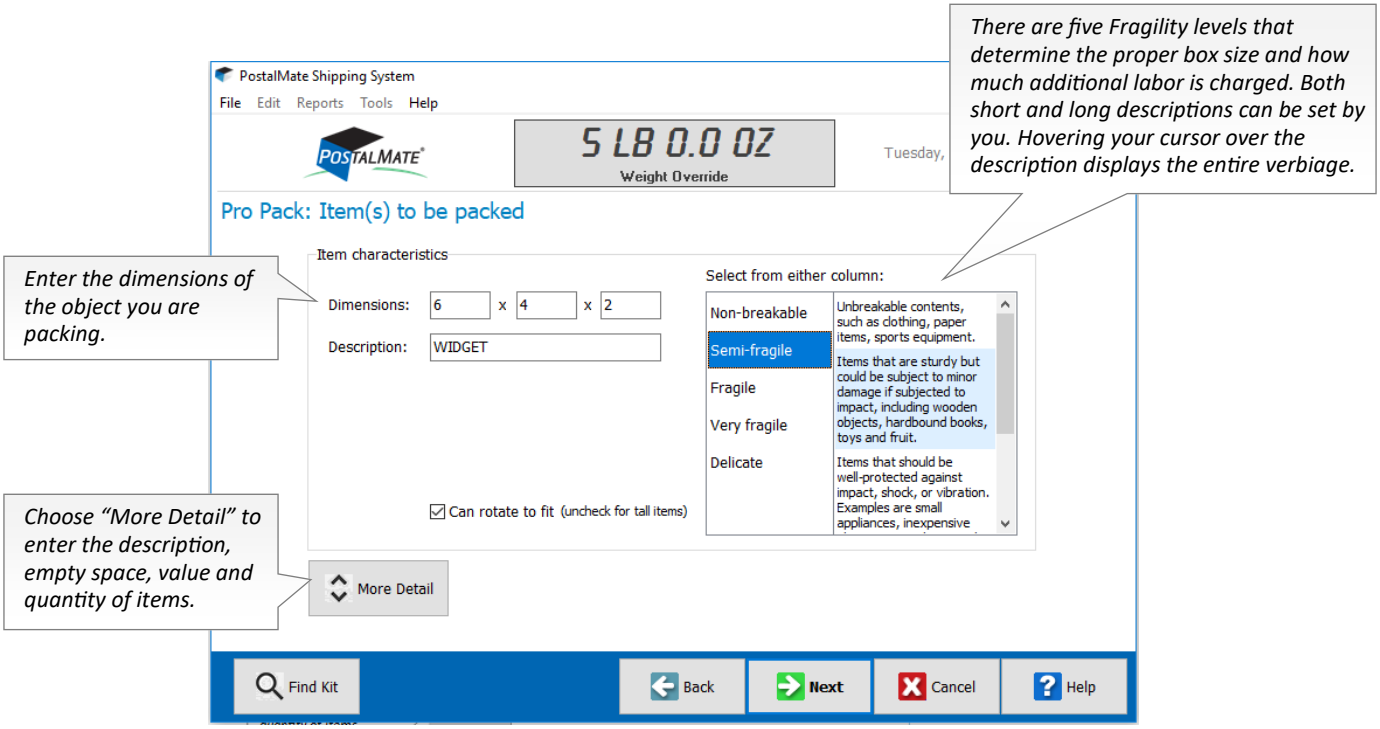
▶ Pro Pack continued...





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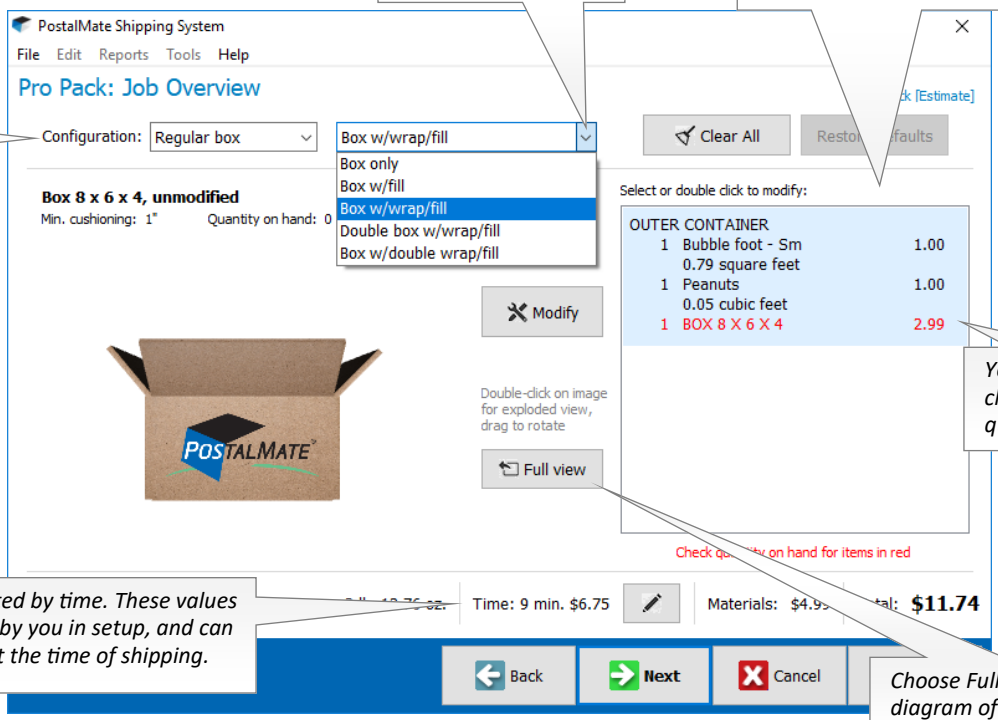
▶ Pro Pack continued...

Choose Regular Box or Crate...

Select the type of packaging job.

Based on the object dimensions and the fragility level selected, Pro Pack will pick the appropriate box size (you'll need to add your boxes and fillers into PostalMate as products). See page 46.



Your inventory is checked for sufficient quantities on hand.

Labor is calculated by time. These values are determined by you in setup, and can be overridden at the time of shipping.

Choose Full View to see a diagram of the box.

Full view includes additional info, including a cut list (when applicable).

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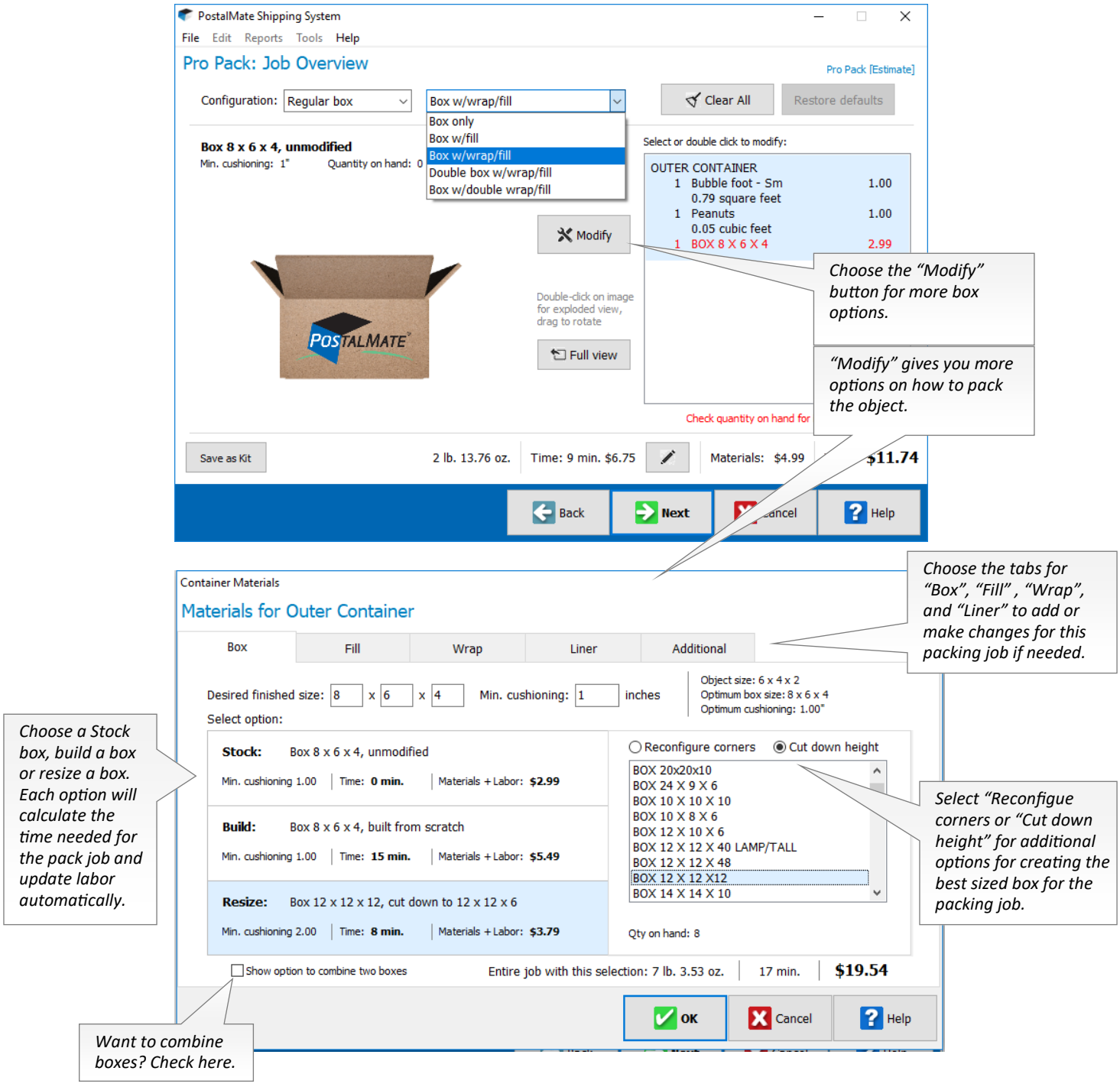
▶ Pro Pack continued...



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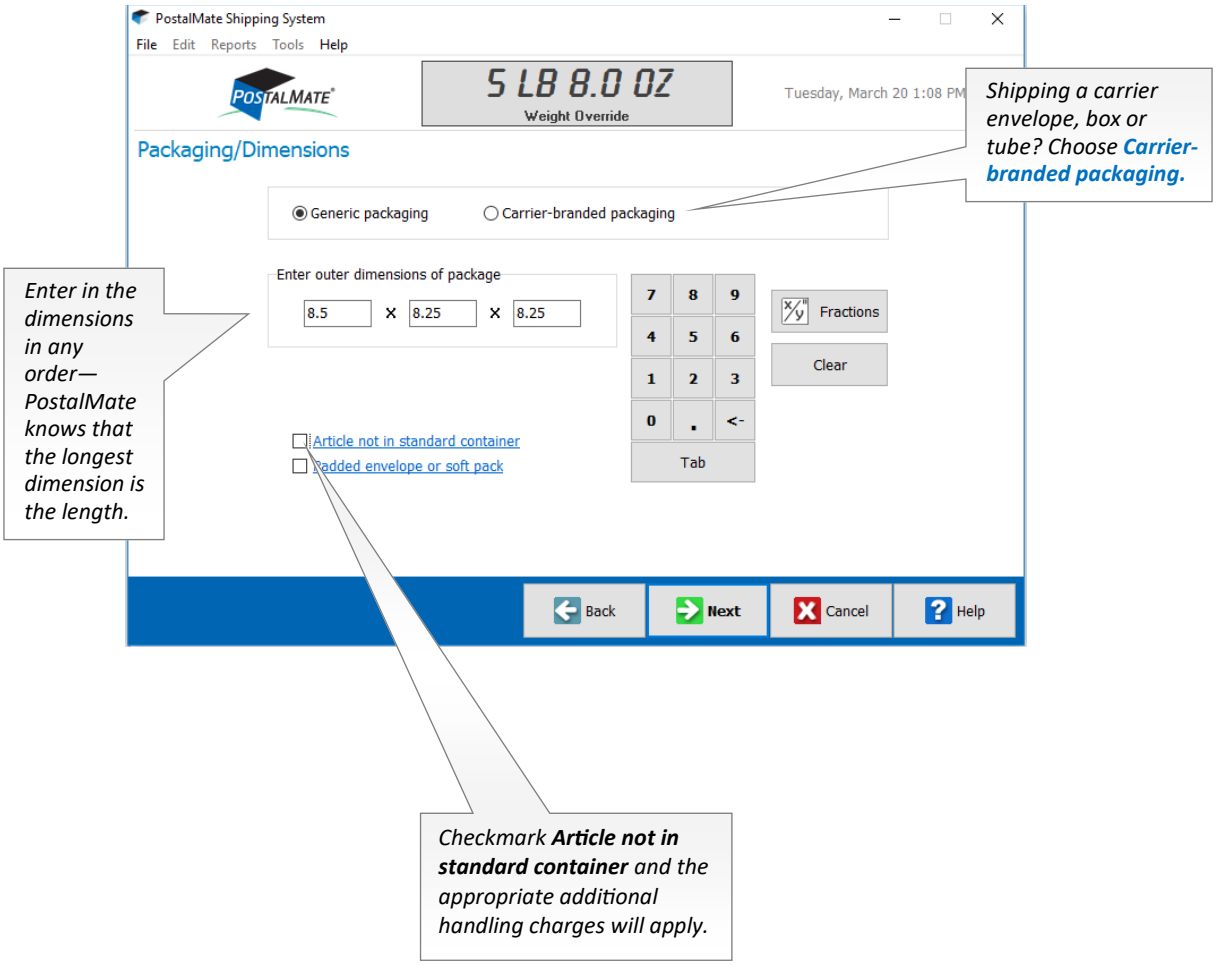
▶ Packaging/Dimensions screen

Switch freely between Generic and Carrier-branded packaging. Use the Dimensions button on the Rate Comparison screen to return to this screen to make any changes.



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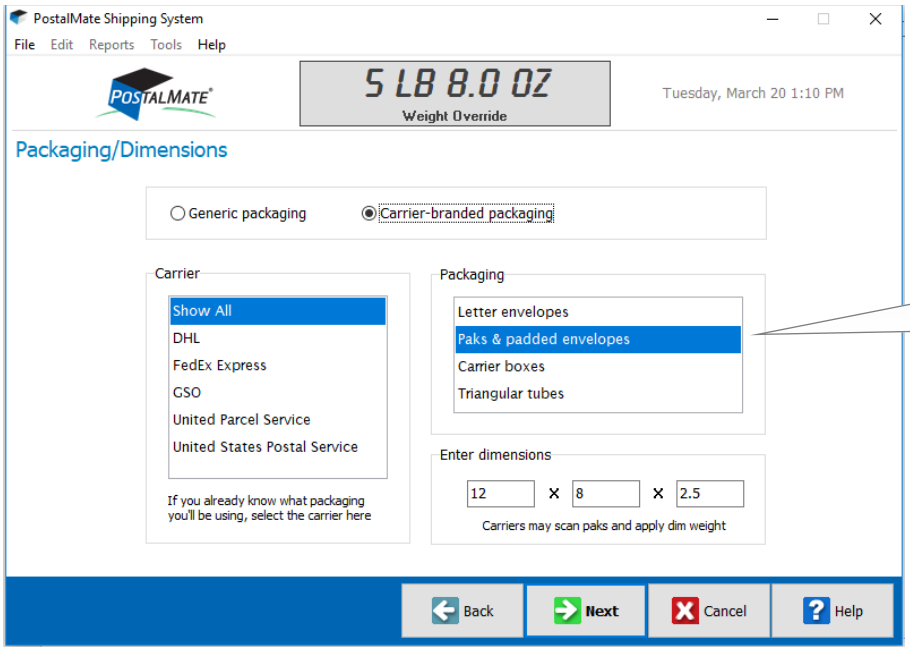
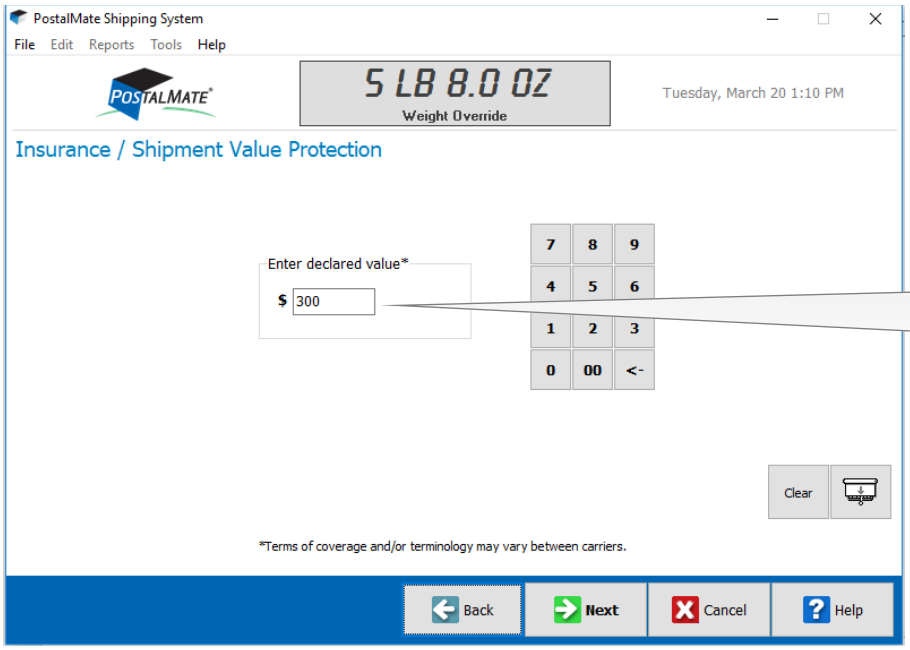
▶ Packaging/Dimensions screen continued...



When carrier-branded packaging is selected, you'll be prompted to select a type (if you choose Paks, you can also enter dimensions).

▶ Insurance / Shipment Value Protection



If there is a value to declare, enter the amount here. PostalMate will calculate the declared value based on carrier coverage or an alternate insurance carrier if set up.

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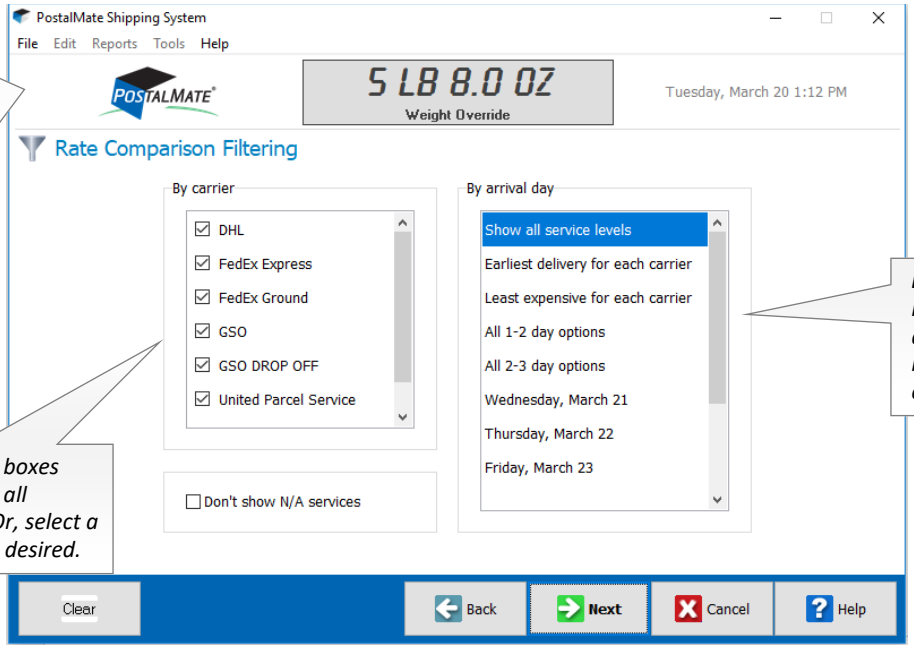
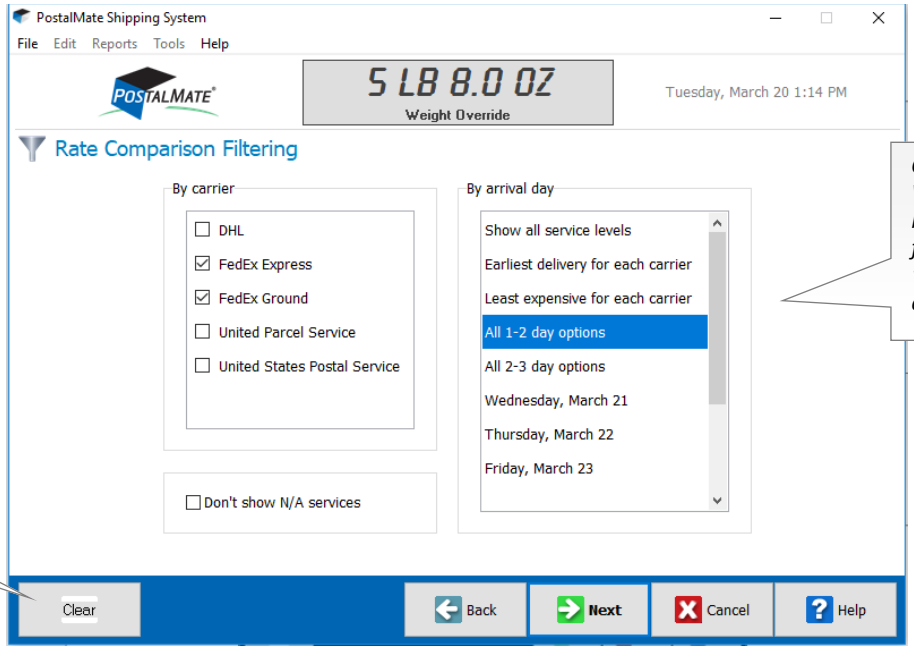
▶ Rate Comparison Filtering

Generic Package Filtering: *Use these options to narrow down shipping options that will display on the Rate Comparison screen.*



By carrier: *Leave all boxes checked if you want all carriers to display. Or, select a subset of carriers as desired.*

By arrival day: *Show all service levels is the default. Choose another option if you wish to narrow down the options shown on Rate Comparison.*



Carrier-branded packaging: *When shipping via carrier-branded, you have an additional filter for "Flat rate only", "Weight based only", or "Least expensive".*

*Use **Clear** at any time to return to your default selections.*

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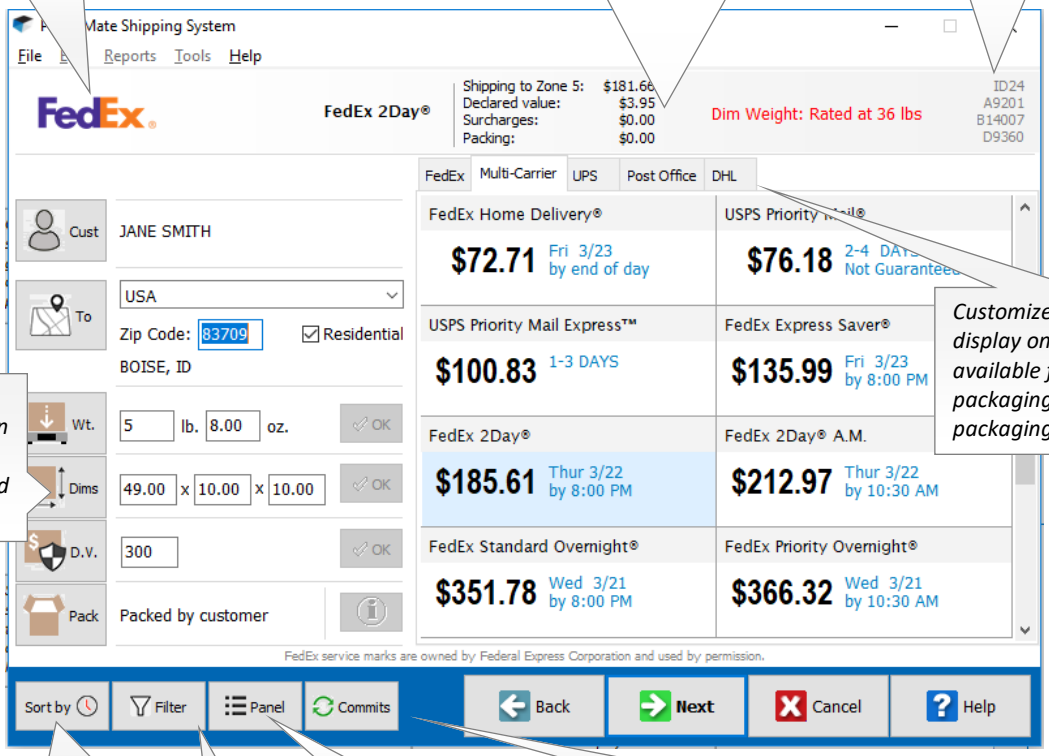
The Rate Comparison Screen

When entering information using the prompts described, Rate Comparison will display rates based on destination, weight, dimensions, packing, and declared value. Use the Pro Ship navigation options on the left to make any needed changes.

The carrier logo will display here after selecting a service.

Once a service is selected, you'll see a break down of the retail pricing. If there are any surcharges, you can hover the cursor over "Surcharge" and see them itemized. Note: This doesn't apply to fuel surcharges, which are rolled into the base rate in PostalMate. If dimensional weight is applied, it will be indicated here.

A = Wholesale rate
B= Suggested Retail/Counter rate.
C = Published rate
D = Profit amount
See Page 41.



Customize which services display on each tab. Six tabs are available for both Generic packaging and Carrier-Branded packaging.

Click here to switch between generic and carrier-branded packaging.

Select the "Clock" icon to sort services in rate comparison by time. Choose the "Dollar" icon and services will show from the lowest cost to the highest.

Click here to show rates in full screen mode.

PostalMate will update carrier commitments automatically when entering a Ship To. Choose this button if it is available to update commitments.

Choosing the funnel icon brings you to the Filtering screen, allowing you to filter the service choices that will display here.

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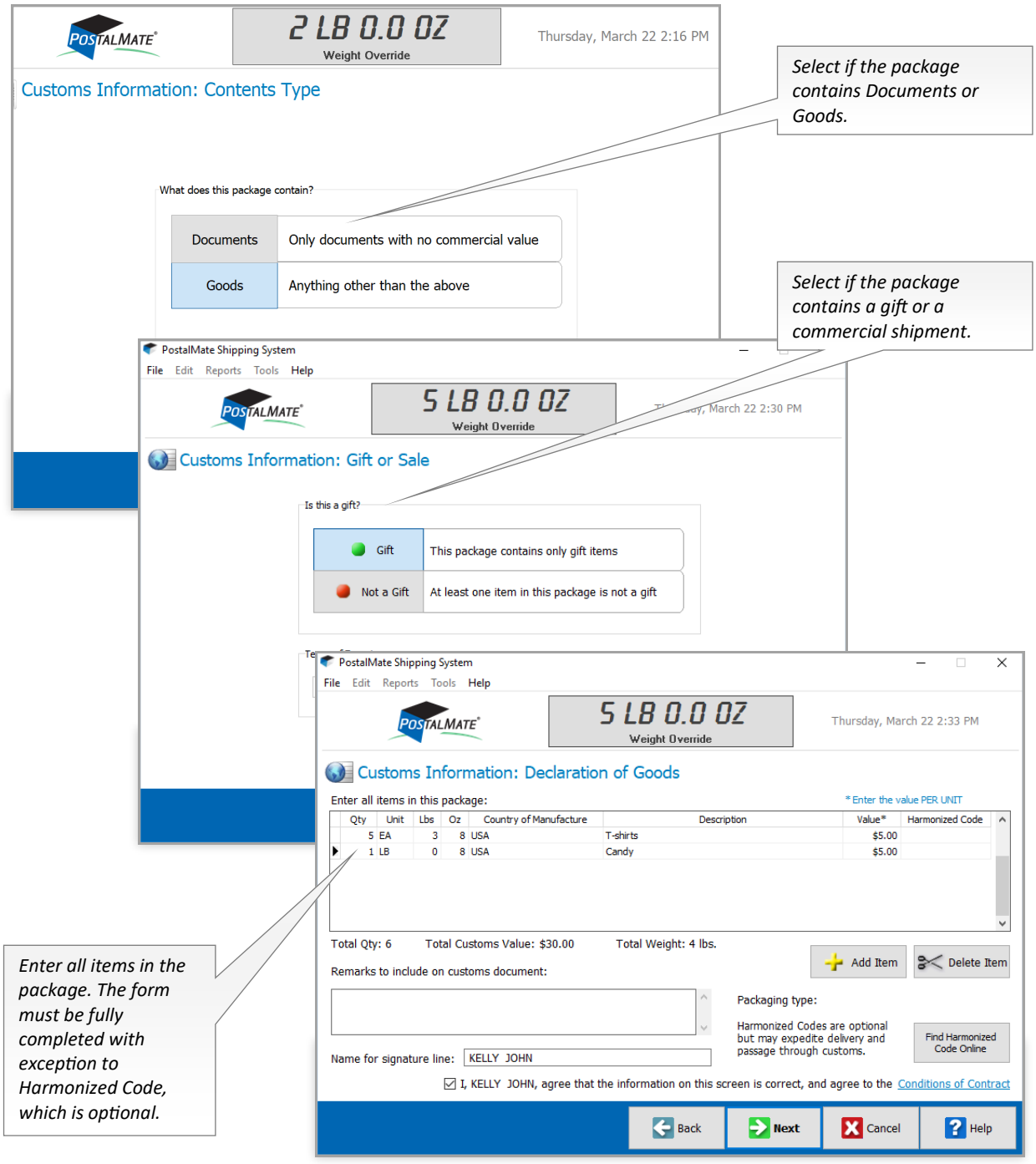
International Customs Information

For International shipments, you will be prompted to enter the appropriate customs information. Integrated customs forms are available for FedEx International, FedEx International Ground Canada, UPS International, DHL International as well as USPS International and APO/FPO (if using the Endicia interface). You will notice small differences for each carrier, as each carrier has slightly different rules and requirements.



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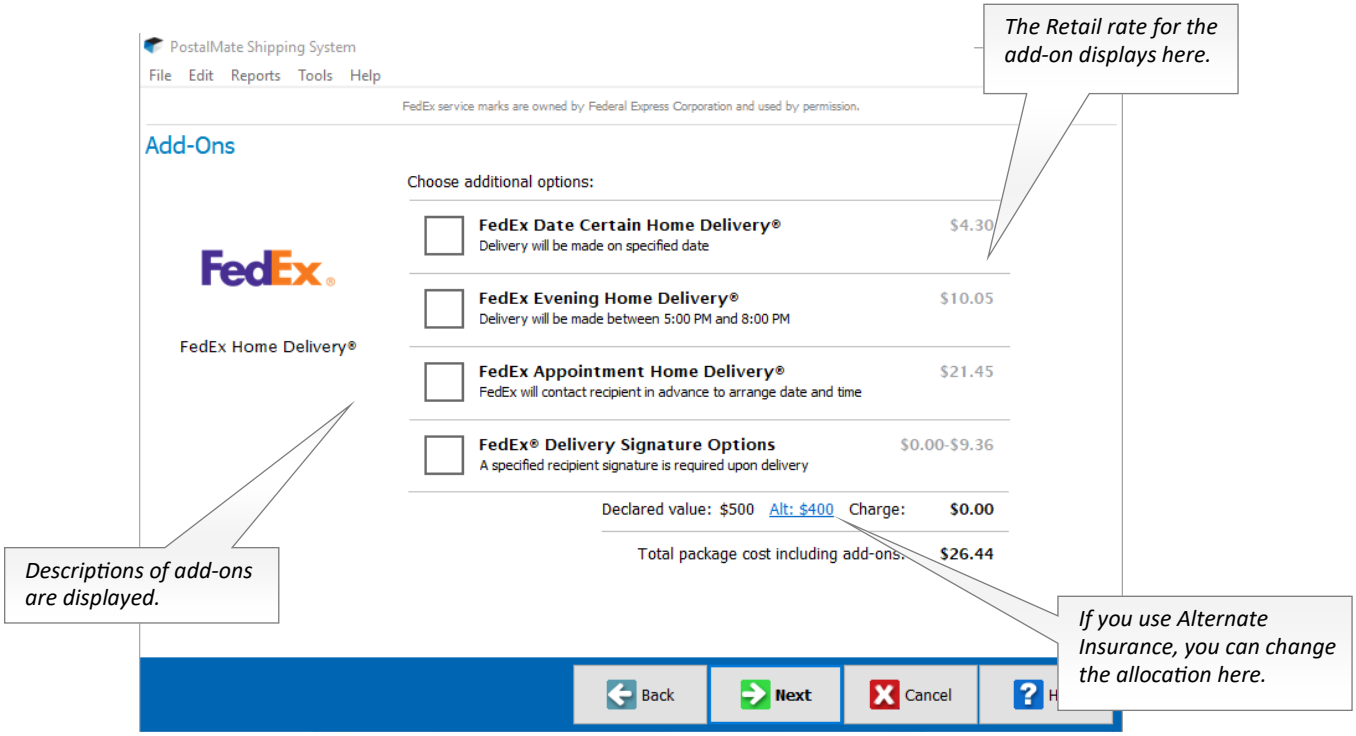
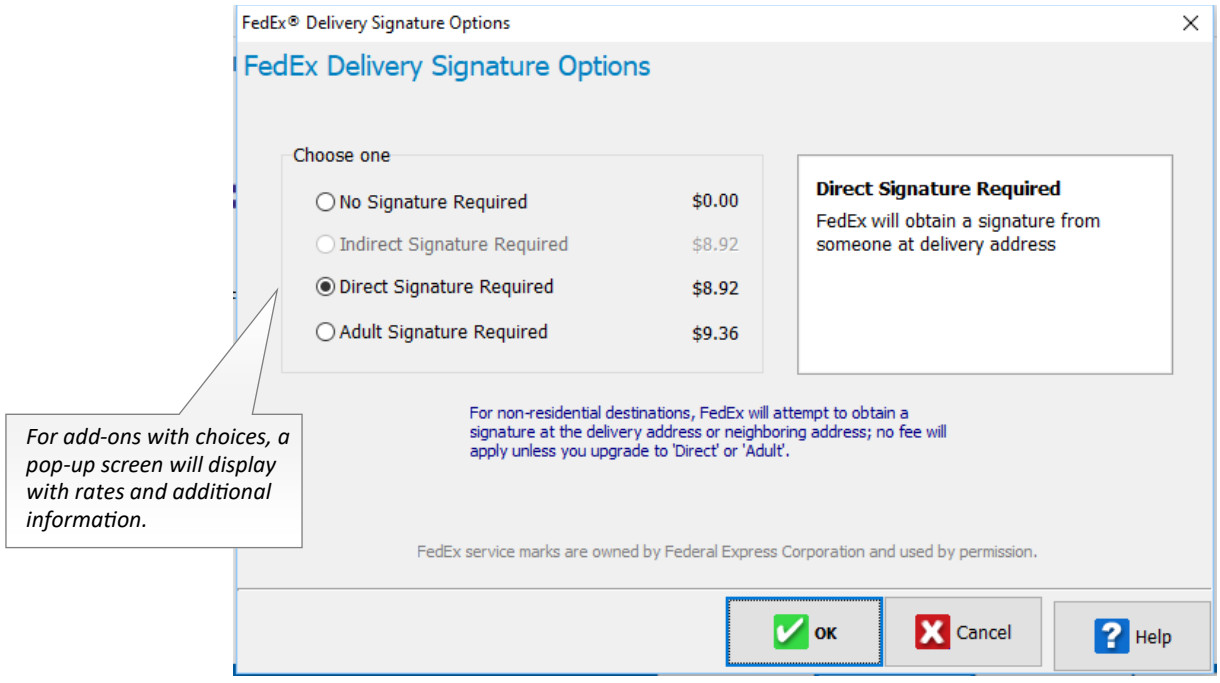
▶ Add-Ons Screen

Add-on selections for a given shipment are shown on a dedicated screen. This screen appears after the Rate Comparison screen. If no add-ons are available for the selected service, the screen will be skipped.





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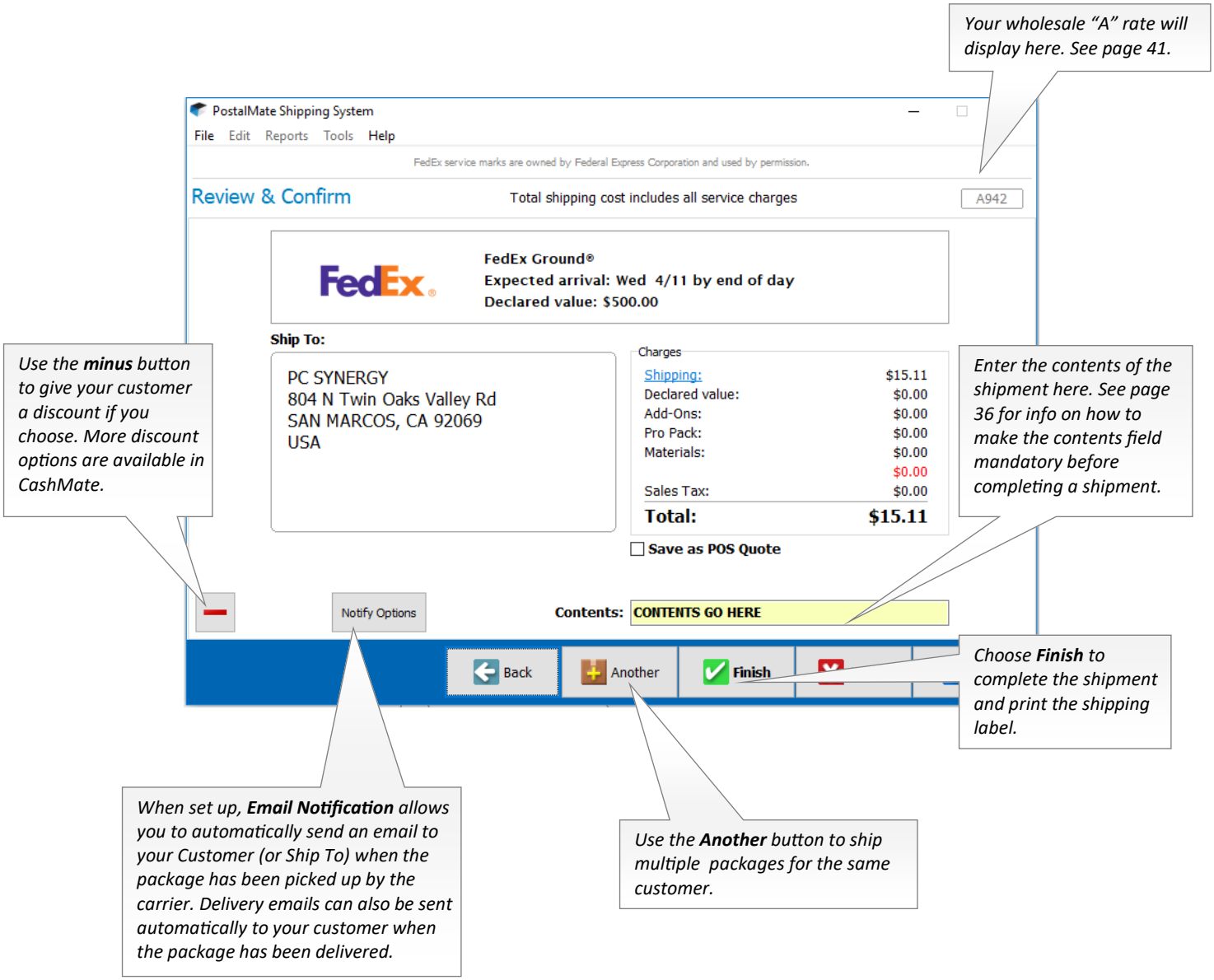
▶ Review & Confirm screen

Verify the shipping information here. You can also add the Contents, apply a discount, and include email notification options.



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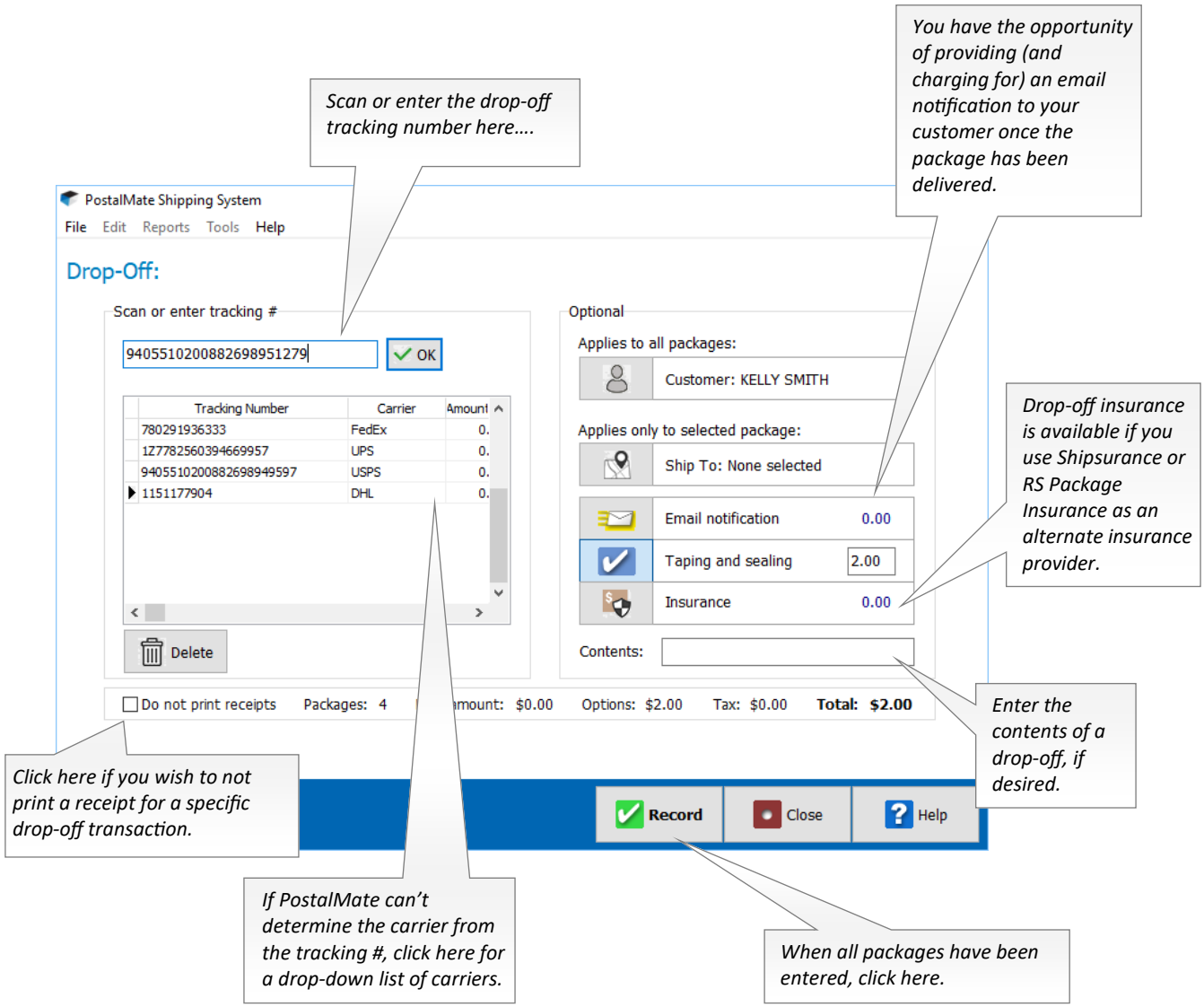
Recording Drop-Offs

Recording drop offs are as simple as Scan > Record. You also have an opportunity to gather Customer and Ship To information (for history and tracking purposes), to print a drop-off receipt, to charge for taping and sealing and/or send a delivery confirmation email.

The process is the same for one drop-off or many. Scan or enter the tracking number for the first package. It will appear as the first item on the list. Select whatever options you would like for that package. As additional packages are entered, they'll appear on the list. When all packages are entered, click the "Record" button.



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▶ Quick Postage

The Quick Postage screen is designed for simple USPS shipments that do not require a Customer, Ship To, or full address label. You can interface with Endicia's ELS label server and print stamps directly to a Dymo label printer.

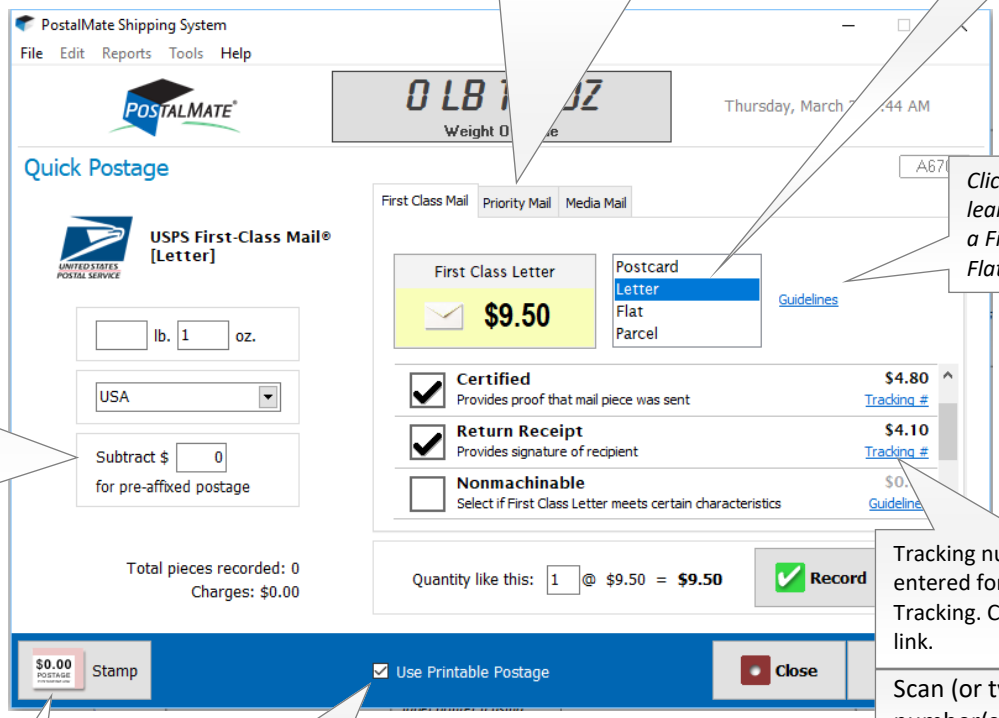
*Select a tab for **First Class Mail**, **Priority Mail** or **Media Mail**.*

*Note: The Priority Mail or Media Mail tabs can be turned off or "hidden" on this screen if desired. Go to **Tools > PostalMate Settings > Shipping Settings > Quick Postage** to change. Options are: Always show, Never Show, or On Demand.*

***First Class Mail**: Choose Postcard, Letter, Flat or Parcel.*

Click "Guidelines" to learn what qualifies as a First Class Letter, Flat or Parcel.

If postage is already applied to the mail piece, use this option to subtract the amount from the total.

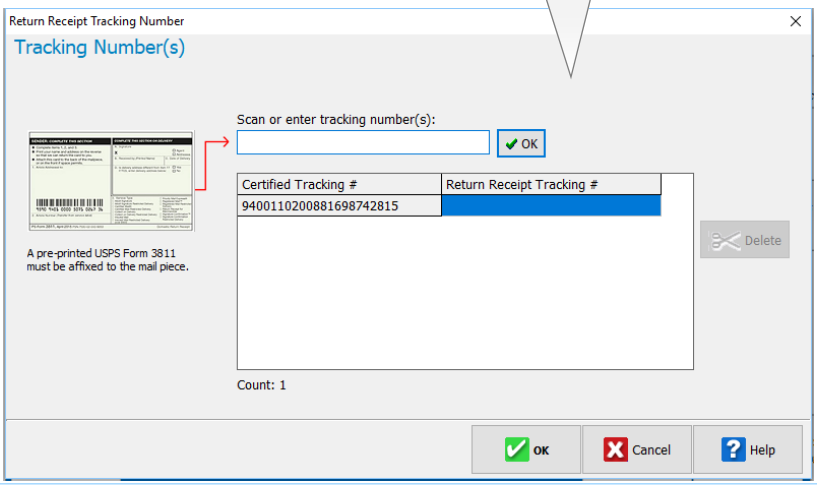


Tracking numbers can be entered for Certified and USPS Tracking. Click the "Tracking" link.

Scan (or type) in the tracking number(s) here and click **OK**.

Zero postage meter strips can be printed here if using Printable Postage.

A postage label stamp will print to your Dymo label printer if using Printable Postage.



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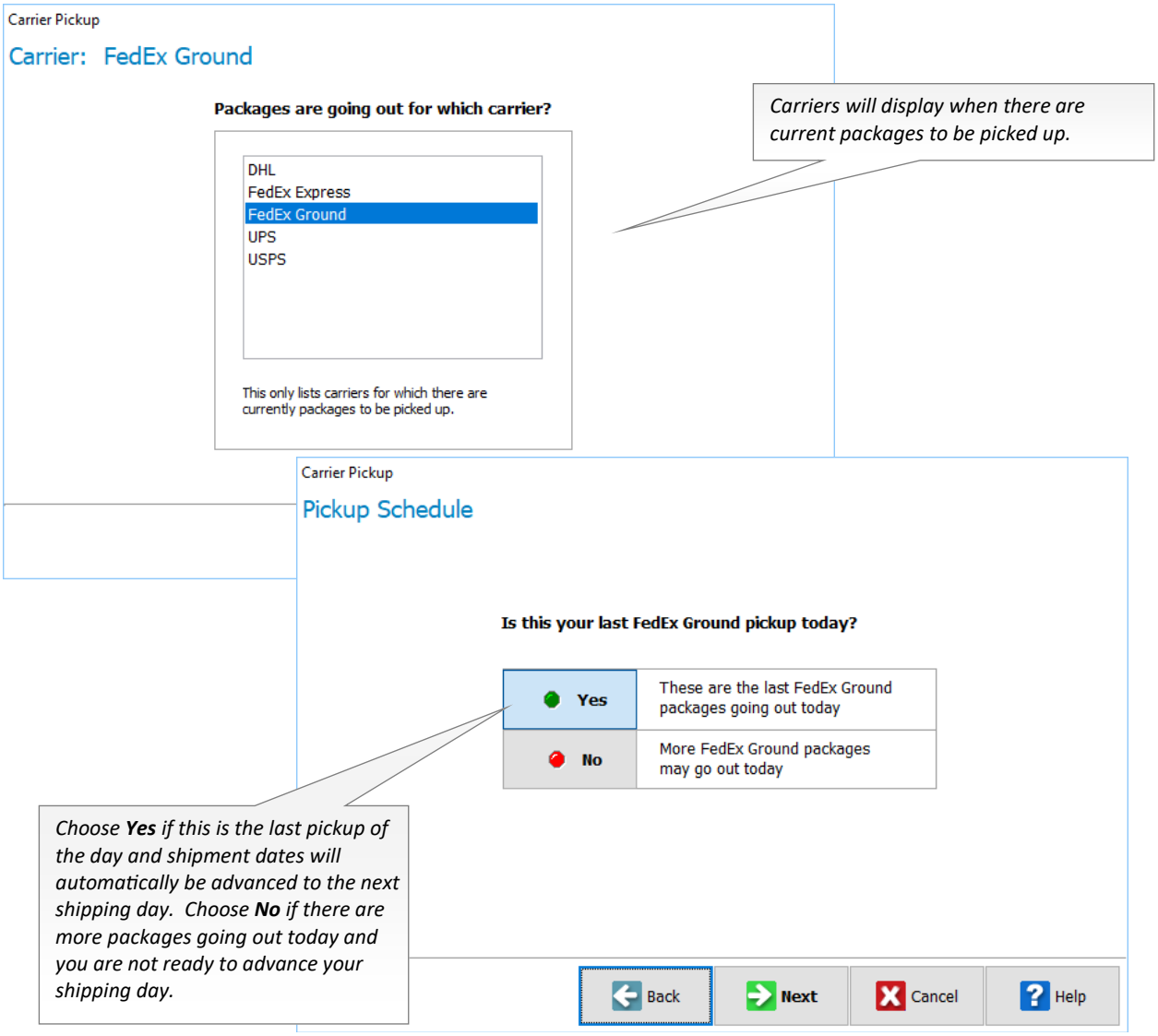
Carrier Pickup

A Carrier Pickup should be performed at the end of each day, or when the driver comes to pick up packages for each corresponding carrier. Performing a Carrier Pickup does the following:

- Marks shipments as "Picked up" in shipment history
- Allows you to advance the shipment date to the next business day for UPS, FedEx and DHL.
- Allows you to advance the mailing date for USPS when using the Endicia interface.
- Begins the Email Notification process.
- FedEx Ground manifest will print.
- If Endicia Label Server is enabled, the SCAN form will print.
- If using the Shipsurance interface, insurance information will upload to Shipsurance.
- DHL drop-offs are uploaded electronically (for compensation counts).



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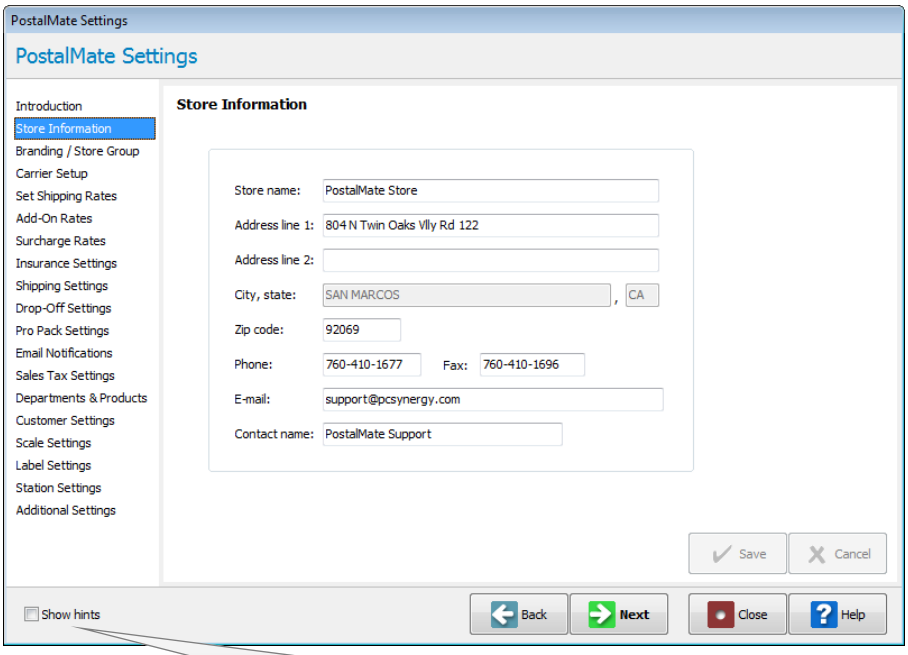
PostalMate Settings

The PostalMate Settings Wizard allows you to quickly set up your PostalMate software in one convenient location. After each step you may either click “Next” or use the menu on the left side of the screen to navigate to a specific area. If at any time you need additional assistance, click “Help”. Screen hints are also available as you mouse over them.

Choose **Tools > PostalMate Settings** to access PostalMate settings at any time.

▶ Enter Store Information

- Enter your store information.
- Your store address will be on the return address of all domestic, private carrier shipments. You are considered the shipper of record by all private carriers. With the exception of International shipments, your customer is not the shipper.
- PostalMate uses your Zip Code to determine shipping zones.
- If you make any changes to your email address, make sure to contact PostalMate Support and to update your email address. PC Synergy uses email to contact you about updates, known issues and upcoming events.



Screen hints are available as you mouse over menus, topics and more in PostalMate. Check this box if you’d like to enable the on-screen hints.

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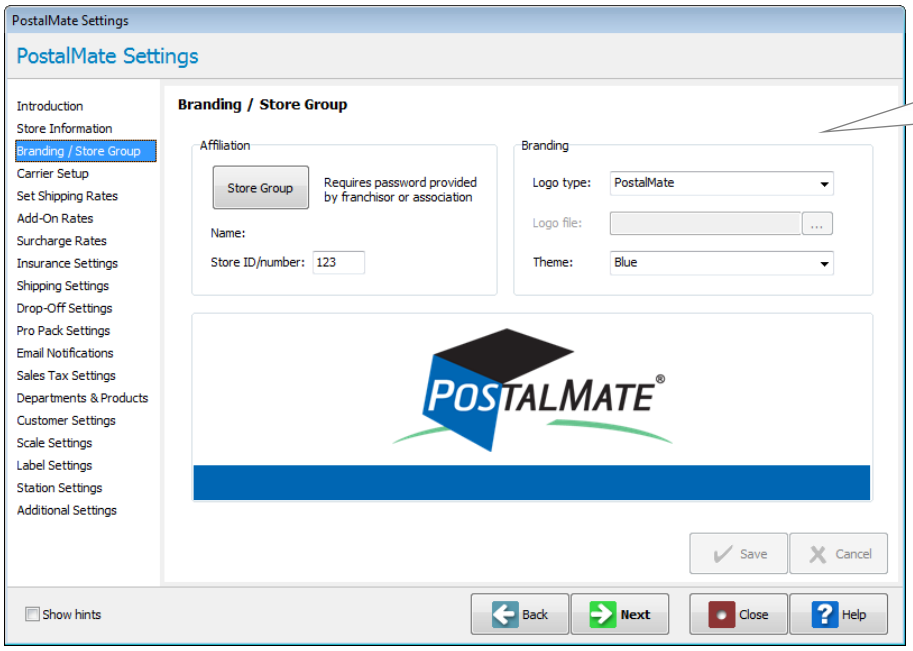
Enter Store Group

- Your Store Group refers to affiliations you may have such as a franchise, trade organization or chain of locations.
- If you are not affiliated with a Store Group, click “Next”.
- Obtain your Store Group password from the group with which you are affiliated. This password is not available from PC Synergy.
- Click the “Set Store Group” button and enter your password.
- If you belong to a store group that assigns a store ID, you may enter it at this time. This store ID is required by some franchises.
- You may choose to display your store group’s logo or use your own logo. This logo will display on the main shipping screen.



See TechNote titled [Custom Logo in PostalMate] for more information on setup.

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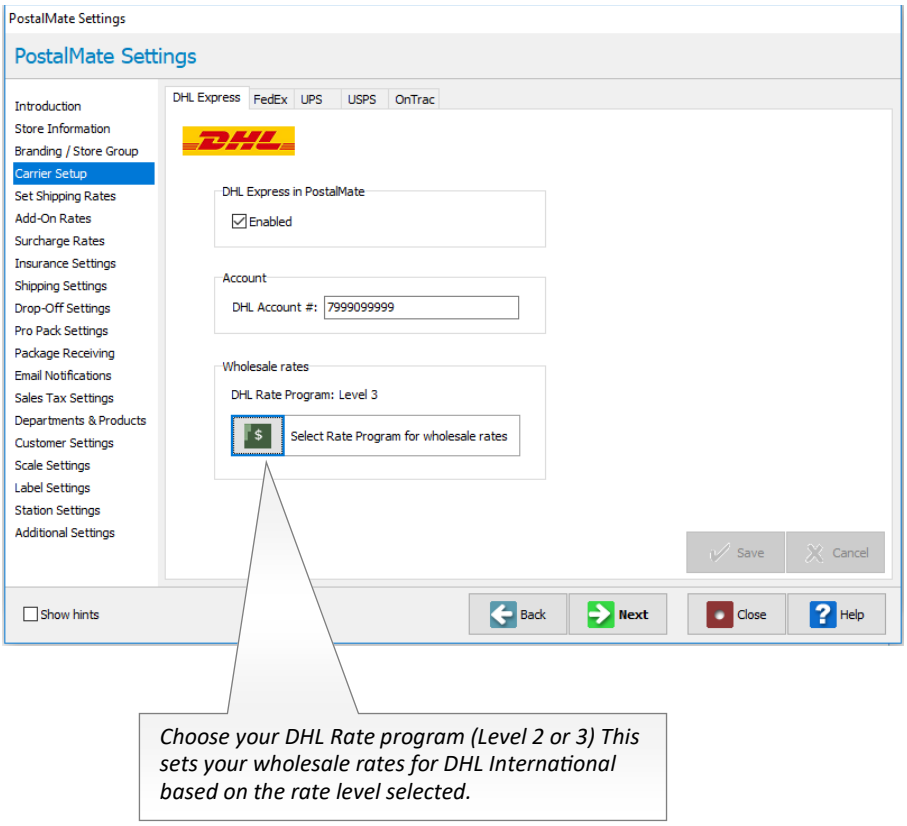
Carrier Setup

This section is where all carrier accounts can be set up. This includes: Enabling the carrier to be used in the store, entering your carrier account numbers, any type of registration as needed by the carrier as well as setting your discount rate levels.

▶ Complete DHL Setup

- If you ship DHL International in your store, check the box that says "DHL Used in this store".
- Enter your DHL account number.
- Choose your DHL Rate Program.



Choose your DHL Rate program (Level 2 or 3) This sets your wholesale rates for DHL International based on the rate level selected.

- A PostalMate Premium Services Agreement must be filled out and sent to PC Synergy to begin any online shipping activity in PostalMate.

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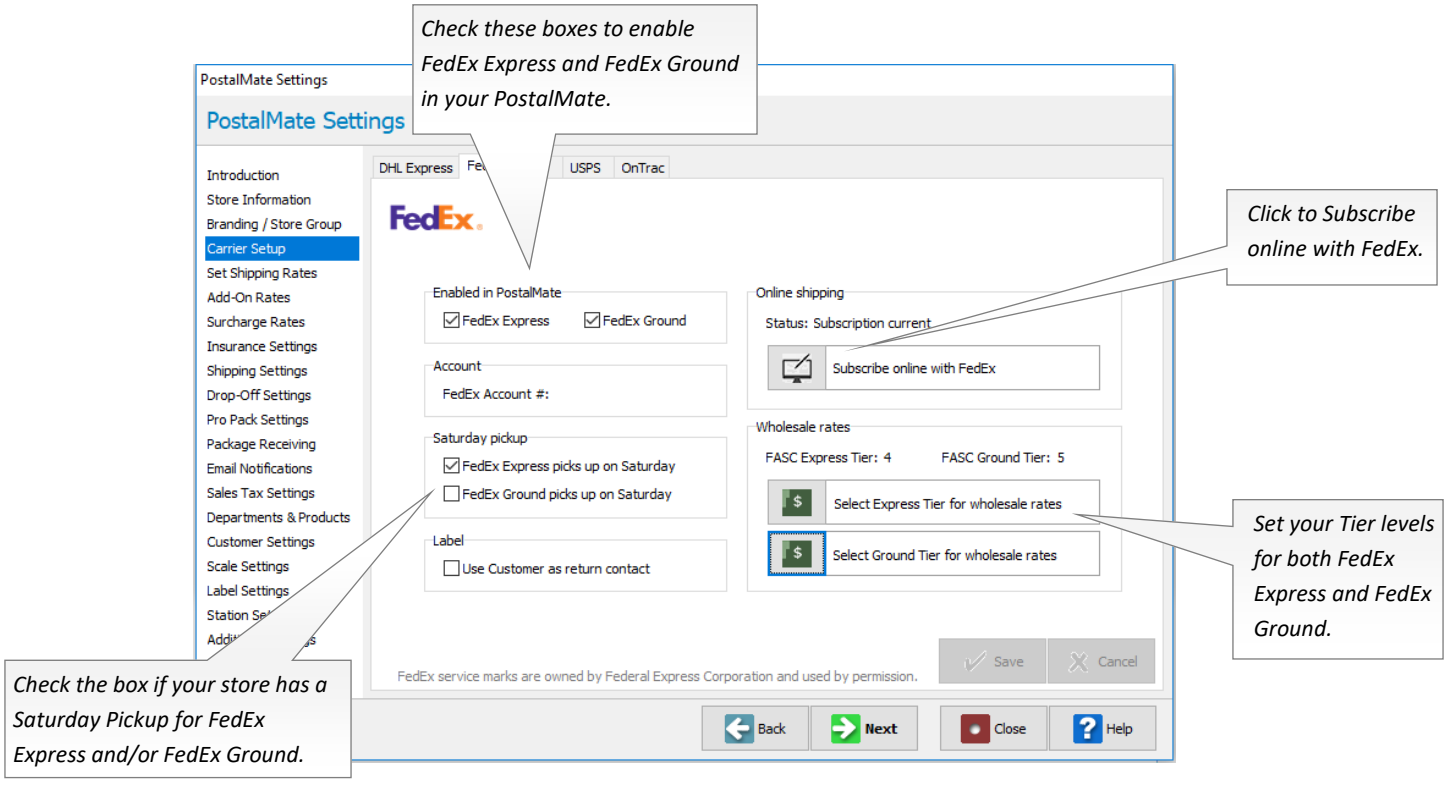
▶ Complete FedEx Express and FedEx Ground Setup

- Click “Subscribe online with FedEx” and enter your FedEx account number.
- Click “Send” to subscribe to the FedEx Data Center and enable your system for FedEx Express online activities. (This process will also register your account with FedEx Ground).
- Set your wholesale rates (the rate you pay to FedEx) by clicking the button “Select Tier and set wholesale rates”. Do this for both FedEx Express and Ground.
    - ◊ Select the appropriate FedEx Tier and choose “Apply” to set your wholesale rates.
    - ◊ If you do not know your Tier(s), visit [www.FASCnet.com.](http://www.FASCnet.com)



- Subscribing online with FedEx allows you to ship both domestic and International shipments through PostalMate.
- Subscribing online with FedEx allows you to ship both domestic and FedEx International Ground Canada shipments through PostalMate.
- A PostalMate Premium Services Agreement must be filled out and faxed back to PC Synergy to begin any online shipping activity in PostalMate.

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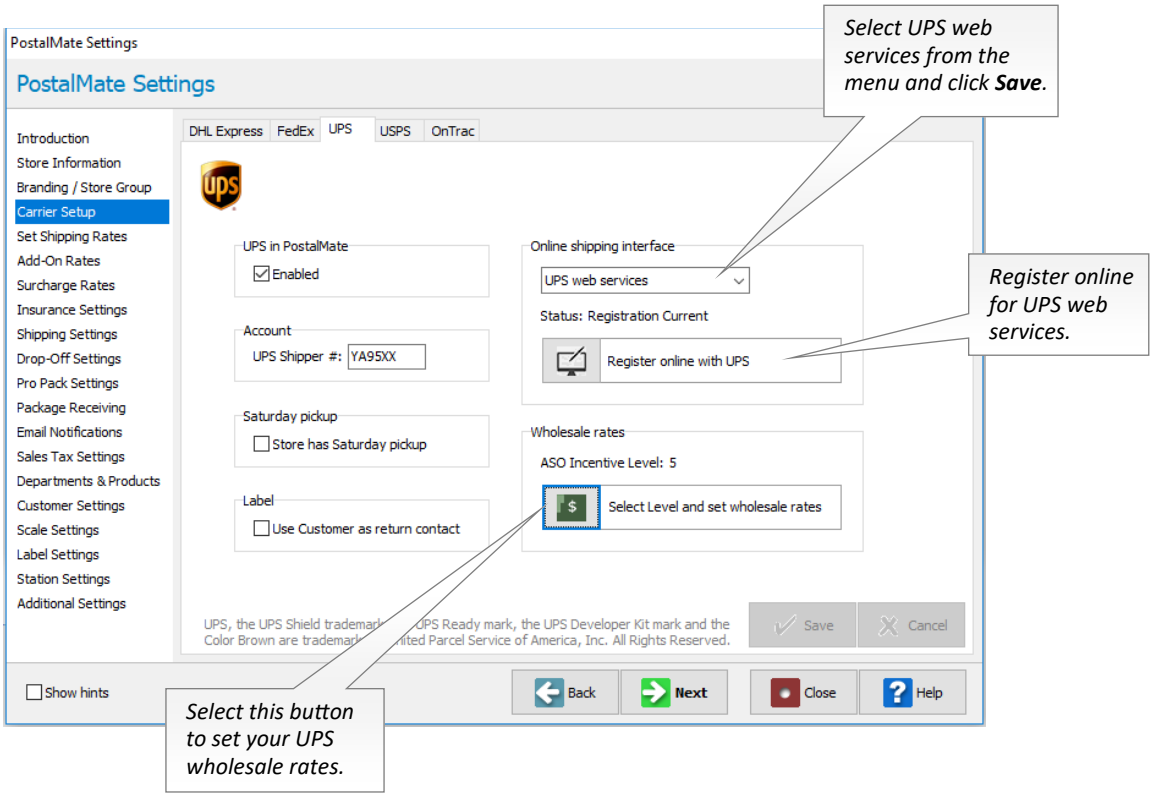
Complete UPS Setup

- Select UPS web services below “Online Shipping Interface”.
- Enter your UPS Shipper number.
- Click “Register online with UPS”. Verify your store information and click “Next”.
- You will be prompted to enter information from a past UPS invoice. This information is required. You must fill in and then click “Next”.
- Review and accept the UPS Access License. Scroll to the bottom of the Access License to accept the terms and click “Next.”
- You will receive a “Registration Successful” message once complete.
- Set your wholesale rates (the rate you pay to UPS) by clicking the button “Select Level and set wholesale rates”.
    - ◊ Select the appropriate UPS ASO level and choose “Apply” to set your wholesale rates.
    - ◊ If you do not know your UPS ASO level, contact your UPS Representative.



- Registering online with UPS allows you to ship both domestic and International shipments through PostalMate.
- A PostalMate Premium Services Agreement must be filled out and faxed back to PC Synergy to begin any online shipping activity in PostalMate.

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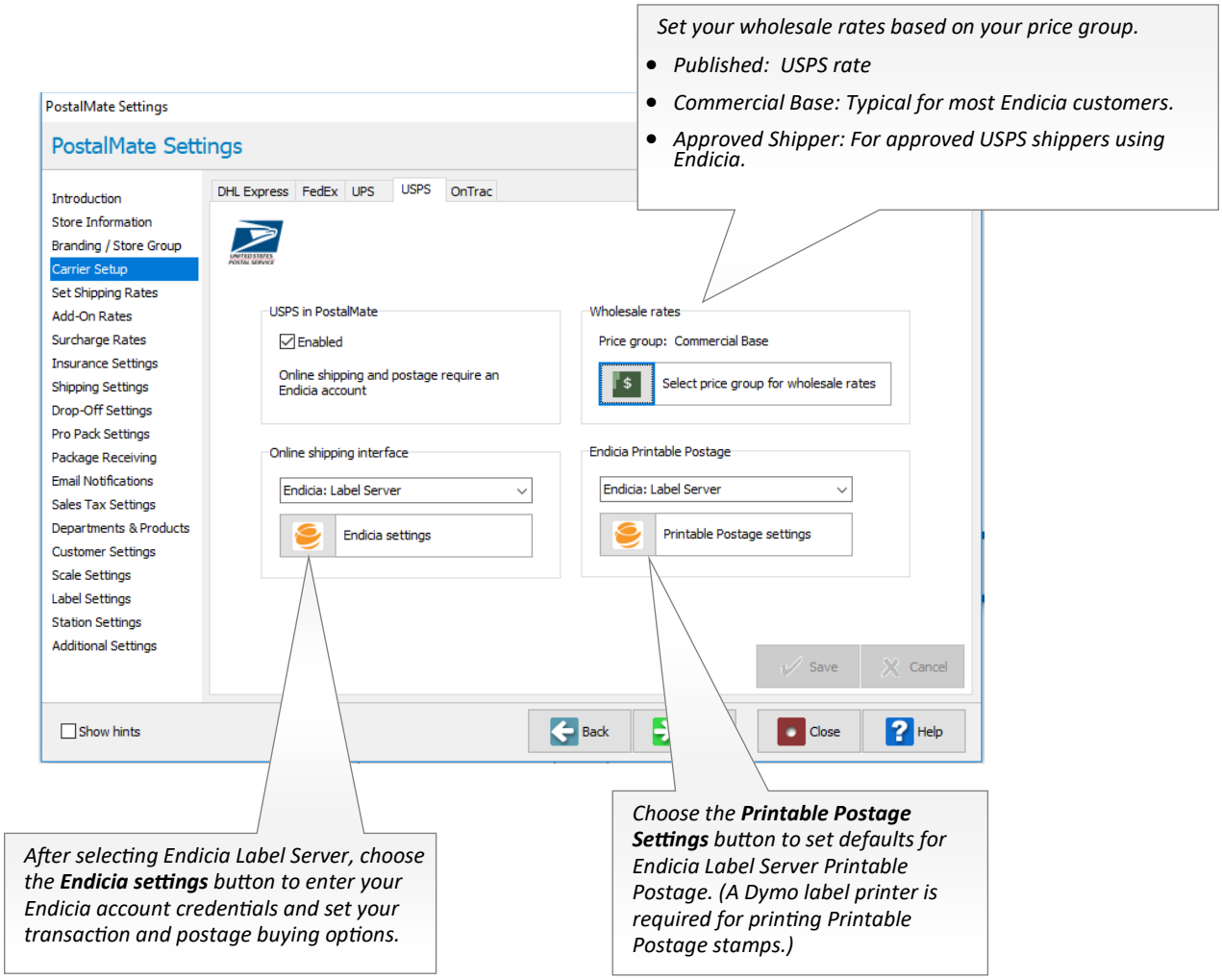
▶ Complete USPS Setup

- Check the box if you ship USPS in your store.
- You can print postage for parcels, flats and even a single stamp with PostalMate's Endicia interface. An Endicia account is required. Visit www.endicia.com/postalmate to set up an account (the first 60 days is free when using this link).
    - ◊ Printable Postage is available when you establish an Endicia account, and allows you to print postage stamps to a Dymo label printer. See TechNote titled Endicia Label Server Printable Postage for detailed setup instructions.
    - ◊ The Endicia Label Server interface works via online shipping and requires no additional software. See TechNote titled Setting up Endicia Label Server for detailed setup instructions.
- If you do not use the Endicia interface, you can set up USPS to get rates and print generic shipping labels and apply postage manually.



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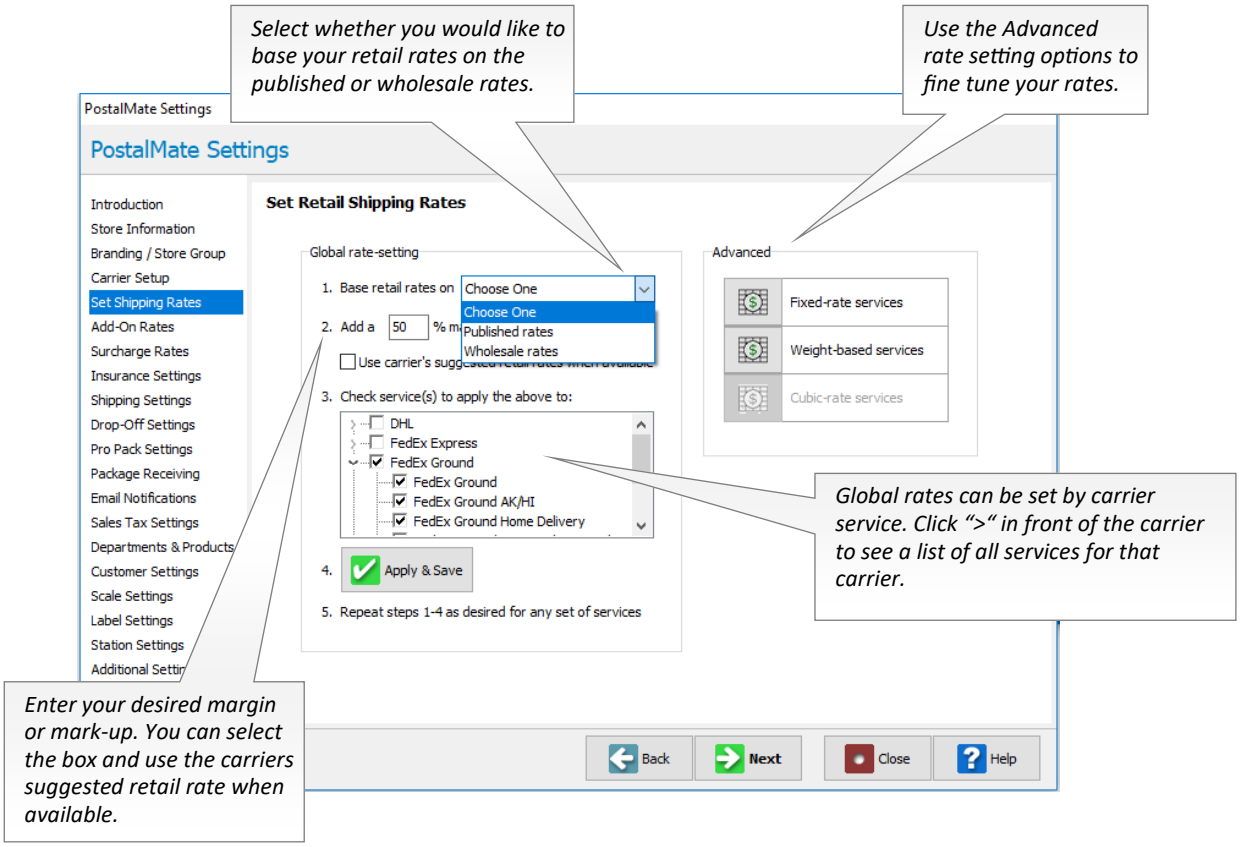
Set Shipping Rates

Use the Global Rate Setting method to quickly set rates for all carriers and services.

- Use the drop-down box to select whether you would like to base your retail rates on published or wholesale rates.
- Enter your desired margin or mark-up.
- Check the box for each carrier you wish to apply this margin or mark-up or to. If you would like to choose specific services within a carrier you may expand the tree of services by clicking ">" in front of the carrier name.
- Click the **Apply & Save** button to save your changes.



Repeat these steps as necessary until all rates are set. You may set rates with greater detail or fine tune your global rate setting by choosing the "Advanced" button for both Fixed and Weight based services. For more information on advanced rate setting click the "Help" button from the Set Shipping Rates menu. See an example of the Advanced Rate Setting screen on the next page.

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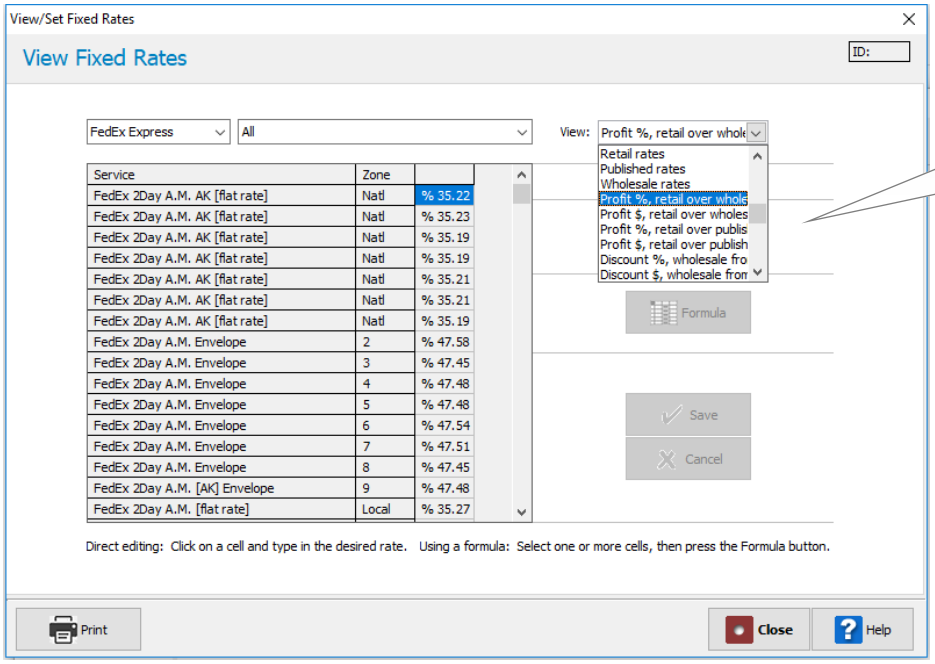
▶ Set Shipping Rates continued…



The Advanced Rate Setting screen allows you to view the rates you have set in different ways.

Rate Categories Defined:

- **Retail**: The rates you charge your customer.
- **Published Rates**: The rates found in the carrier's published literature.
- **Wholesale**: The tier/level rates you pay the carrier for your shipping. This is often based on a group association or volume.
- **Carrier-Suggested Retail**: Often this rate is what a store owned or operated by the carrier will charge.

Pricing Strategies Defined:

- **Margin**: Refers to the percent of the transaction you wish to keep. Setting your rates to a 50% margin means you wish to keep 50% of the shipment transaction. In order to do this you will be doubling the rate you are basing your margin on. A 50% margin on $1.00 equals $2.00.
- **Mark-up**: Refers to the percent of the wholesale cost you wish to add to create your retail rate. Setting your rates to a 50% mark-up means you will take half of the original rate and add it to create a retail rate. A 50% mark-up on $1.00 equal $1.50.
- **Retail rates based on Published**: Setting your retail rates based on published means you will be adding your mark-up or margin to the carrier's published rates.
- **Retail rates based on Wholesale**: Setting your retail rates based on wholesale means you will be adding your mark-up or margin to the carrier's wholesale rates.
- **Retail rates based on Carrier's Suggested Retail Rates**: PostalMate will also allow you to set rates equal to a carrier's suggested retail rate.

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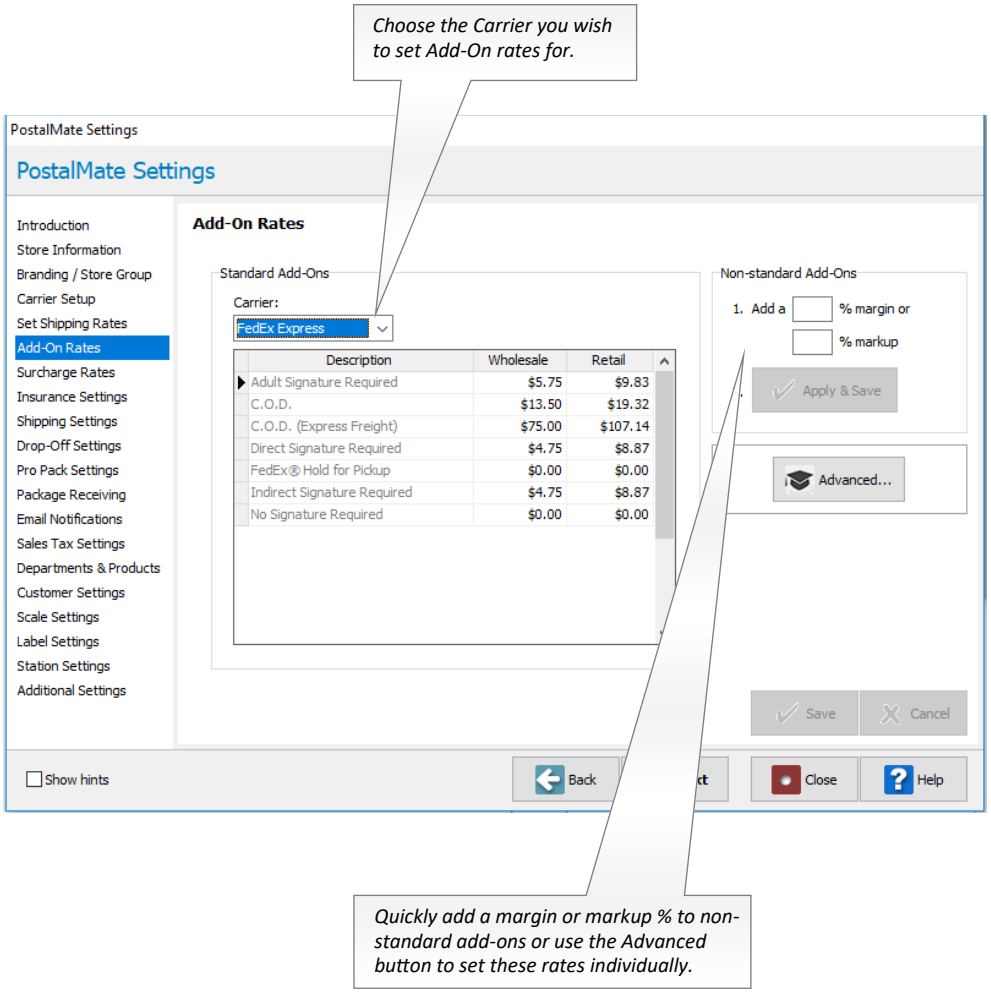
▶ Set Add-On Rates

Each carrier has "Add-On" services for which rates need to be set. These are optional services a customer may wish to add to a shipment.

- Select the carrier you wish to set rates for.
- The wholesale rate is provided for you. Simply enter the retail rate you wish to charge your customer for this service.
- Complete this process for each carrier.
- Some Add-On services do not have standard flat fees. In these cases you may enter a margin or mark-up in the Non-standard area, or click "Advanced" to set these rates individually.



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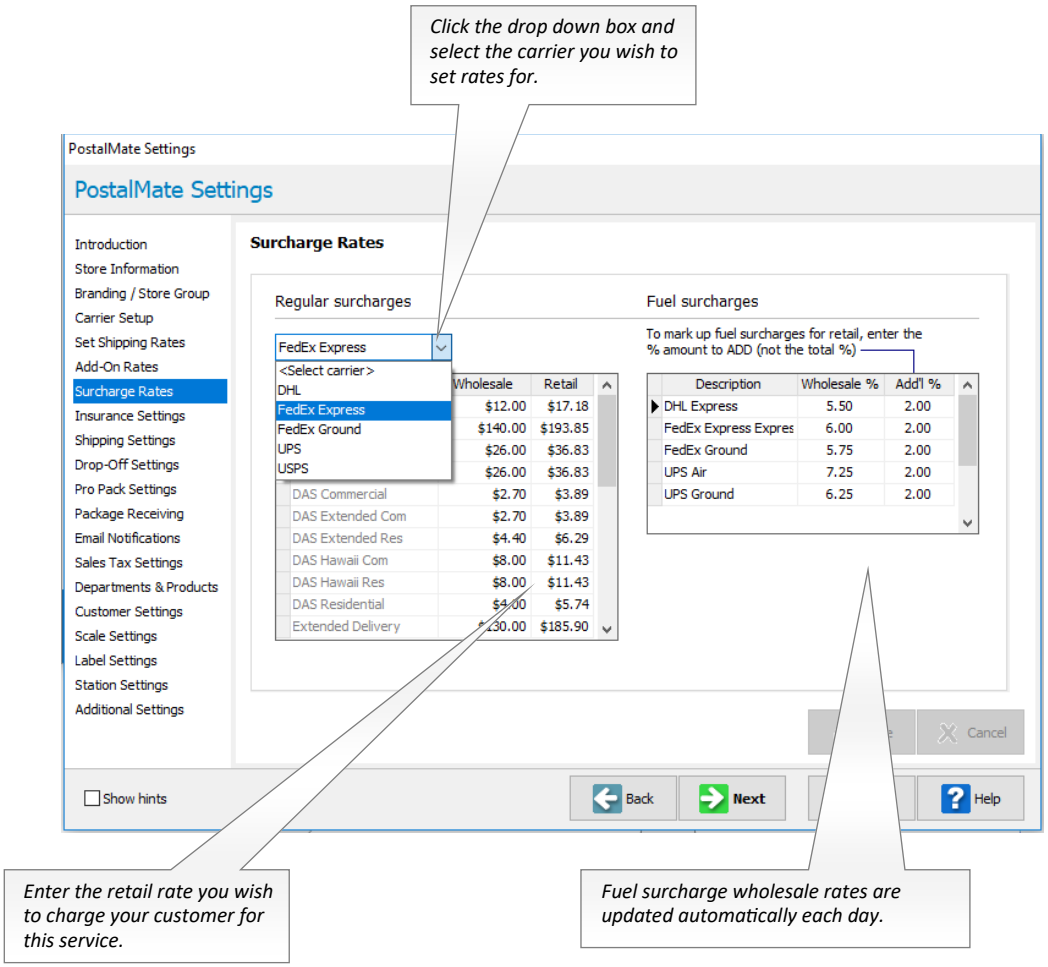
Set Surcharge Rates

Surcharges are those fees a carrier may add to a given shipment to cover the cost of additional handling, rural delivery or fuel. This screen allows you to set your retail rates for each of these surcharges. PostalMate will automatically add surcharges when they apply based on the information you enter for the shipment.

- Use the drop-down box to select the carrier you wish to set surcharge rates for.
- The wholesale rates are in the left hand column. Enter the dollar amount you wish to charge in the right hand column.
- Fuel surcharges: PC Synergy will use the eUpdate feature to send you the current fuel surcharge rates. You may enter an additional percentage in the "Addt'l" column if you choose to charge a greater percentage than that of the carrier.



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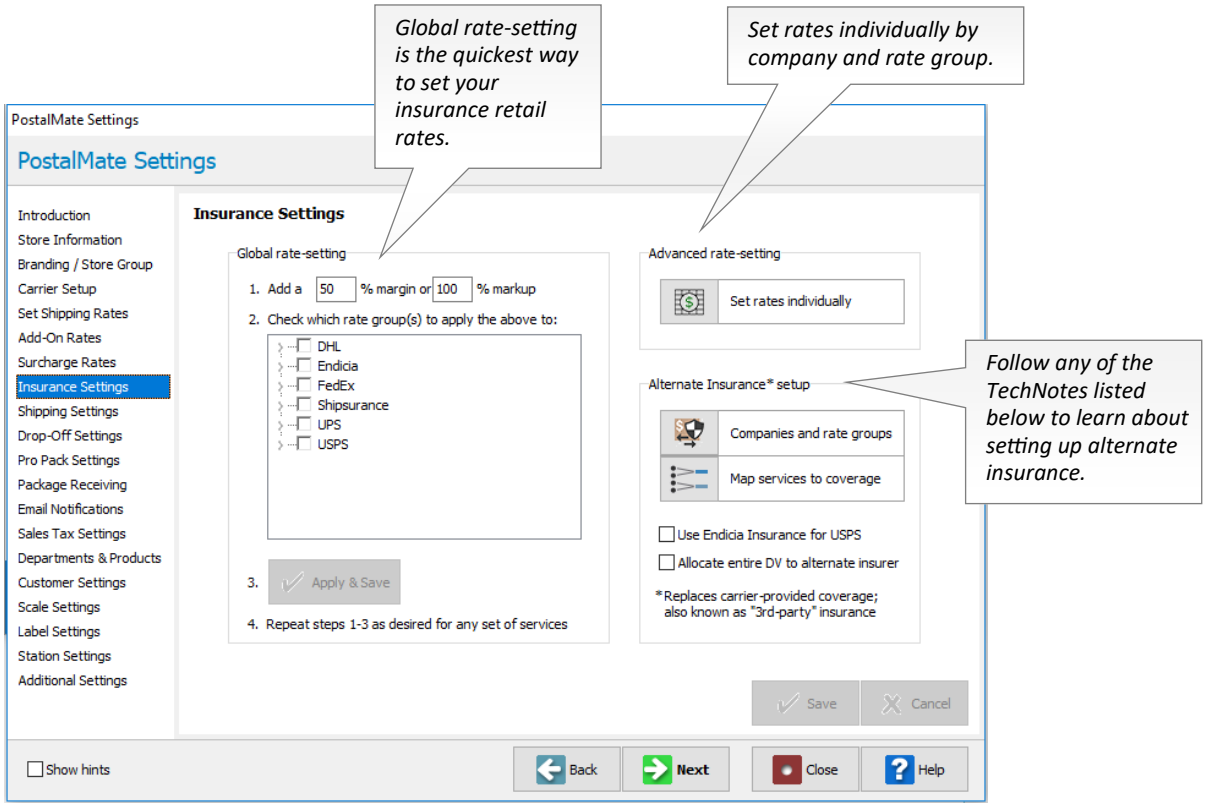
Set Insurance Rates

Like setting your shipping rates, PostalMate allows you to set insurance rates globally or individually for each carrier.

- Global rate-setting: Enter the margin or markup percentage you wish to apply. Place a checkmark in front of each group(s) you wish to apply the increase to. Click Apply & Save.
- Advanced rate-setting: Use this option to set insurance rates individually by company and rate group.
- See TechNote titled Insurance Rate-Setting for detailed rate-setting instructions.



PostalMate supports Shipsurance and Endicia insurance as alternate insurance carriers. Other alternate insurance carriers can be added manually as desired.

- Shipsurance: See TechNote titled Shipsurance Setup for detail setup information.
- RS Package Insurance: See TechNote titled RS Package Insurance Setup.
- Endicia Insurance: See TechNote titled Endicia Parcel Insurance for details.
- Other Alternate Insurance: See TechNote titled Adding Alternate Insurance.

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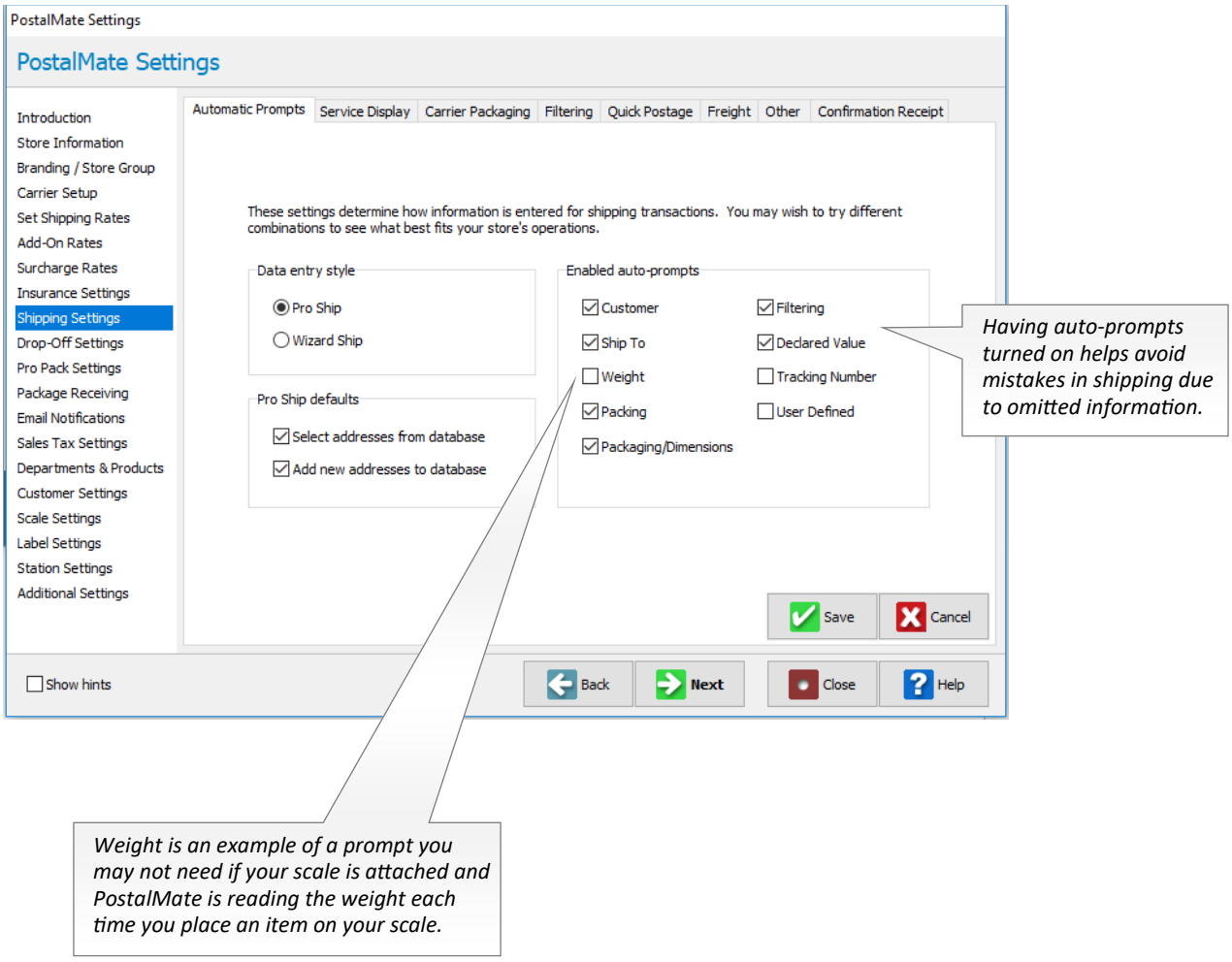
Shipping Settings

Automatic Prompts

Customize your shipping process by choosing which prompts you want to display.



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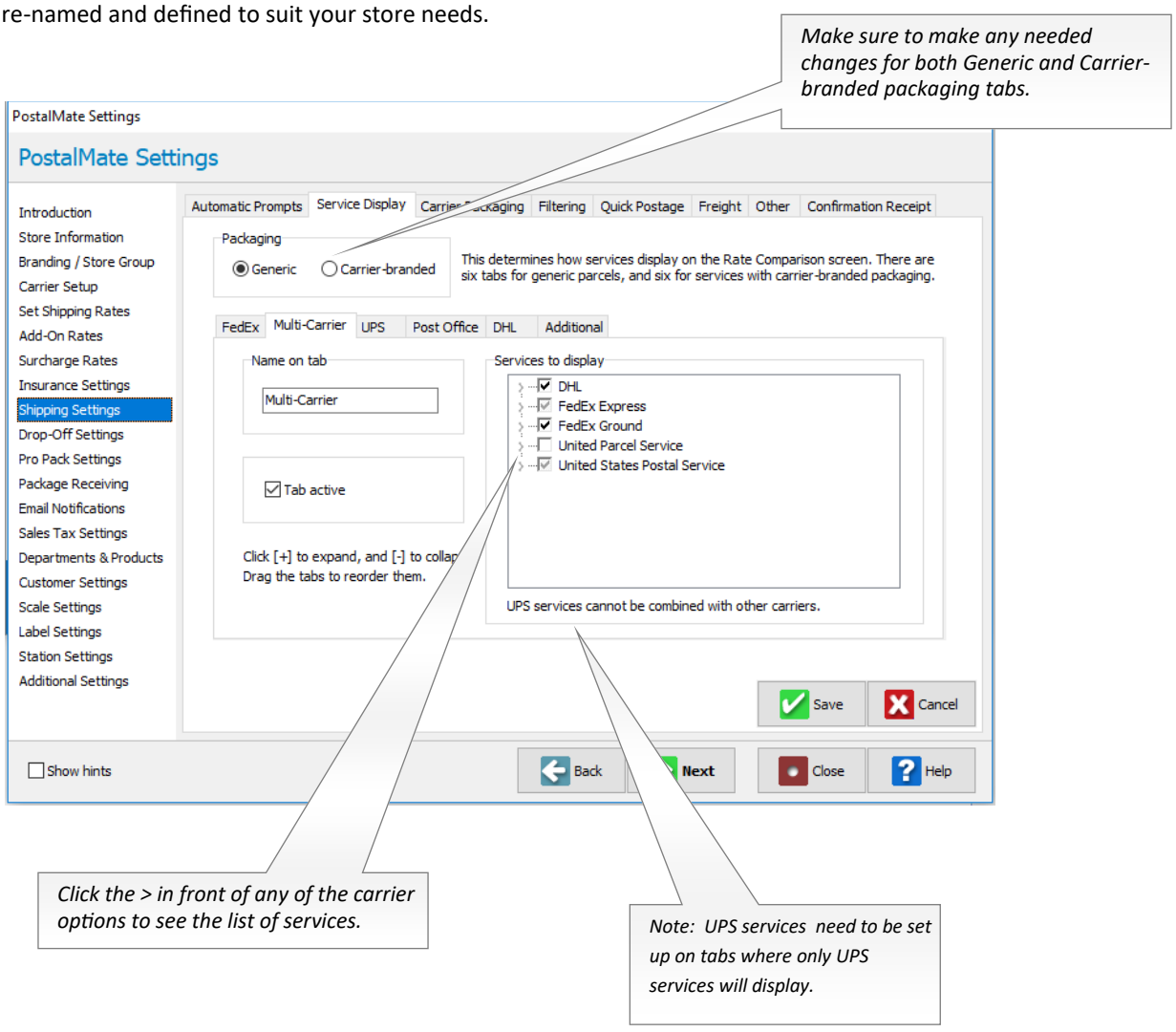
▶ Shipping Settings continued...

Service Display

Determine which carriers and their services you would like on a given tab. You have six tabs for Generic packaging (regular parcels) and six tabs for Carrier-branded packing that can be re-named and defined to suit your store needs.



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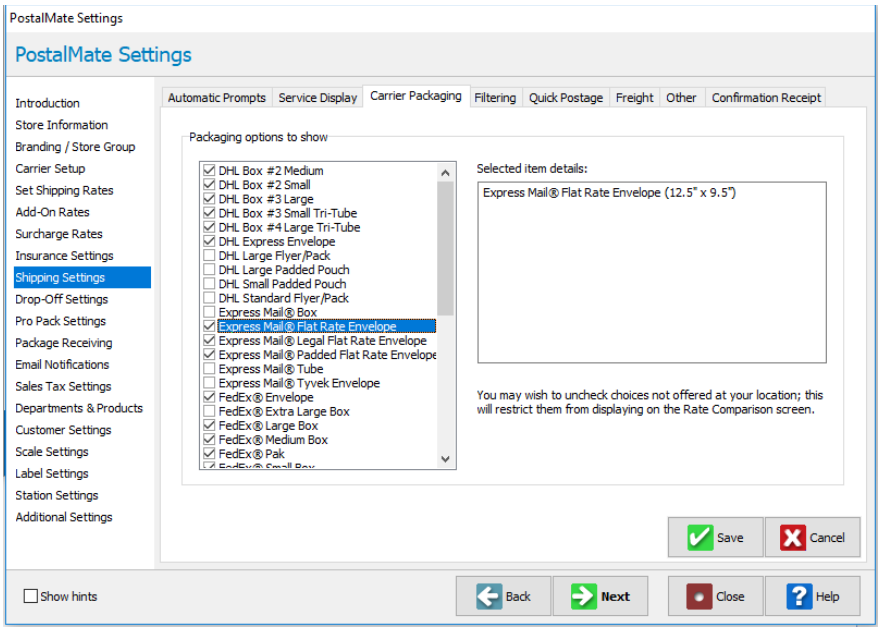
▶ Shipping Settings continued...

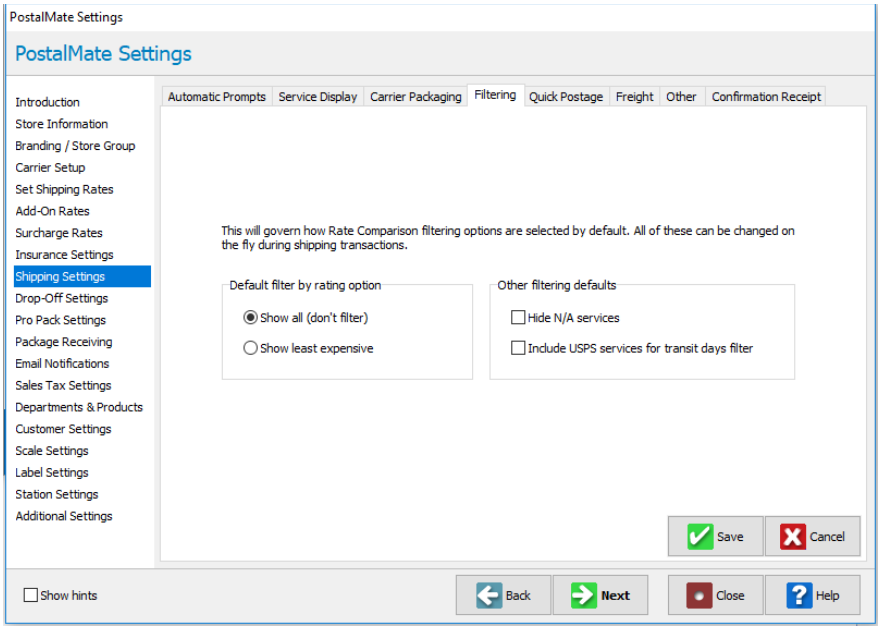
Carrier Packaging Display

The carriers offer many different options based on the shape of the packaging. Here you can choose which packaging you offer in your store and uncheck those you do not offer so they will not display on the Rate comparison screen.



Filtering on Rate Comparison

These defaults are used for the Rate Comparison Filtering prompt, allowing you to narrow the choices of services you display on the Rate Comparison Screen.



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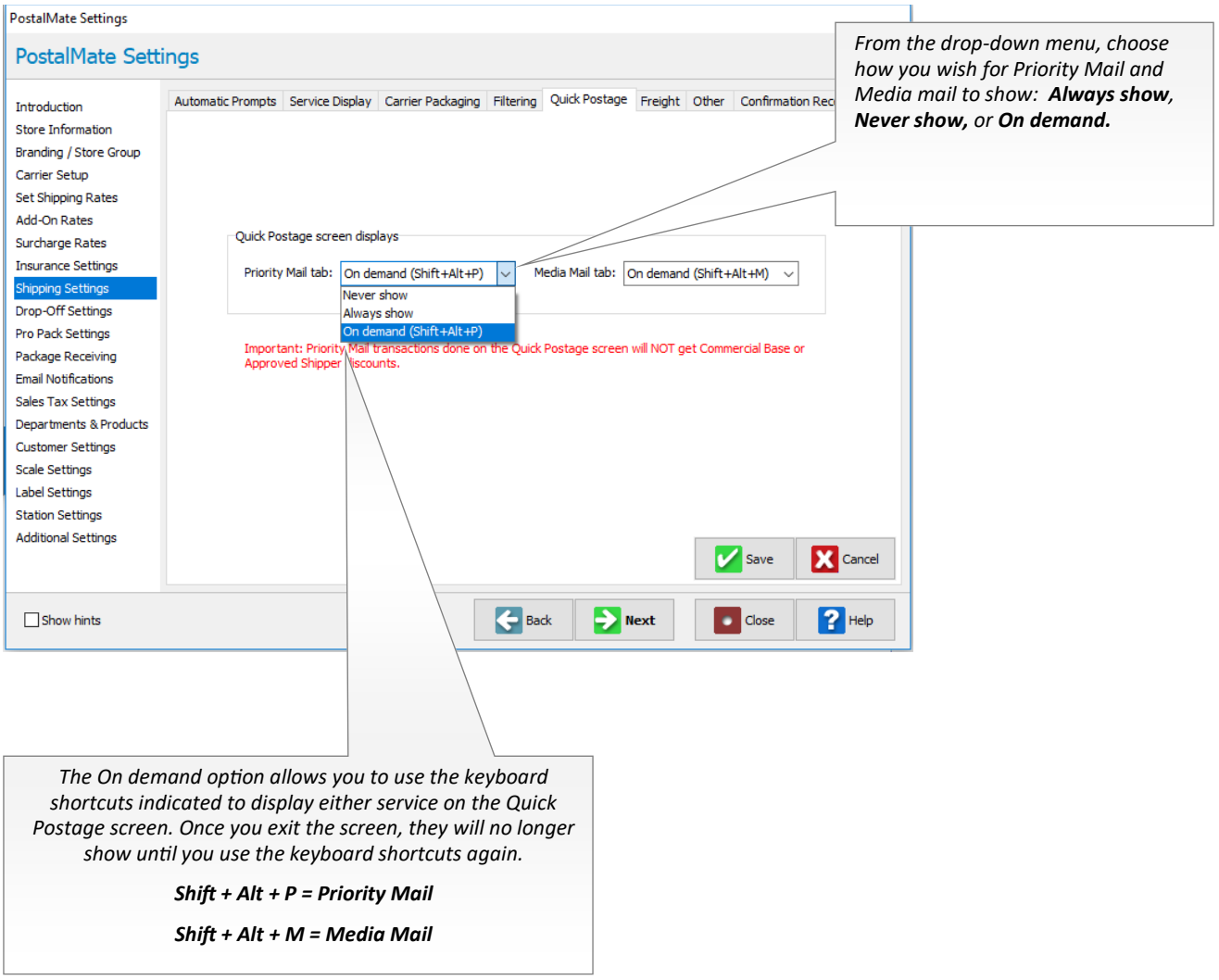
▶ Shipping Settings continued…

Quick Postage Settings

By default, First Class Mail, Priority Mail and Media Mail tabs will display on the Quick Postage screen. If you wish for Priority Mail and/or Media mail to not show (or show on demand) you can set your defaults here. ***Note: Priority Mail transactions done on the Quick Postage screen will NOT get Commercial Base or Approved Shipper discounts.***



From the drop-down menu, choose how you wish for Priority Mail and Media mail to show: ***Always show,*** ***Never show,*** *or* ***On demand.***

The On demand option allows you to use the keyboard shortcuts indicated to display either service on the Quick Postage screen. Once you exit the screen, they will no longer show until you use the keyboard shortcuts again.

Shift + Alt + P = Priority Mail

Shift + Alt + M = Media Mail

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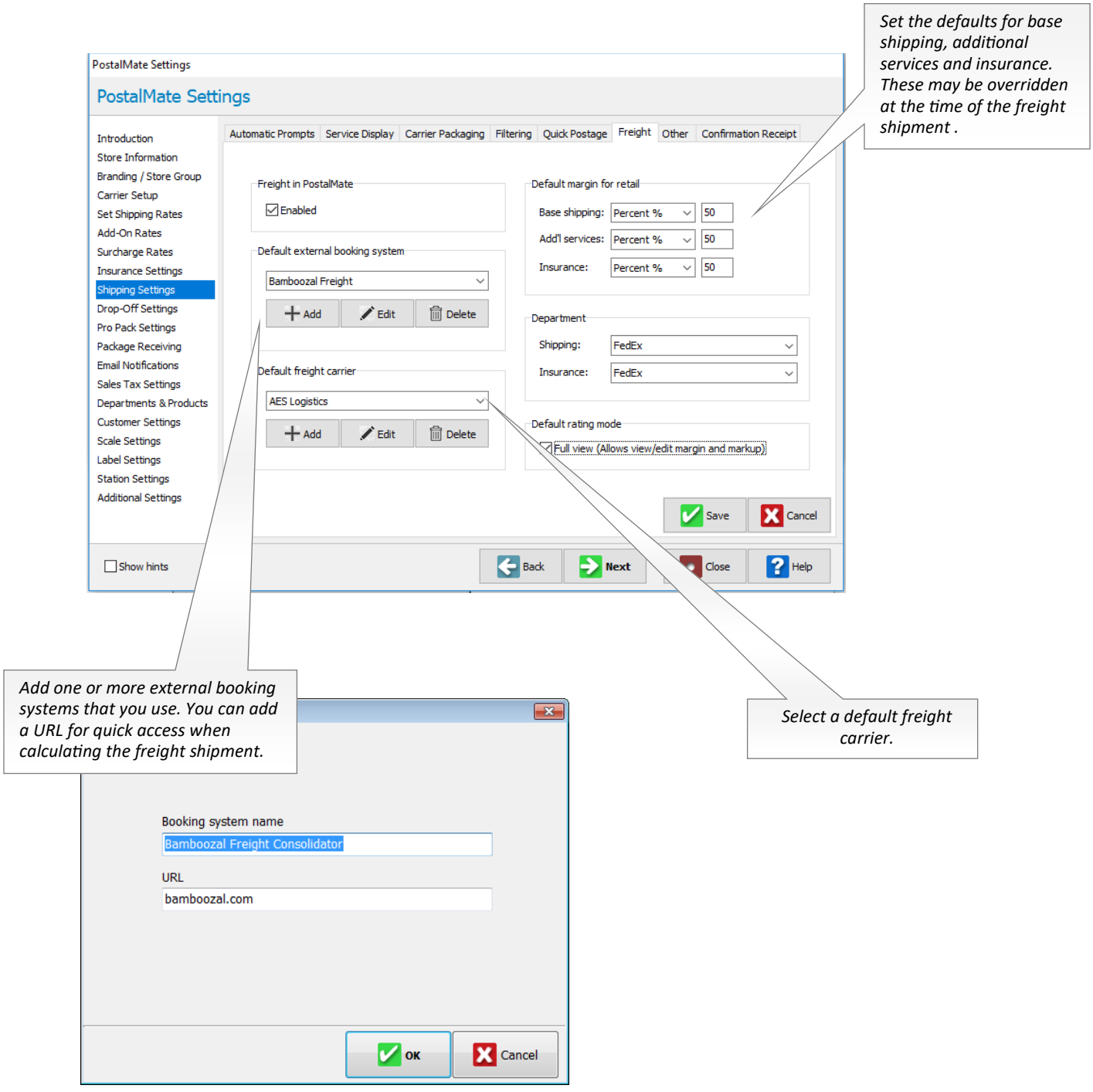
▶ Shipping Settings continued...



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▶ Shipping Settings continued…

The "Other" tab

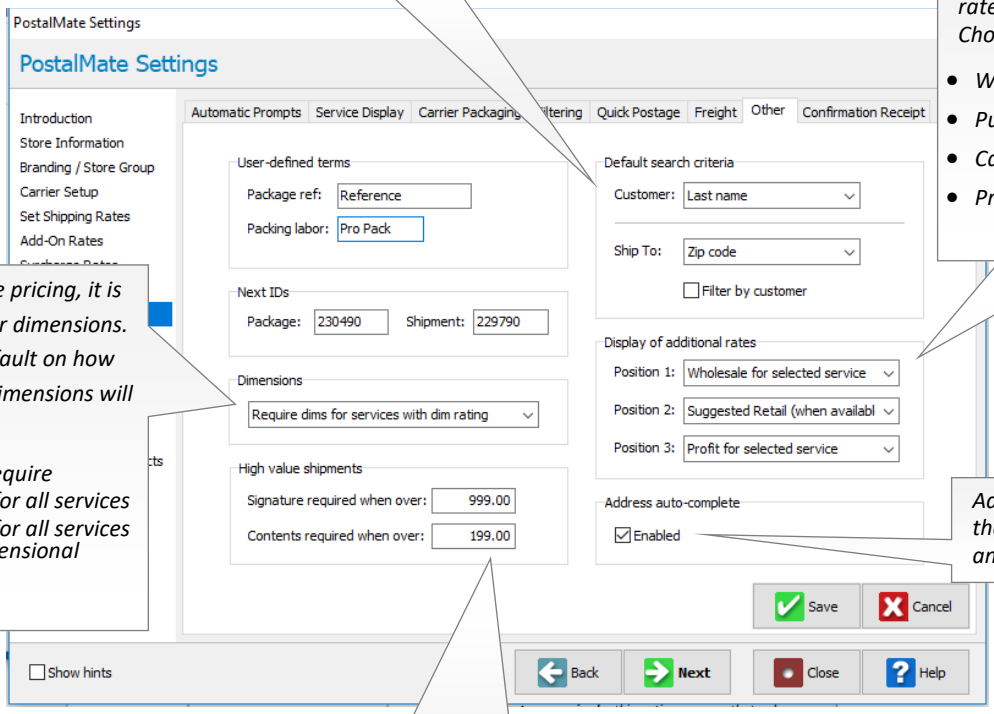
Here you can change the following

- User-defined terms
- Default search criteria
- Option to require dimensions entry for all packages
- Display of additional rates on the Rate Comparison screen (hidden as A, B, C and D)
- High value shipment options

Do you search your customers by phone number? This is where you would make this your default search option.

Choose which 3 optional "hidden" rates will display in PostalMate. Choose from…

- *Wholesale*
- *Published*
- *Carrier Suggested Retail*
- *Profit amount*



For accurate pricing, it is best to enter dimensions. Set your default on how and when dimensions will be required.

1. *Do not require*
2. *Require for all services*
3. *Require for all services with dimensional rating*

Address Auto-Complete works on the ShipTo screen for domestic and Canada addresses.

***Signature required**—this option ensures that only services that offer a signature service display on rate comparison when the value of the shipment is higher than what is entered in this field.*

***Contents required**— This option ensures that the content description needs to be entered into PostalMate if the value is higher than the amount you entered here.*

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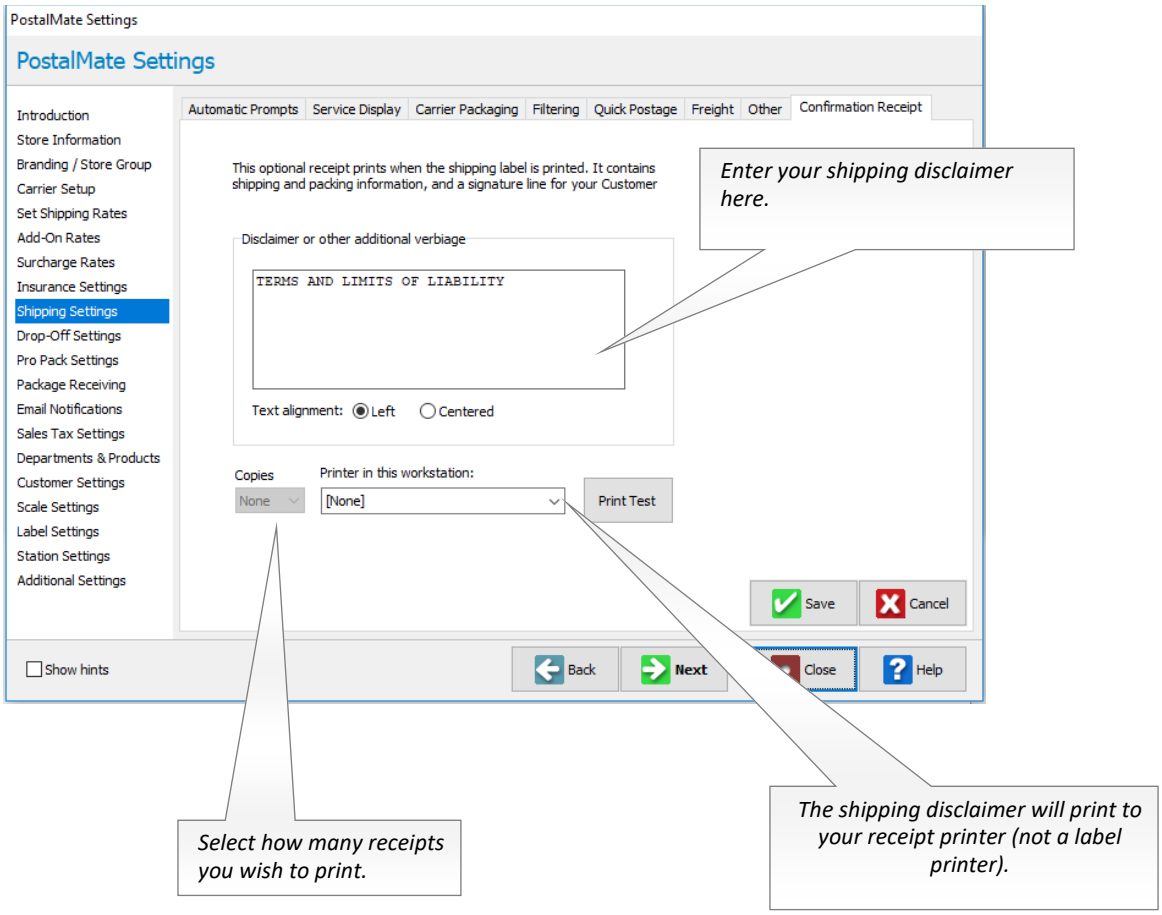
▶ Shipping Settings continued...

Confirmation Receipt

This is an optional receipt that prints for each shipment and includes shipping and package information as well as a signature line for your customer.



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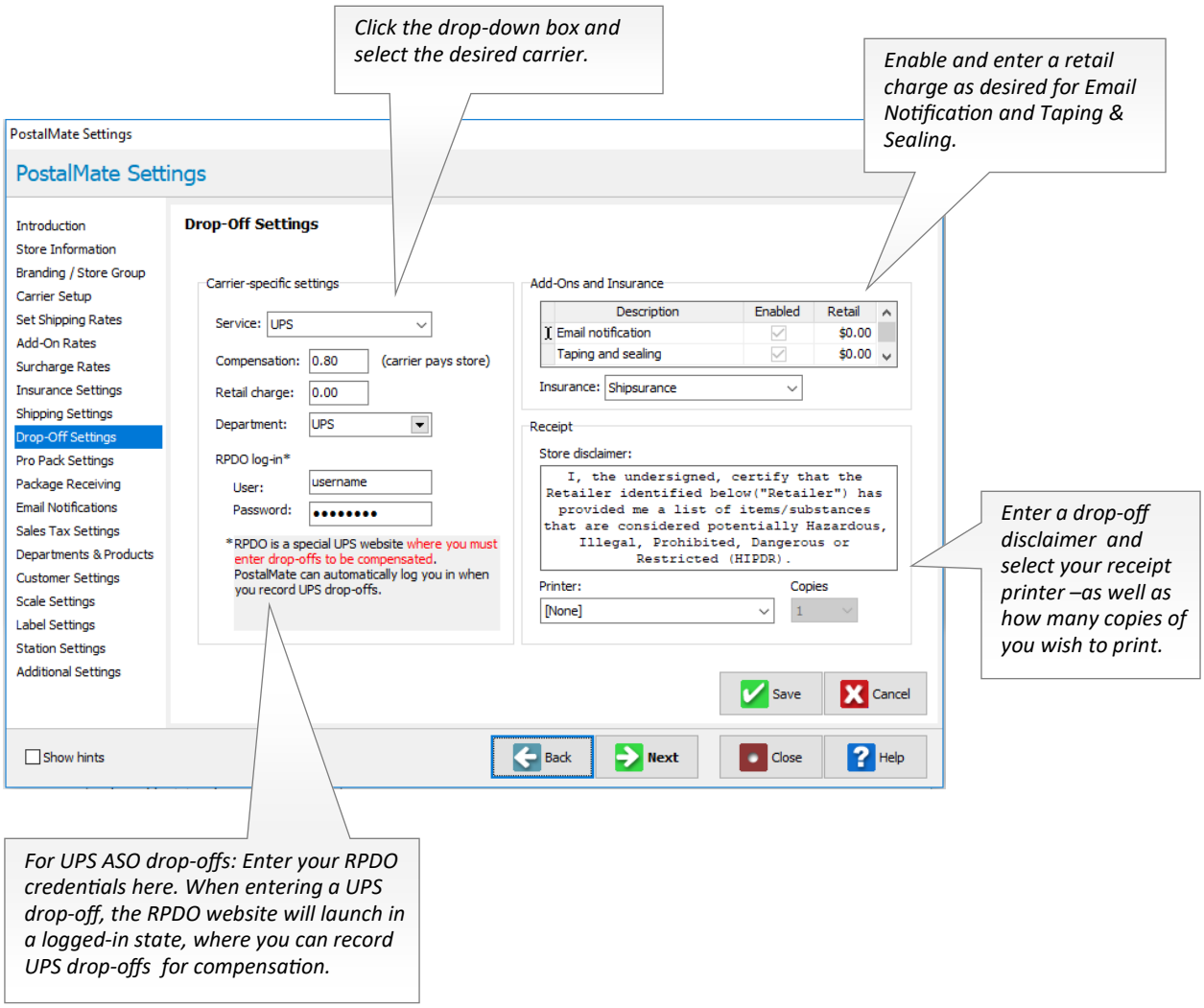
Setup Drop-Offs

- Select a carrier then enter a Compensation amount or a Retail Charge. Select a Department (this is for retail charges associated with drop-offs that will be carried over to the CashMate Register).
- Optional Add-Ons for Email Notification and Taping & Sealing: Check the box "Enabled" and enter a retail amount as desired. (Note: Email notification for regular shipments must be enabled to use the drop-off email notification add-on).
- Drop-Off Receipts: Enter a drop-off disclaimer. Select your receipt printer and choose how many copies you wish to print.



- See Technote titled Setting up and Recording Drop-Offs for detailed information.

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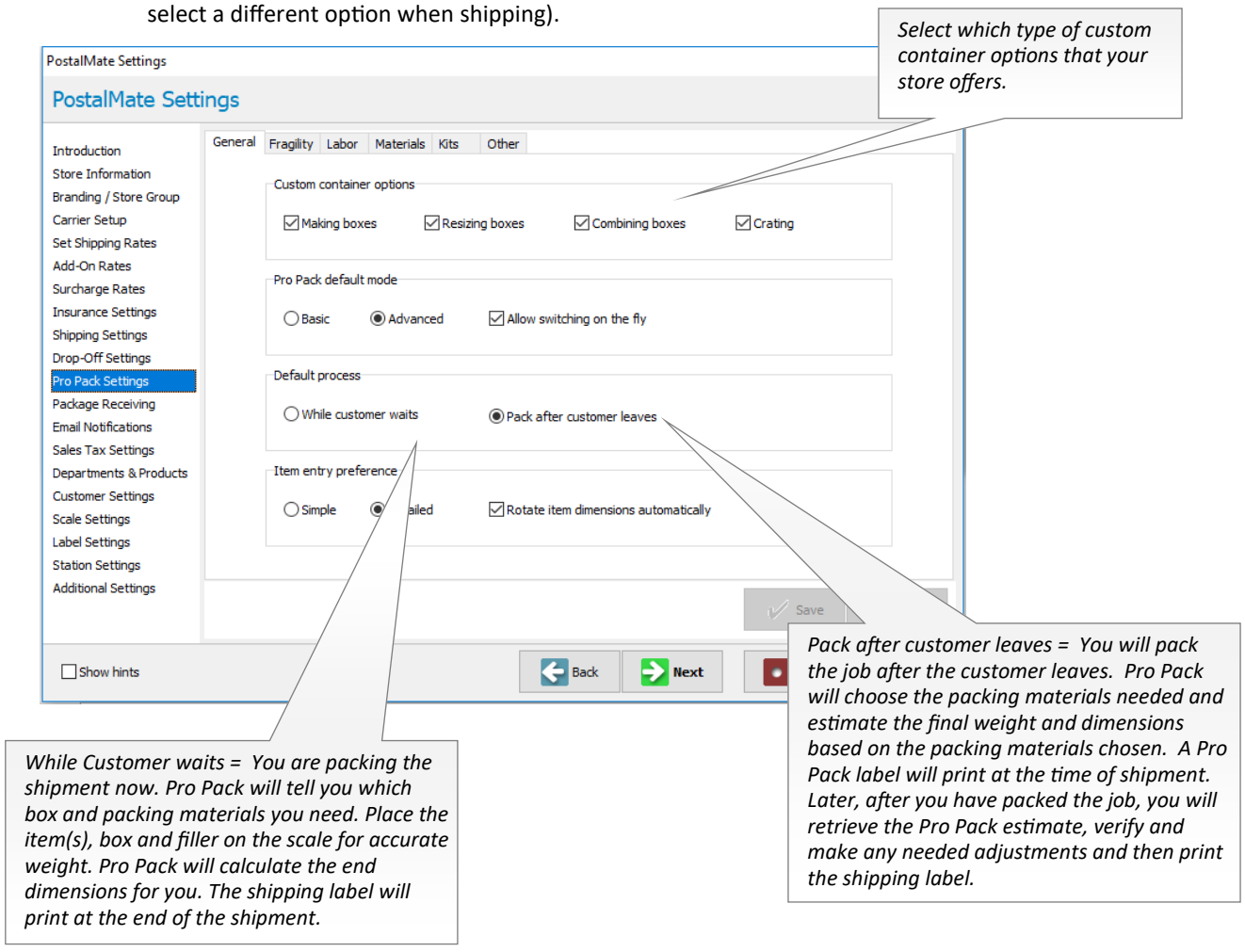
Setup Pro Pack

Pro Pack is the most advanced packaging and package estimating system you will find in the retail shipping industry.

When PostalMate knows the packing material inventory of your store, your labor pricing and packing preference, the software can do the rest. You will get a consistent pack job estimate each and every time.

- **Custom Container Options**: Labor amounts can be assigned by how complex a packing job is. Choose the default complexity for your store by placing a check mark in the box below default.
- **Item entry preference**: Select your default filler from the drop down list.
- **Default Process**: Choose Pack Now or Pack Later as your default. (you can always select a different option when shipping).



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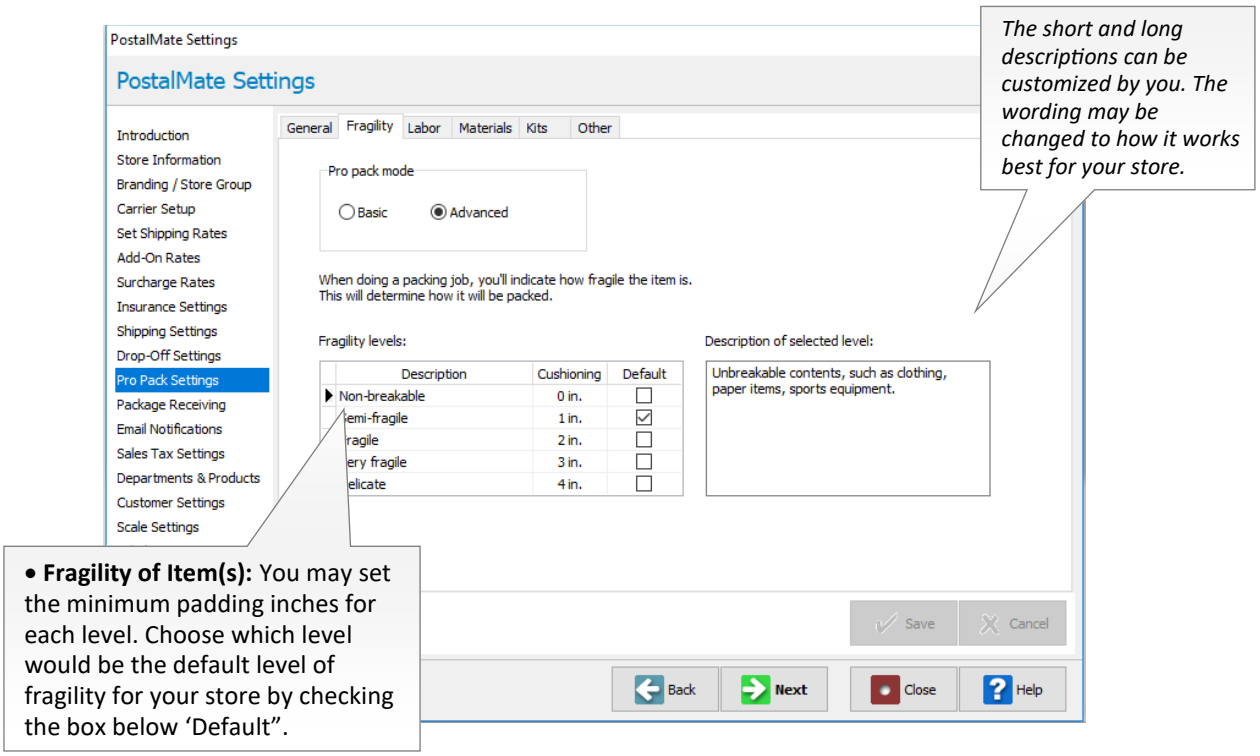
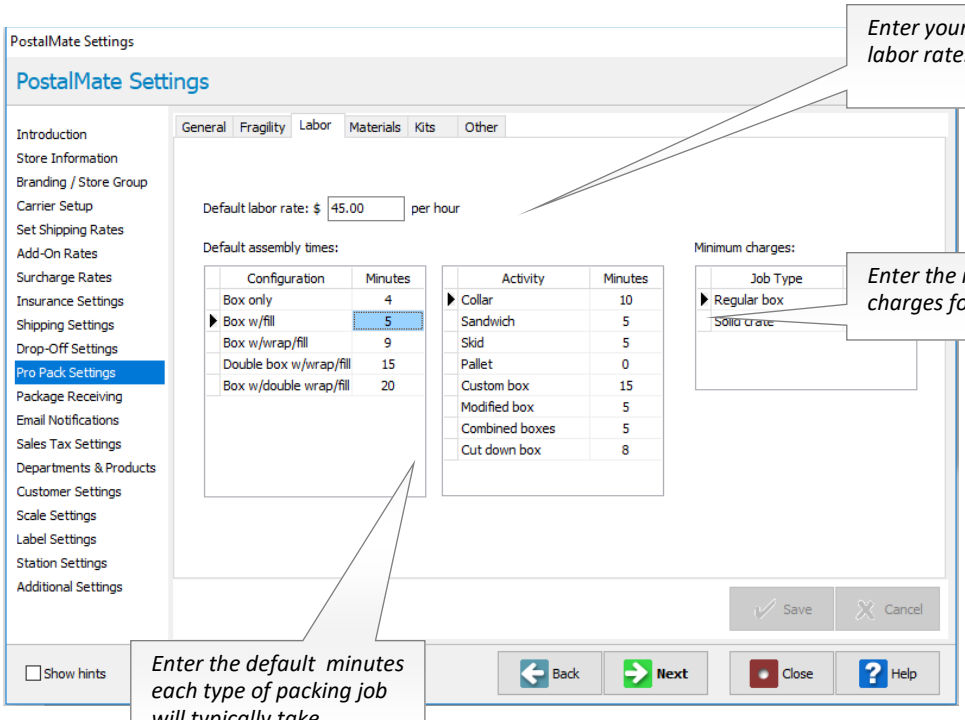
▶ Setup Pro Pack continued...



The short and long descriptions can be customized by you. The wording may be changed to how it works best for your store.

• **Fragility of Item(s):** You may set the minimum padding inches for each level. Choose which level would be the default level of fragility for your store by checking the box below 'Default".



Enter your default per hour labor rate.

Enter the minimum charges for each job type.

Enter the default minutes each type of packing job will typically take.

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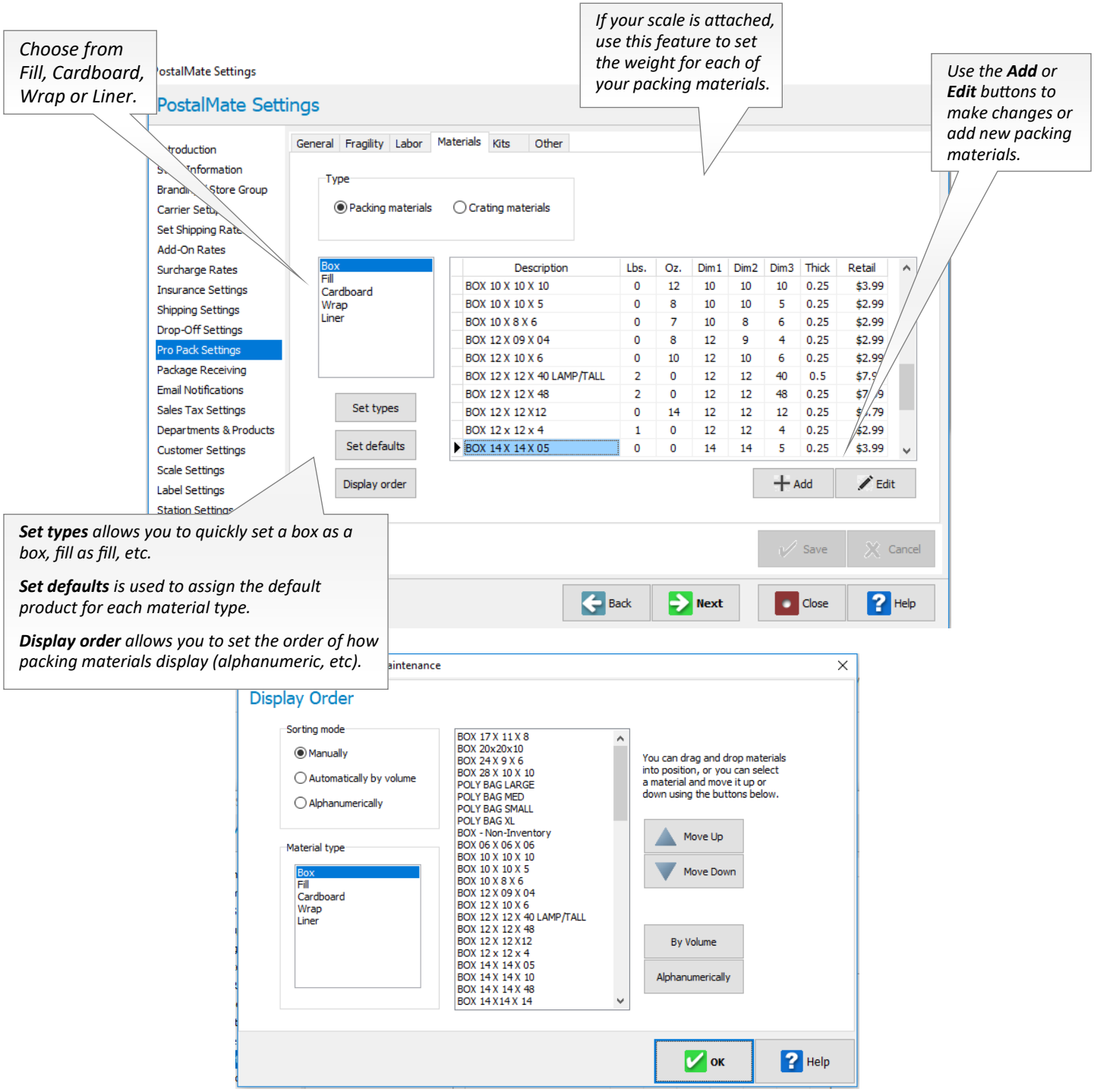
▶ Setup Pro Pack continued…

The Set Up Packing Materials screen allows you to easily add new or update existing packing materials.

- Each **Container** needs to include a weight, dimensions, thickness of the box and a retail charge in order to accurately estimate the pack job. The labor per box amount is optional as you can apply labor based on Fragility and Complexity.
- Each **Filler** needs to include a weight and a retail charge.



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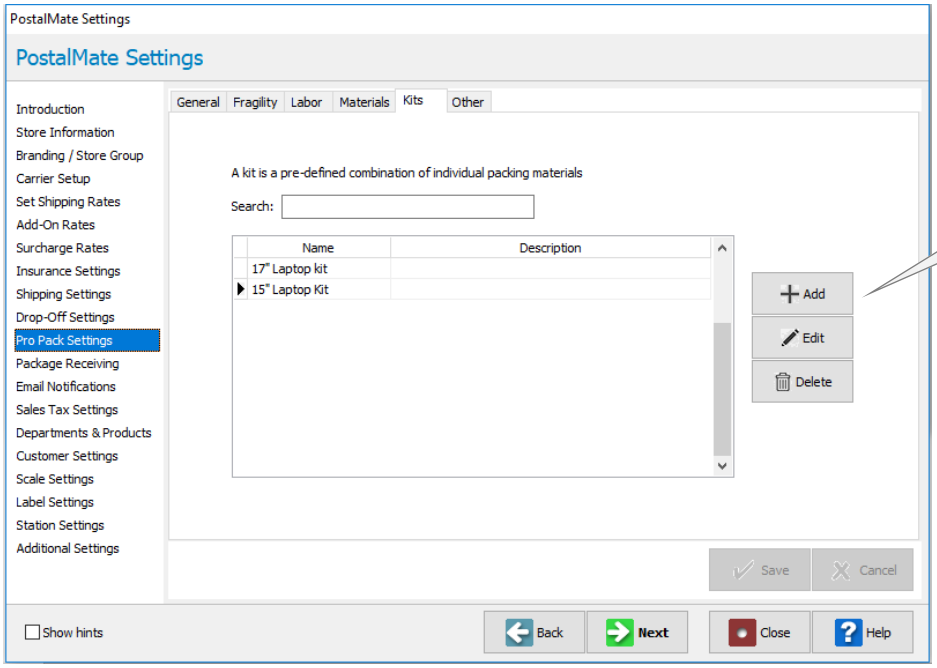
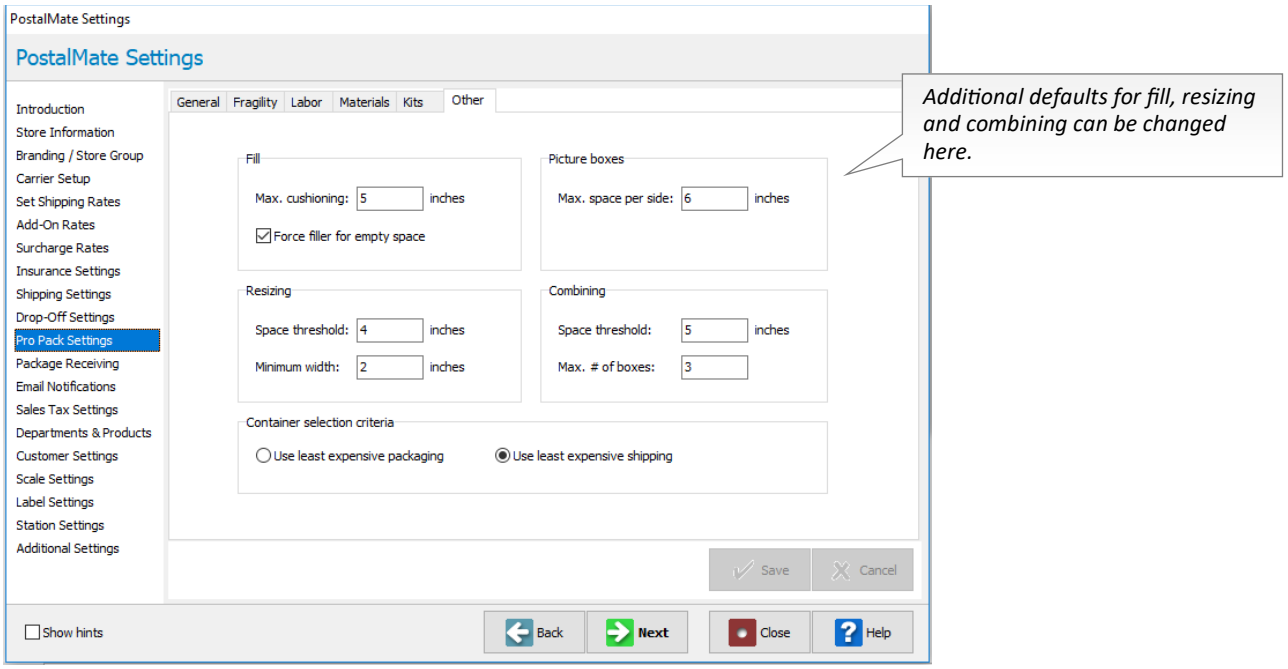
▶ Setup Pro Pack Continued…

Kits are groups of packing materials used to pack an item. Example: if you use the same box, foam and peanuts for each laptop you pack, you can create a kit of those items.





- See TechNote titled Setting up ProPack for more detailed setup information.

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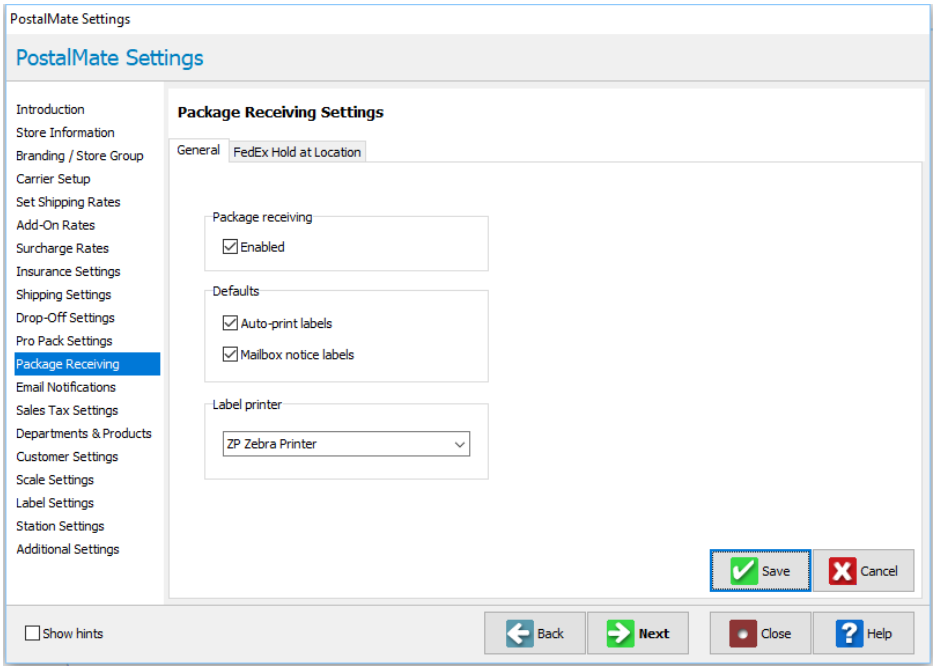
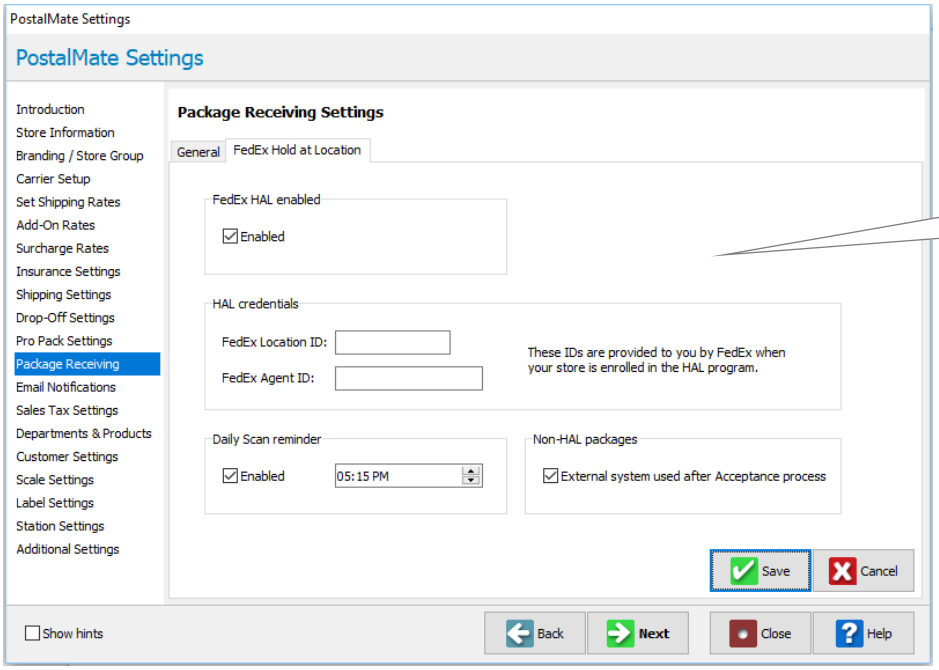
Package Receiving

Process, manage and keep records of incoming packages for mailbox holders and other customers.

You can log packages delivered to your store by any supported carrier, and then release them to the designated recipients. ID and mailbox notice labels can be printed for easy package identification and lookup. If you'd like to require signatures for package releases, Topaz signature devices (Standard Pads and LCD Pads) are supported.



See TechNote titled [Package Receiving] for more details.



If you are a FedEx Hold at Location (HAL), enable and enter your HAL credentials here.

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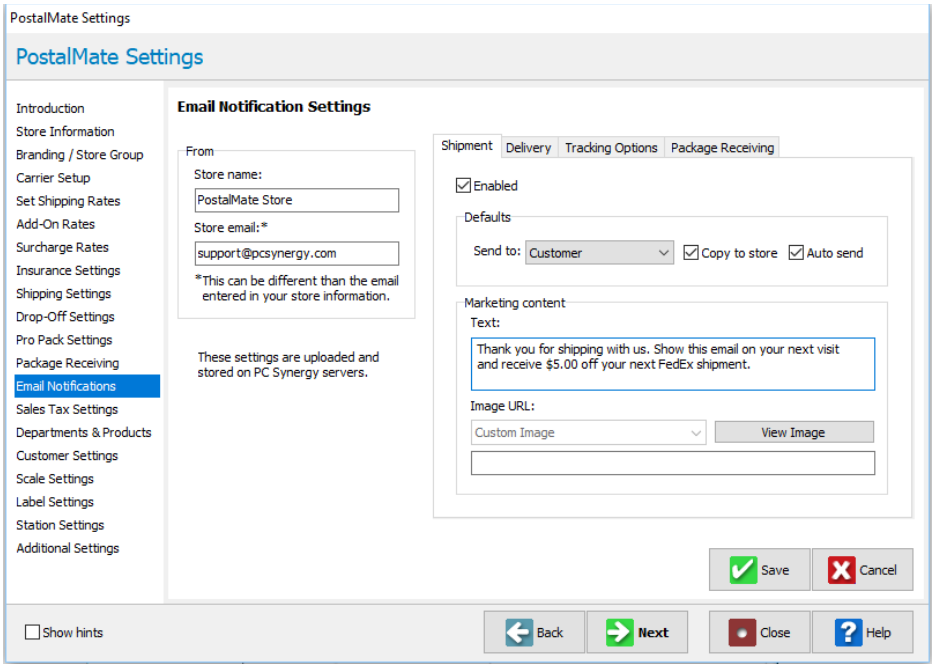
Email Notification Settings

Email notification allows you to send automatic emails to your customers and/or ship to's with package status information. You can include a marketing message in your email (html is ok!) as well as add your store logo to the email using an image URL.

1. **Shipment Notification**: This sends an email at the time of carrier pickup to let your customer (or Ship To) know that the package is on its way.
    - Check the box "Enabled". Select either Customer or Ship To as the default. Choose if you want to receive a copy of the email and if you want the emails to automatically send when an email is present. Include a marketing message.
2. **Delivery Notification:** This sends an email when the package is delivered (only available for shipments with full tracking).
    - Check the box "Enabled". Set the default to send to Customer. Choose if you wish to receive a copy of the email and if you want the emails to automatically send when an email is present. Your marketing content here may be different than in the shipment notification.
3. **Tracking Options:** You may have your website set up to allow your customers to track packages already. These additional tracking options allow the email notifications to direct back to your website rather than to the carrier's website.



See TechNote titled Setting Up Email Notification or Email Notification Tracking Options for detailed setup instructions.

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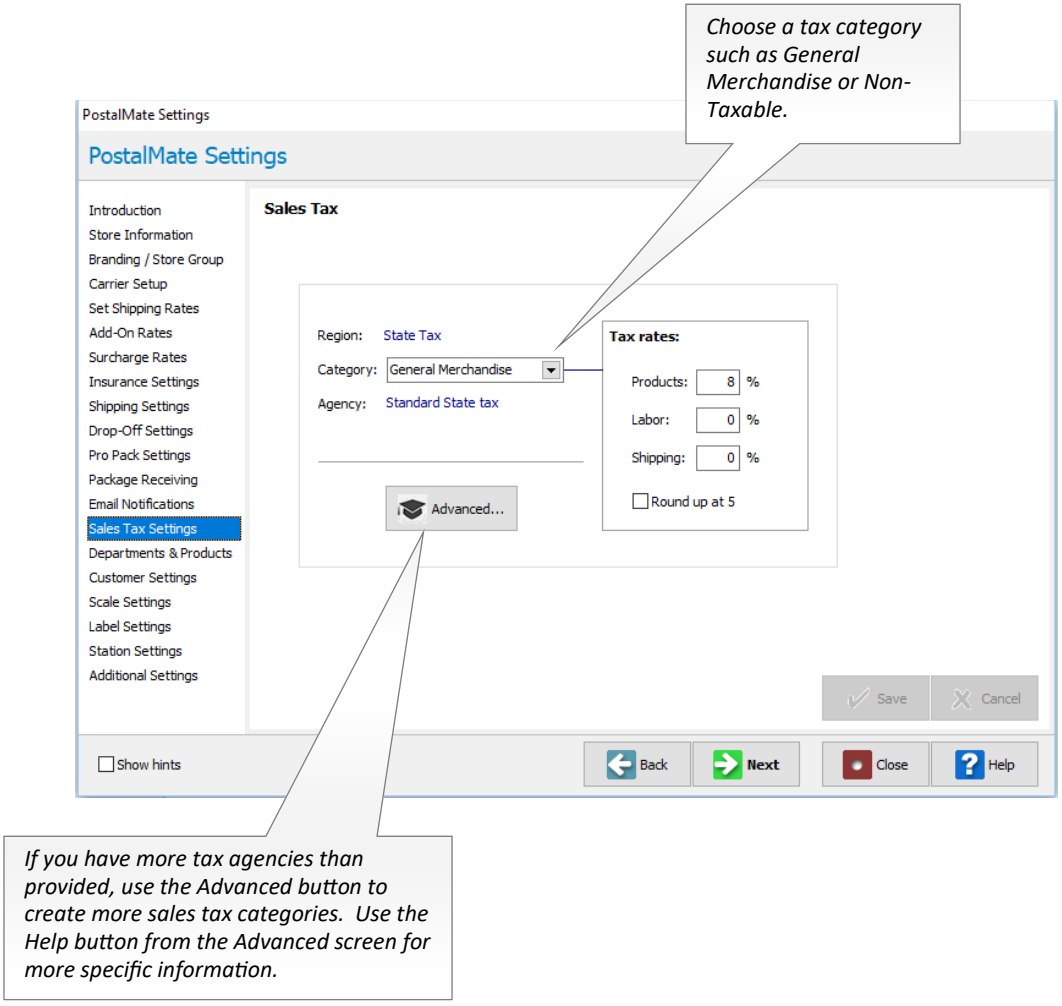
Set Sales Tax

Sales tax may be set here or in your CashMate register settings.

For each agency you pay tax to and for each product and/or service type you offer in your store, you need to enter the sales tax amount into PostalMate.

- Use the drop-down arrow next to Category to choose the tax category.
- Enter the tax amount for each item in the category. If tax does not apply, leave the default of "0".



If you are unsure as to which items sales tax applies, contact your accountant or local tax authority.

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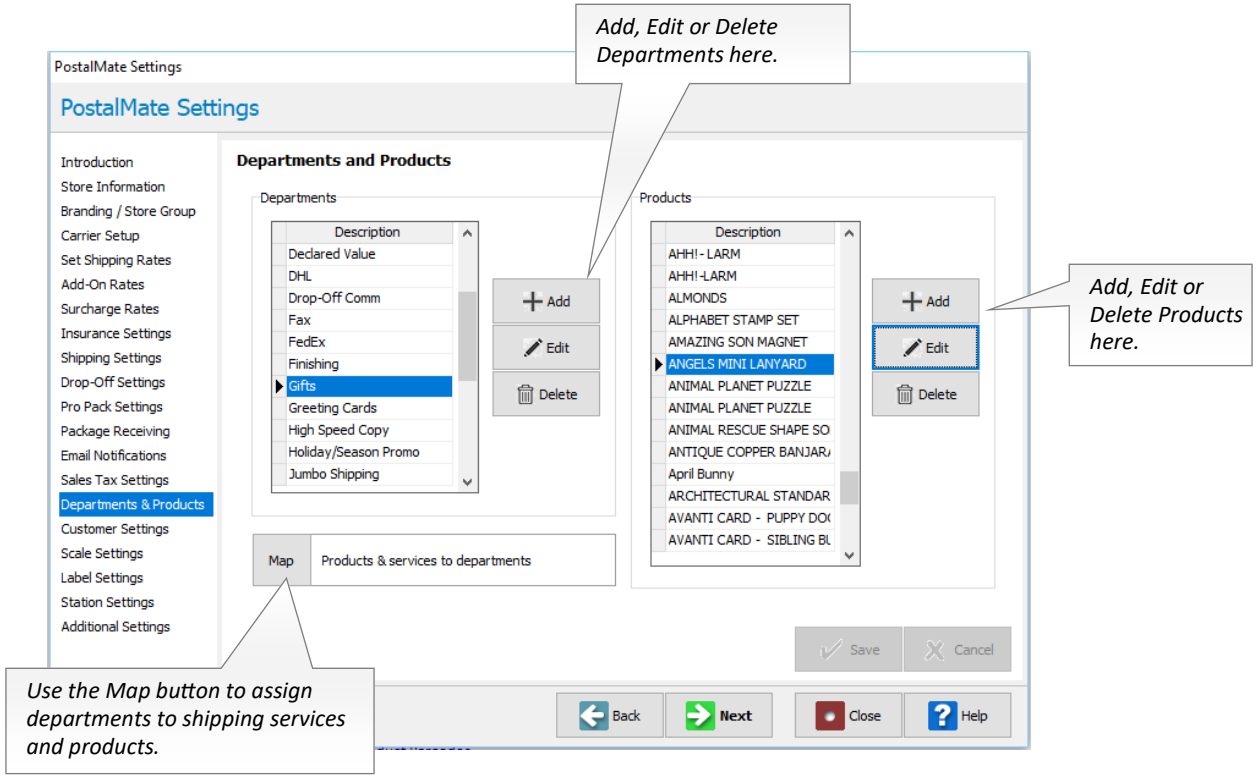
Setup Departments and Products

Departments and Products can easily be added or edited on this screen. Any changes made here will also be seen in the CashMate register.

- **Departments** are categories that PostalMate assigns revenue to based on your settings and products. Every product and service in your store is assigned to a department so that profit can be determined and revenue can be properly allocated.
- **Products** are items that fall under a specific department. If you only use PostalMate, products would typically be packing materials. If you plan to use the CashMate POS, products can be individually priced, assigned a SKU number, inventoried and tracked for sales either by product or by the department the product is mapped to. Additionally, you can create SKU numbers and print pricing labels.
- **Department Mapping**: In order for PostalMate to accurately categorize your revenue, each product and service needs to be mapped to a department.



For detailed setup information, see the following TechNotes:

- Adding Departments
- Adding Products
- Inventory Management
- Creating Product Barcodes

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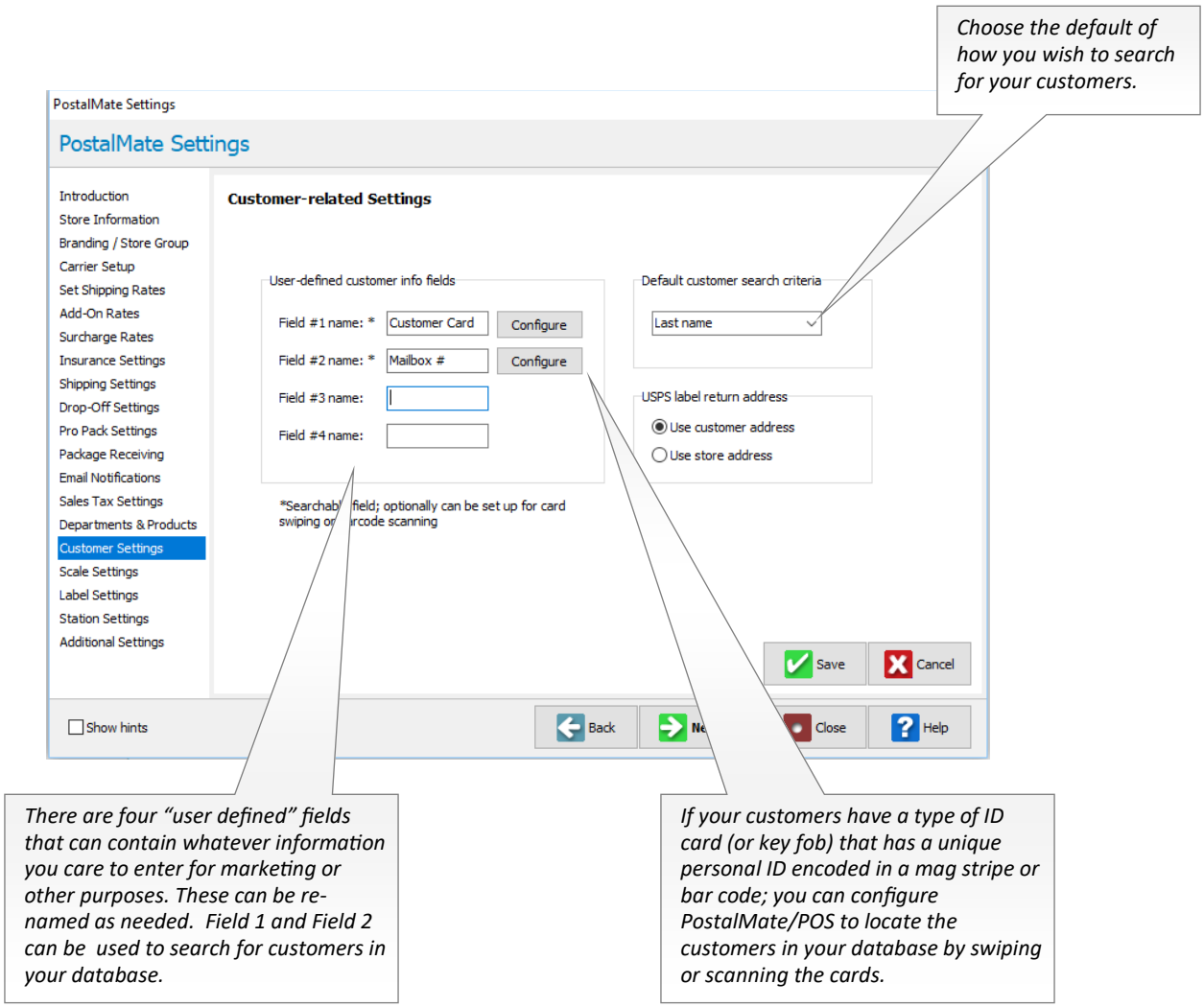
Customer Settings

User Defined fields: PostalMate provides areas in which additional information may be entered in order to classify your customers into groups or search for them by different search criteria.

Default customer search: when searching for a customer in the customer look up screens of PostalMate you may choose to default to Last name, Company, Phone number, Customer ID, or the first of your user defined fields.



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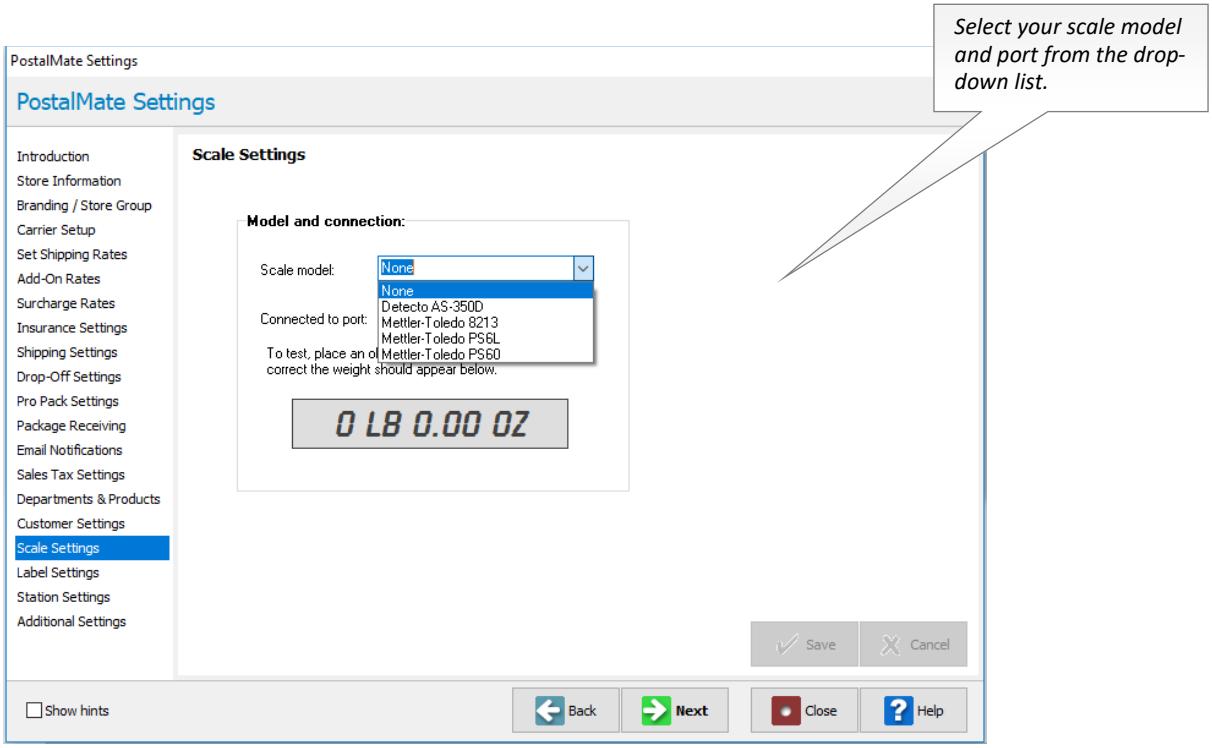
Setup Scale

PostalMate will read the weight from your scale and use that weight to calculate a rate for your shipment.

Once you have connected your scale to the system using a serial or USB connection, you will then need to tell PostalMate what kind of scale you are using and which port it is plugged into.

The list of compatible scales is in the drop-down box. Be sure to select the correct scale and port. If your model is not listed then it is not supported by PostalMate.



Once your scale is connected, you will be able to test it from this screen.

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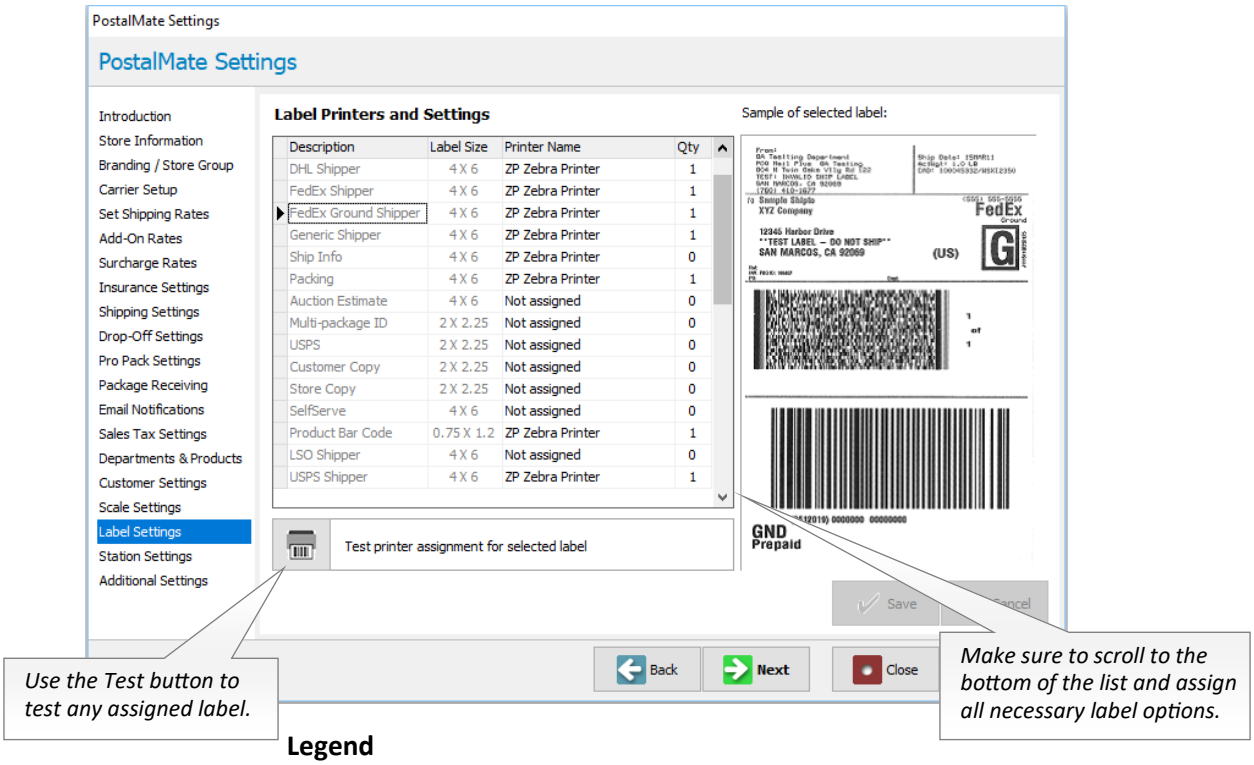
Setup Labels

To use a label printer in PostalMate, you must install the appropriate Zebra driver or Seagull driver for your printer to print most types of internet shipping labels.

Once your driver is installed:

- Select the first label you would like to assign to a printer. Click the box in the "Printer Name" column and select the correct printer from the drop-down list.
- Repeat the printer selection process for each label you would like to have printed when you are shipping a package.



Legend

- **Shipping labels:** DHL Shipper, FedEx Shipper, FedEx Ground Shipper, LSO Shipper, USPS Shipper (used with Endicia interface), USPS Shipper w/ Customs (assign to your 8.5x11 report printer), Dry Ice, UPS Shipper, and UPS Pickup.
- **Optional labels**: Generic Shipper (used for non-internet shipments), Ship Info, Packing (for use with Pro Pack), and Product Bar Code (prints to a 4x6 printer that accommodates .75x1.2 label size for barcode labels).
- **Uncommon labels:** All 2x2.25 labels are for use with a 2x2 label printer.
- All other reports and customs forms print to your Windows default report printer.

See Hardware Requirements for a list of supported printers.
See TechNote titled Label Printer Setup for more detailed information.

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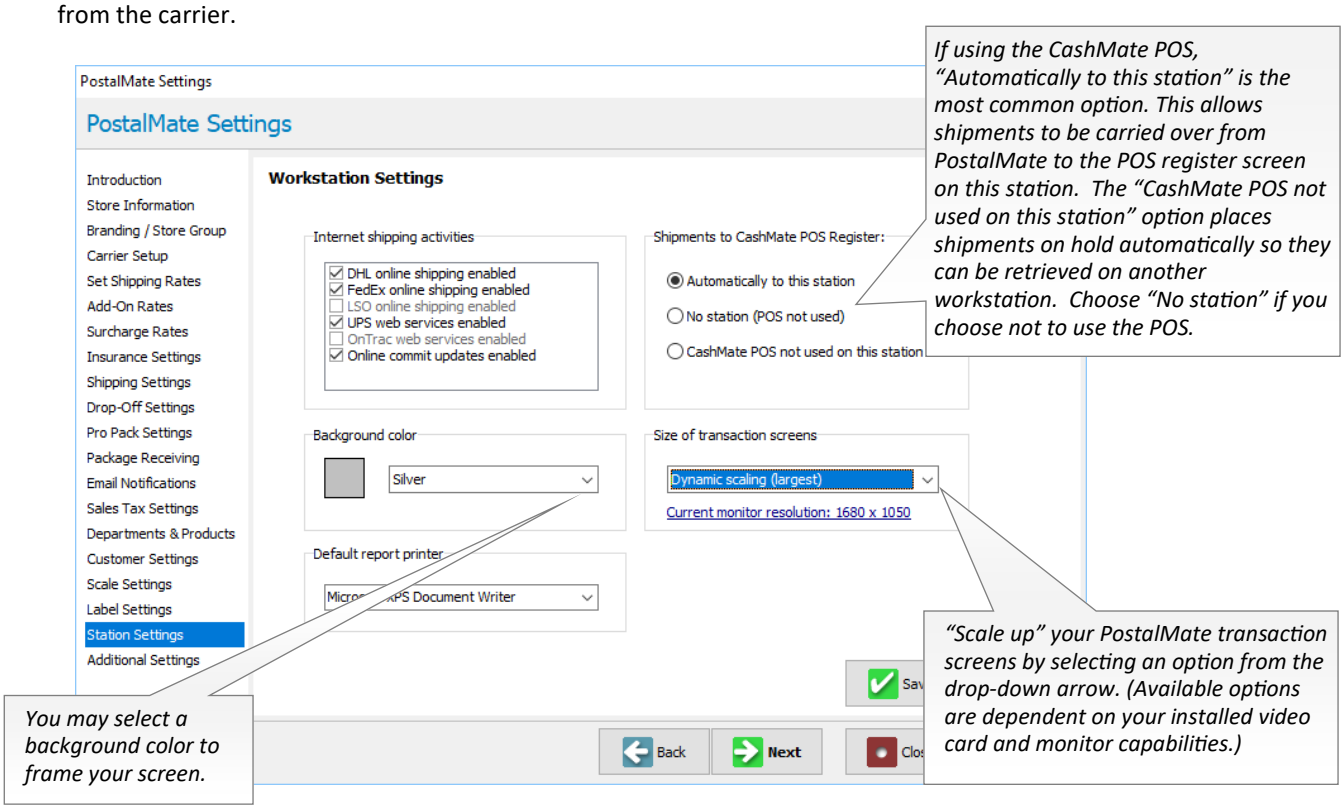
▶ Station Settings

These are settings for each individual workstation. This is one of the few settings that must be set on each workstation in your network.

Internet shipping activities:

- Once set up for DHL, FedEx, UPS, or LSO internet shipping, the boxes for "...online shipping enabled" will automatically be checked. When setting up an auxiliary station, you will need to visit this screen and turn on the appropriate services for your store. Unless there is an unusual circumstance, like a server outage, there are no typical reasons that these options should be disabled.
- Online commit updates enabled allows you to get carrier commitment information directly from the carrier.



PostalMate Sidebar

If you use wide-screen monitors, along with scaling you can also take advantage of the PostalMate Sidebar. The Sidebar is a dockable window that contains one or more useful "gadgets" that you can choose from. The Sidebar is designed to occupy the extra space available on widescreen monitors and/or appear on a separate customer facing monitor "Twinview". Using Twinview allows you to display marketing or other graphics to your customer. Then, when you begin a shipment or a sale, the PostalMate or POS transaction screens will display. See TechNote titled PostalMate Sidebar for more details.

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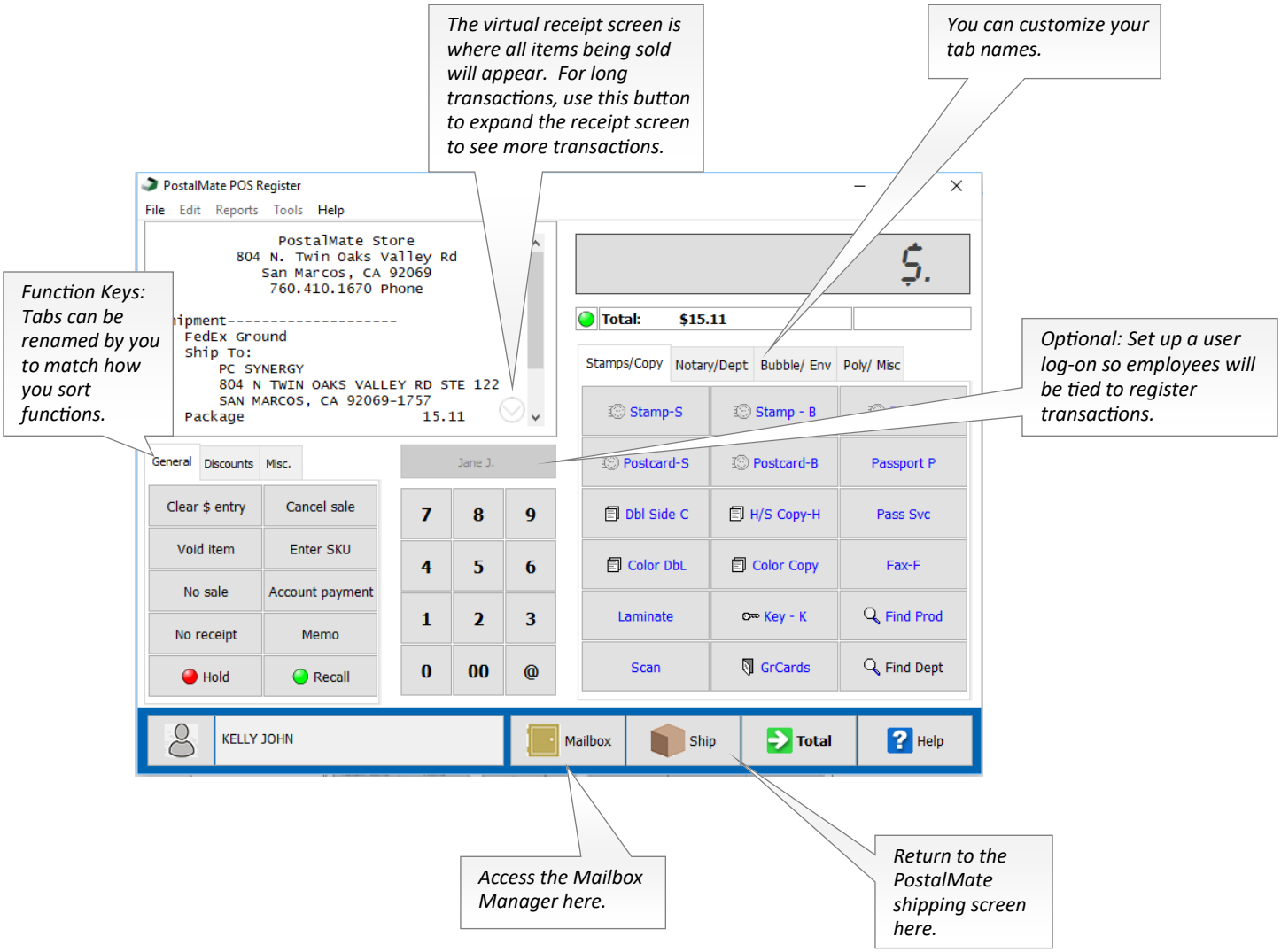
CashMate POS

Clicking the cash register button in PostalMate will open the CashMate register screen. If you have processed a shipment, the information will be ready and waiting on the virtual receipt screen. *Note: clicking the register button from the Windows task bar will not bring your shipment to your register screen. Always use the cash register button in PostalMate.*



Note: PostalMate will prompt you to open your register day to perform transactions. To open the register day manually, choose ***Tools > Open Register Day.*** *The register day should be opened prior to processing any packages in PostalMate.*

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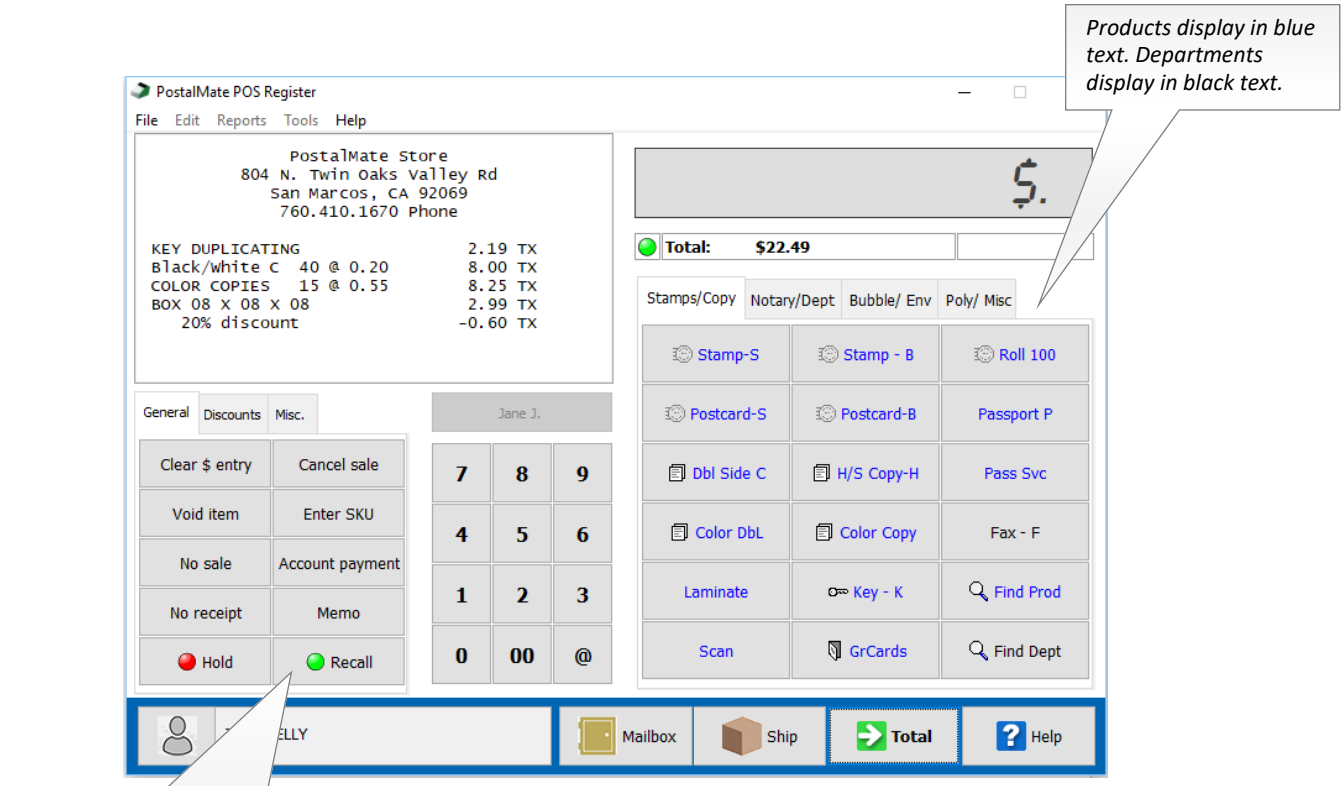
Sell a Product or sell from a Department

It's easy to add a product or department to this transaction.

- Products are buttons with blue text, departments display in black text. Click on the button and the item will appear on the virtual receipt.
- To sell more than one of a given product, enter the quantity, use the @ or * and then click the product button. The number and the quantity will appear on the virtual receipt.
- To sell the item at a price other than default, enter the price and then click the button.
- Use the "Find Prod" or "Find Dept" button to locate an item that does not have a register button.
- If you have entered the product with the SKU number—use your barcode scanner to scan the product and it will display on the virtual receipt. Optionally, you can use the SKU button and type in the SKU number.



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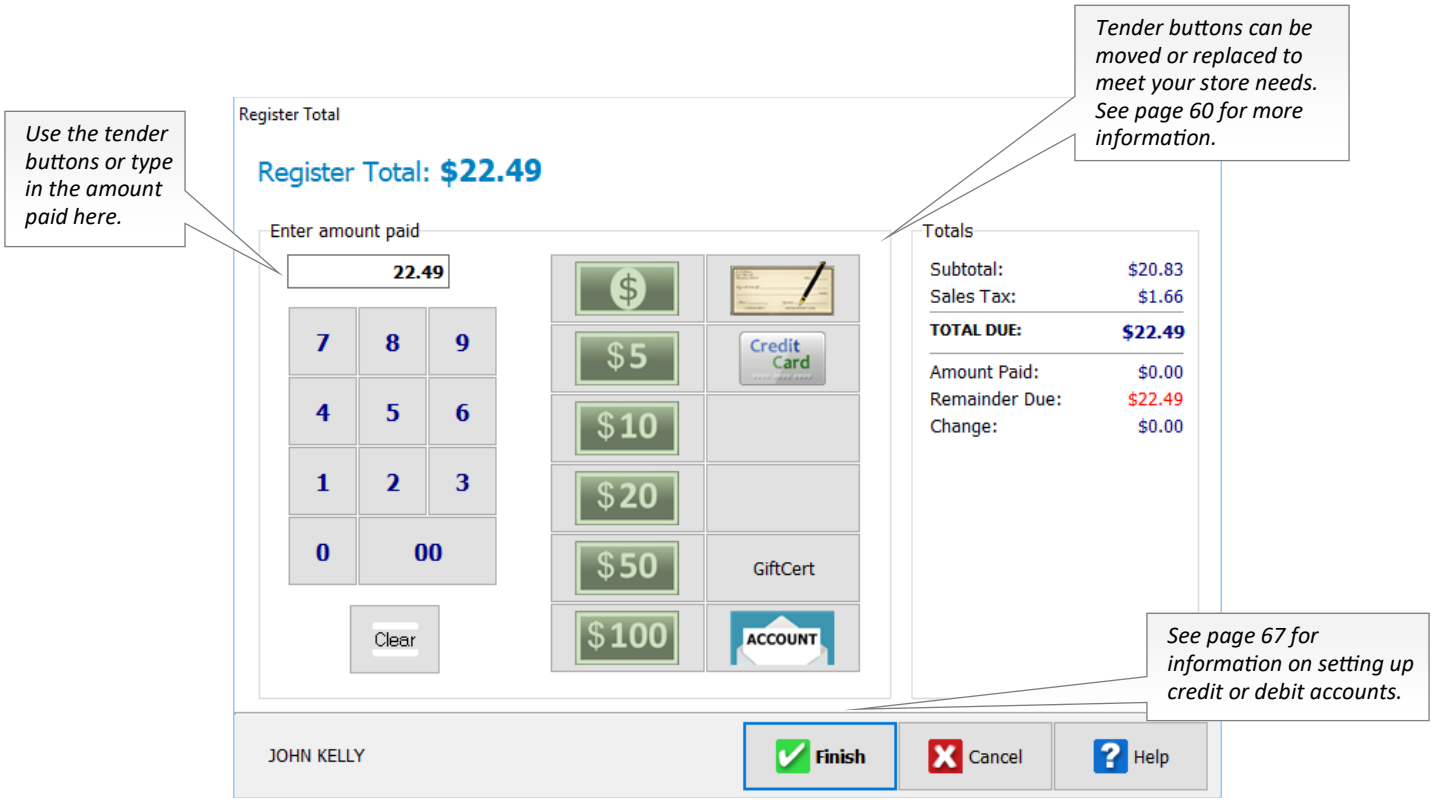
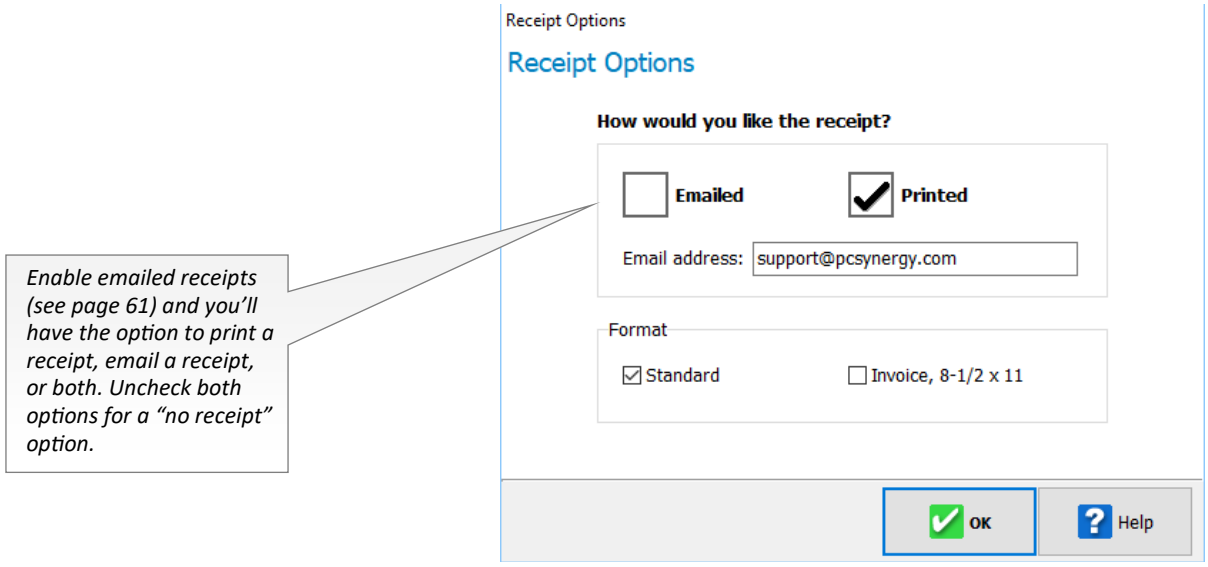
Register Total

When you are ready to finalize the transaction, choose the "Total" button.

- Select a tender type, or use multiple tender types by entering the dollar amount before selecting the payment method.
- Simply click "Finish" to complete the transaction. (Choosing Finish without selecting a tender type will complete the sale as a cash transaction.)





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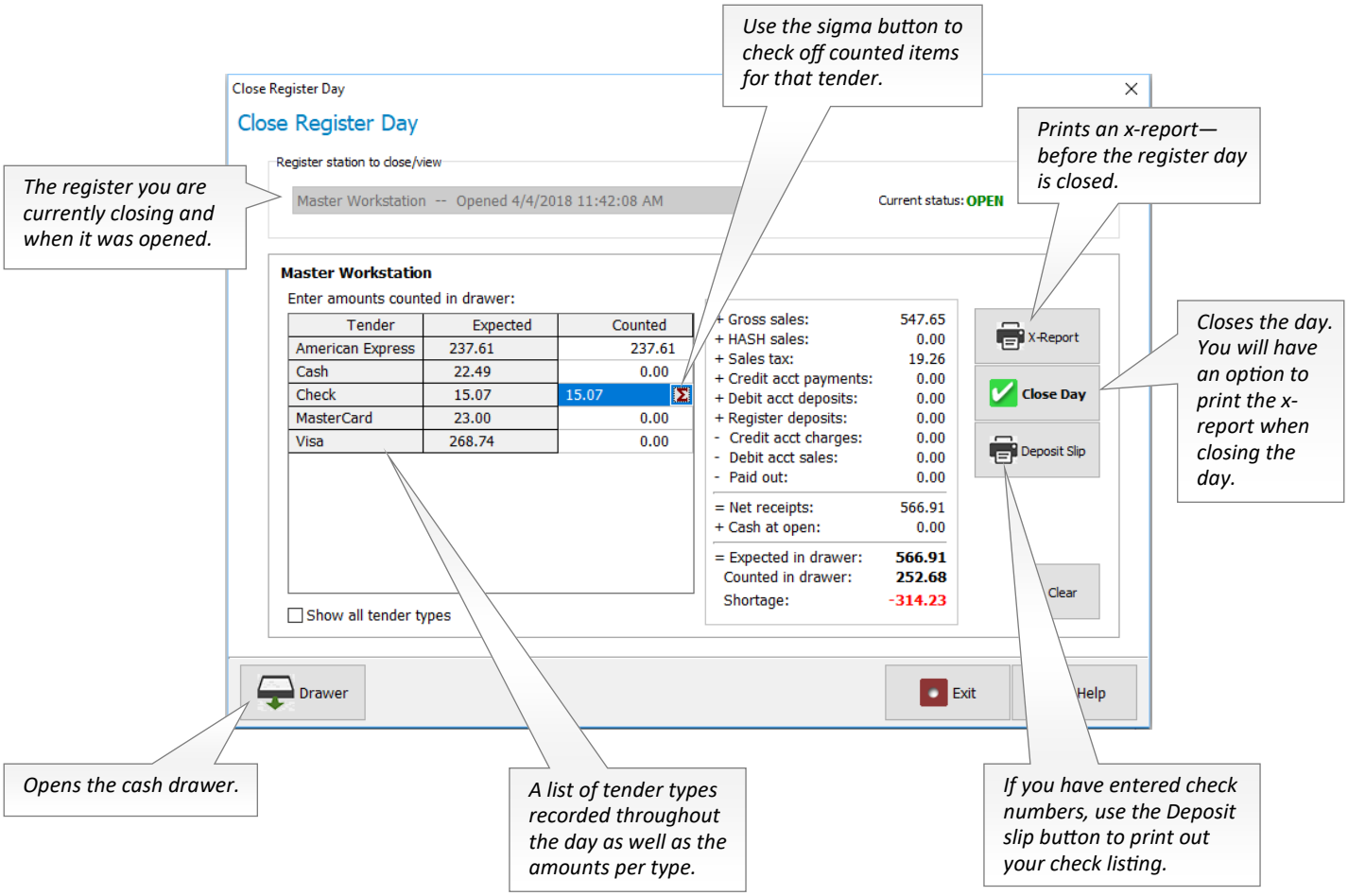
Closing the register day

For accurate accounting of your sales, profits, inventory and other store statistics, it is important to close your register day each and every day. You should do this before you leave your store so that register reports accurately depict the difference between a calendar and a register day.

To close your register day, choose **File > Close Register day**.



If PostalMate is networked, you must close the register day on each auxiliary station before closing the master station. When needed, the Register Day for any auxiliary station can be closed on the master station. In the Close Register Day screen, select the auxiliary register from the drop-down list under “Register station to close/view”.

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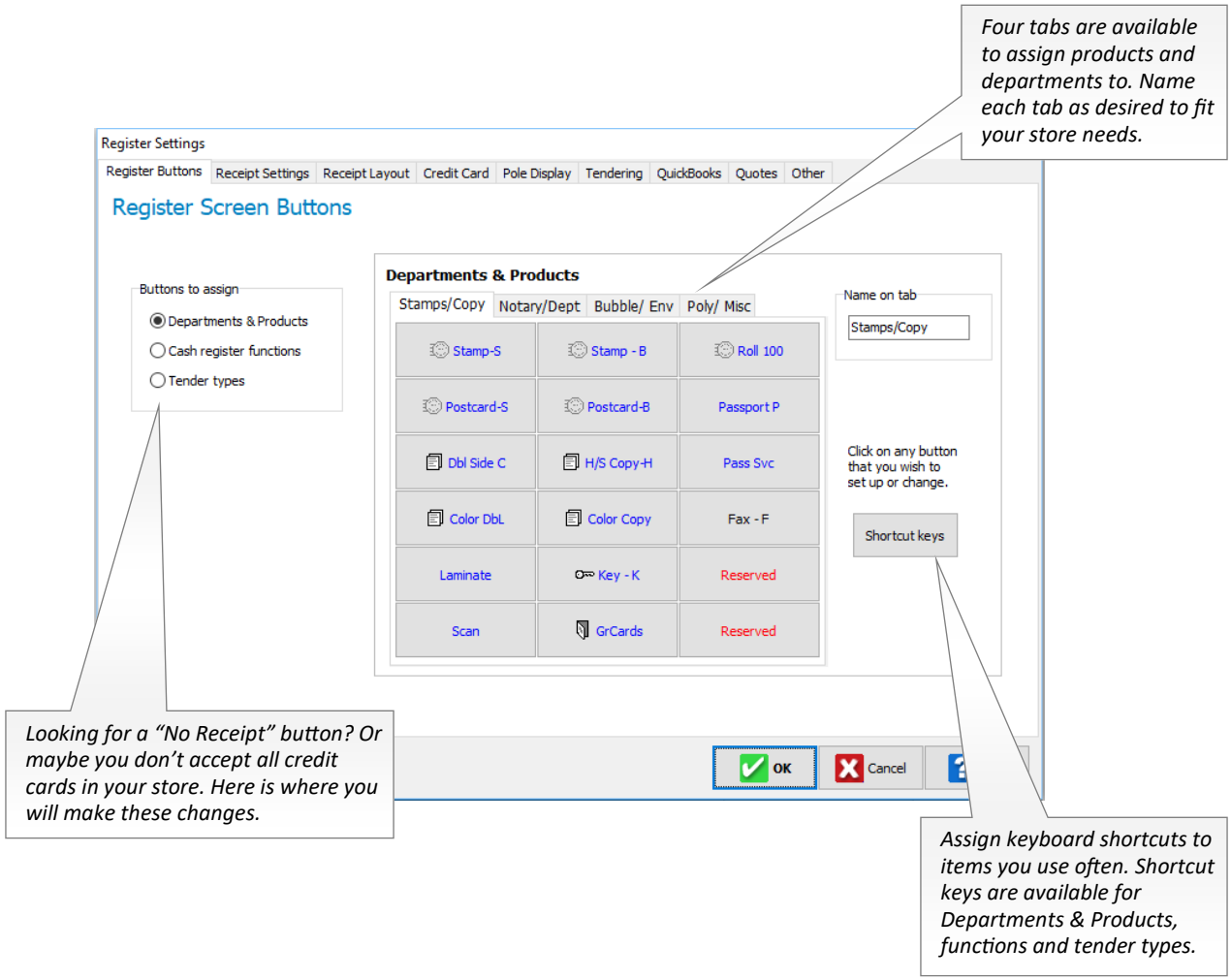
Setting up the POS Register is easy. From the POS main screen, choose **Tools > Options > Register Settings**.

▶ Setup Register Buttons

Register buttons may be set up for departments and products that you sell often. You may need to edit the product or department you want to set up as a button and ensure a "Button" name has been entered.

- Click the button you wish to assign. If you wish to replace a button, clicking on the occupied button will do this.
- From the list, choose the department or product for your button.
- Click "OK" and the button will be assigned.
- Repeat this process until you have completed assignments for departments, products, functions and tender types.



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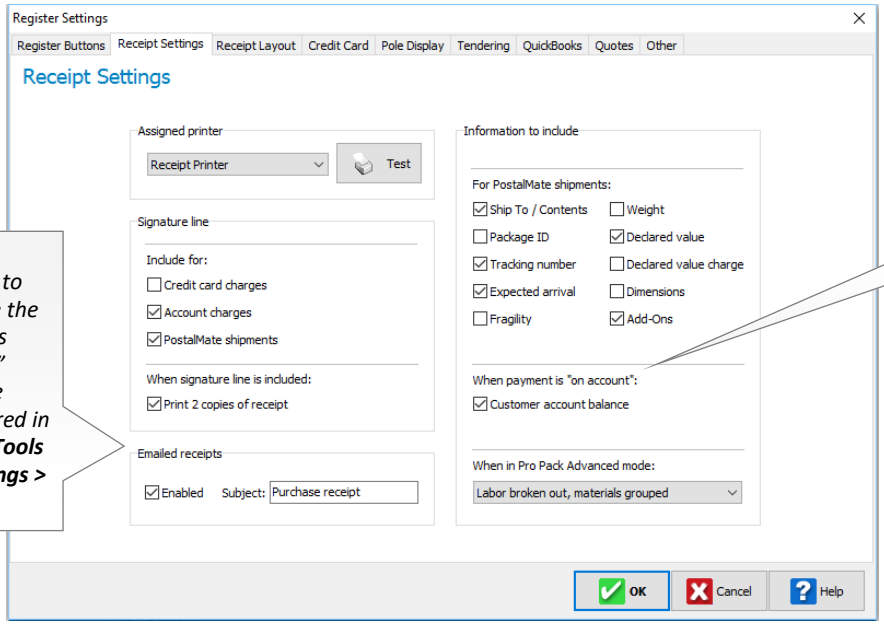
Setup Receipt Printer

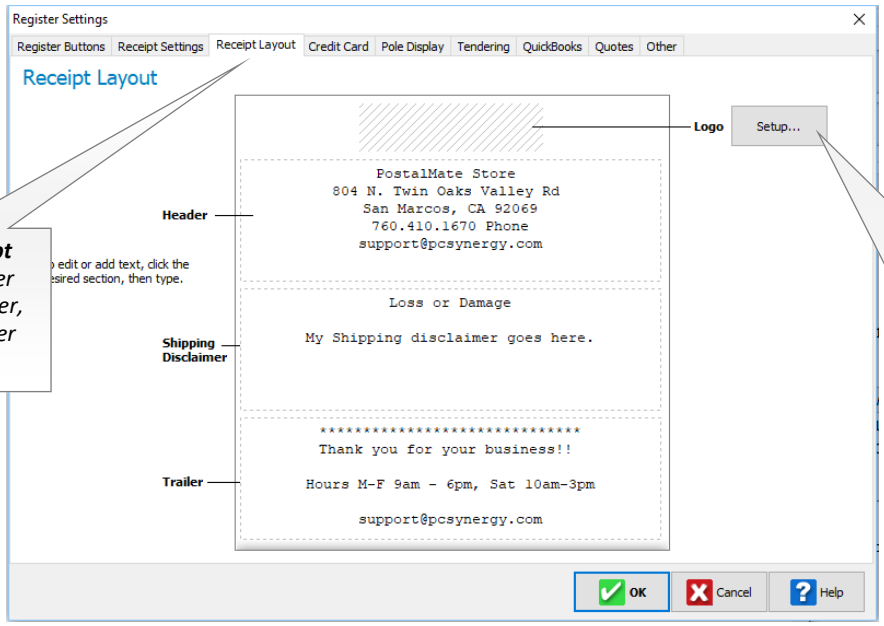
Your receipt printer driver must be installed in Windows in order to select the printer here. Either install the specific driver for your printer model, or a generic/text driver named "Receipt Printer" will work. See TechNote titled Installing your Receipt Printer for more detailed info.

- Assign the printer and test the receipt.
- What information do you want on your receipt? Check off the boxes to choose the information you want your customer to go home with.
- Signature lines: You may choose to print a signature line on your receipt for certain kinds of transactions.



Emailed receipts: *Checkmark the box to enable, and change the email subject line as desired. The "From" email address is the email address entered in PostalMate under* ***Tools > PostalMate Settings > Store Info****.*

If using house accounts (credit or debit are options), you may choose to have the credit balance print out on the receipt.



Choose the ***Receipt Layout*** *tab to enter your receipt Header, Shipping Disclaimer and Trailer.*

Printed Receipts: *If your receipt printer supports printing graphics, here is where you can setup the logo to print on your receipt. See TechNote titled Adding a Logo to your Receipt for more details.*

Emailed Receipts*: You can point to .jpg or .png file to include your store logo on an emailed receipt.*

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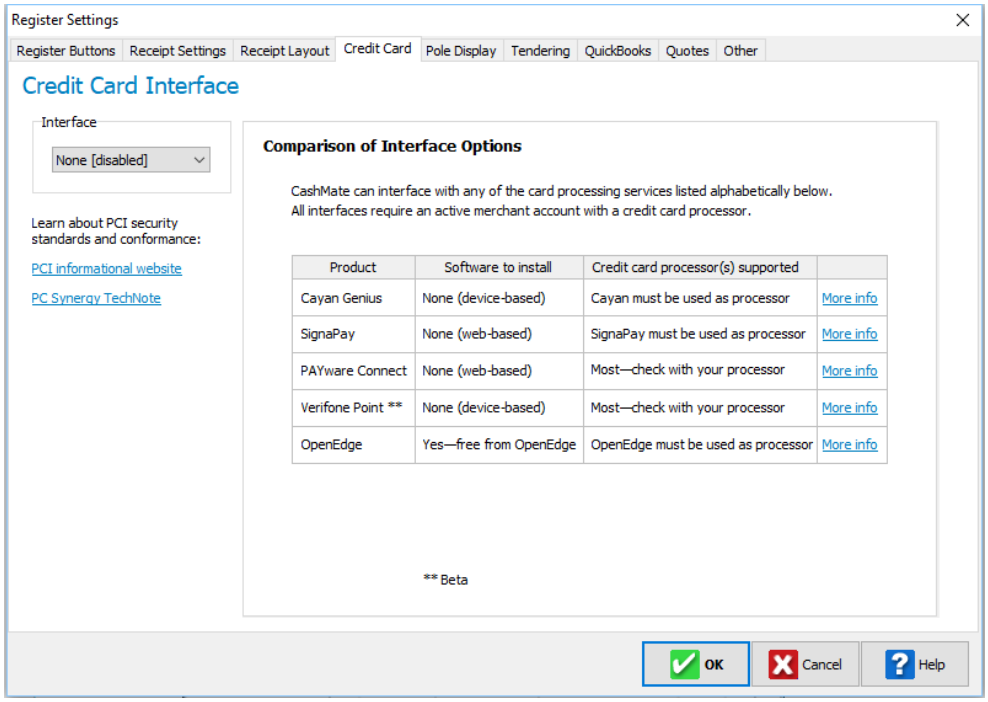
Setup Credit Card Interface (Optional)

This feature allows credit/debit card transaction processing. You must obtain the appropriate software from your processor or other party that sells or distributes the required software. You must have an active merchant account with a credit card processor.

PostalMate's POS supports the following credit card interfaces:

- PAYware Connect is a Verifone product and most processors are supported; contact your processor to verify. PAYware Connect is a web-based subscription service, and no Verifone software or support contract is required. See TechNote titled PAYware Connect Setup for more information.
- Cayan Genius: The Genius® Customer Engagement Platform® by Cayan™ is a payment solution that meets the critical industry mandates and standards effective October, 2015. It also delivers other great benefits: Credit, integrated PIN Debit, digital signature capture, mobile payments such as Apple Pay and Google Wallet and EMV (EuroPay, Mastercard, and Visa). See TechNote titled Cayan Genius Payment Card Setup for detailed setup information.
- OpenEdge has free software that must be installed. Not all processors are supported, so you will need to contact Open Edge directly for more information. See TechNote titled Setting Up OpenEdge for detailed setup information.
- SignaPay is a credit card processor and can be interfaced in PostalMate without additional software installation. See TechNote titled Setting Up SignaPay for detailed setup information.



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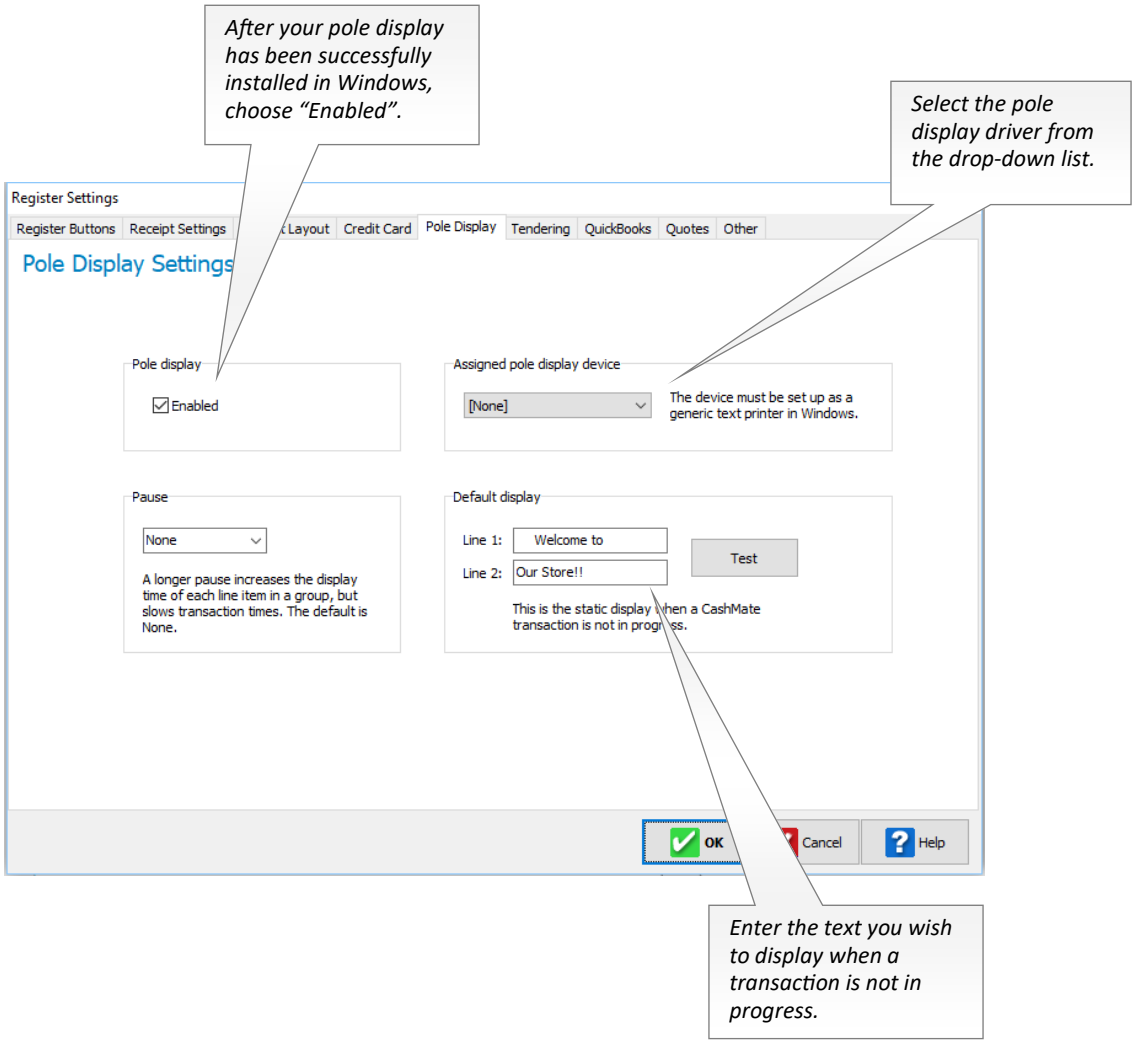
▶ Setup Pole Display (Optional)

A pole display offers the ability to display certain information to your customer. This display is required in some states. If you have a pole display, you will install a Windows generic/text only driver and assign it on this screen.



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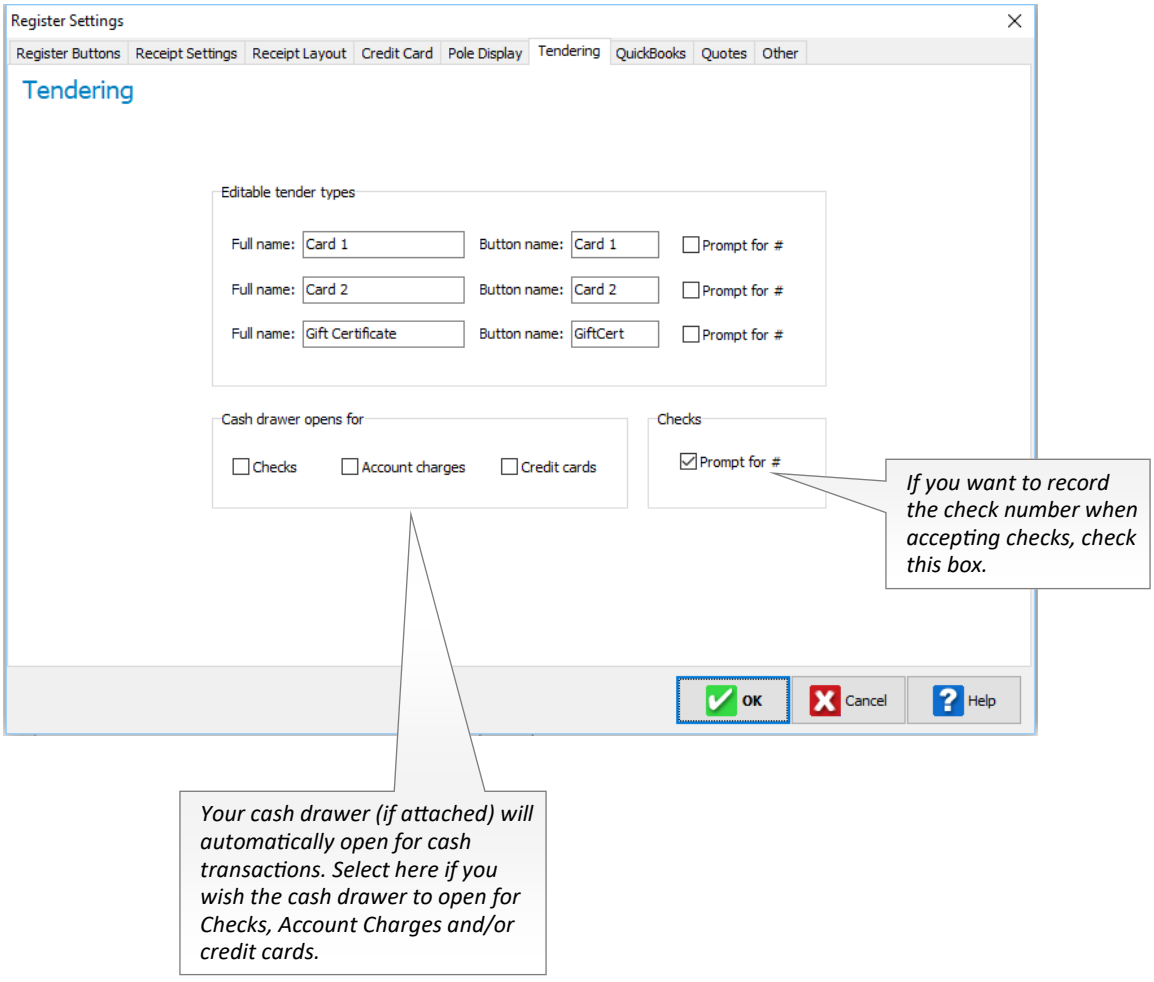
▶ Setup Tendering Options

The CashMate register has three tender types that can be defined by you. Here you can re-name the tender types to suit your store needs. Once named, you'll need to assign the new tender option on the Register Buttons tab.



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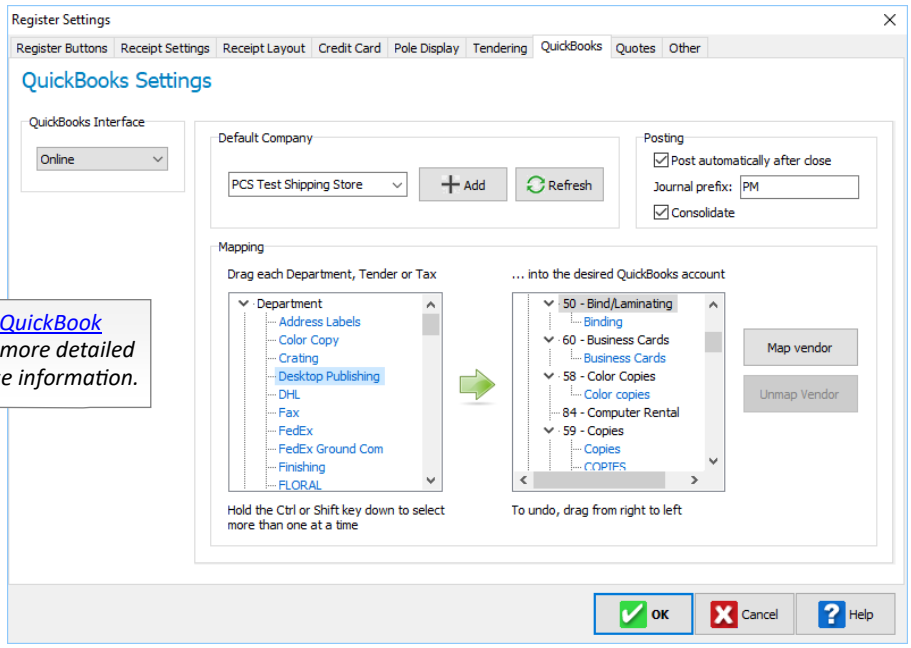
▶ Setup QuickBooks Online

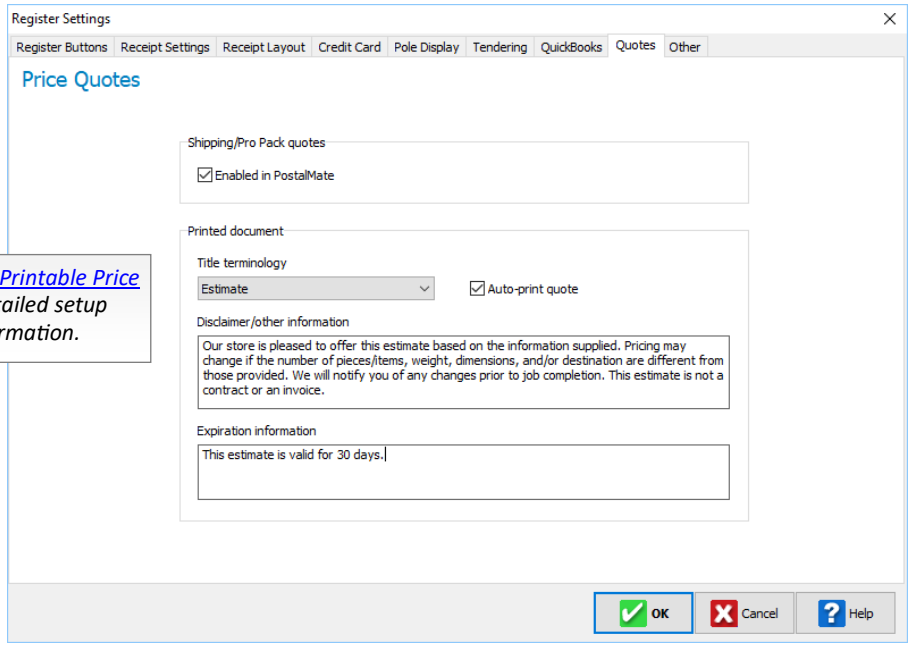
The QuickBooks Online interface is optional, and allows you to seamlessly import register day totals into QuickBooks Online each day.



See TechNote titled QuickBook Online Interface for more detailed setup and how to use information.

▶ Setup Price Quotes

PostalMate includes a robust Quote/Estimate feature which allows you to create price quotes, which can be recalled and processed at a later time. You can quote shipments (including freight shipments), Pro Pack jobs, and any combination of products or services in the CashMate POS register.



See TechNote titled Printable Price Quotes for more detailed setup and how to use information.

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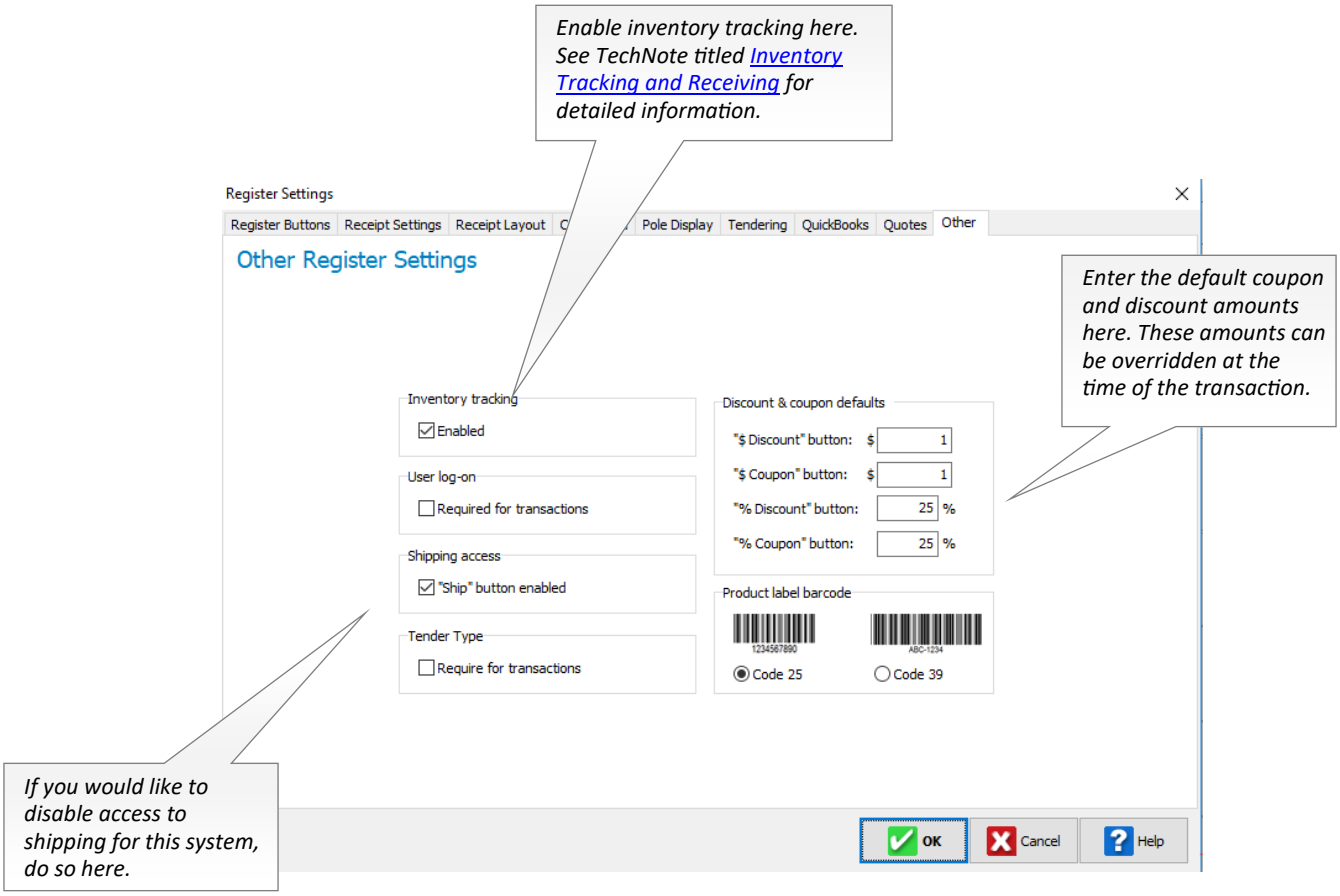
▶ Setup Other CashMate Options

The "Other" tab is where you can turn on inventory tracking and set default amounts for any discounts and coupons. The register functions in PostalMate allow for both discount and coupon buttons that can be used with any amount. You simply choose the line item you wish to discount, click the appropriate discount function key to apply the discount or coupon.



For more POS discounting options, go to **Tools > Options > Discounts and Special Pricing**. See TechNote titled Discounts and Special Pricing for more details.

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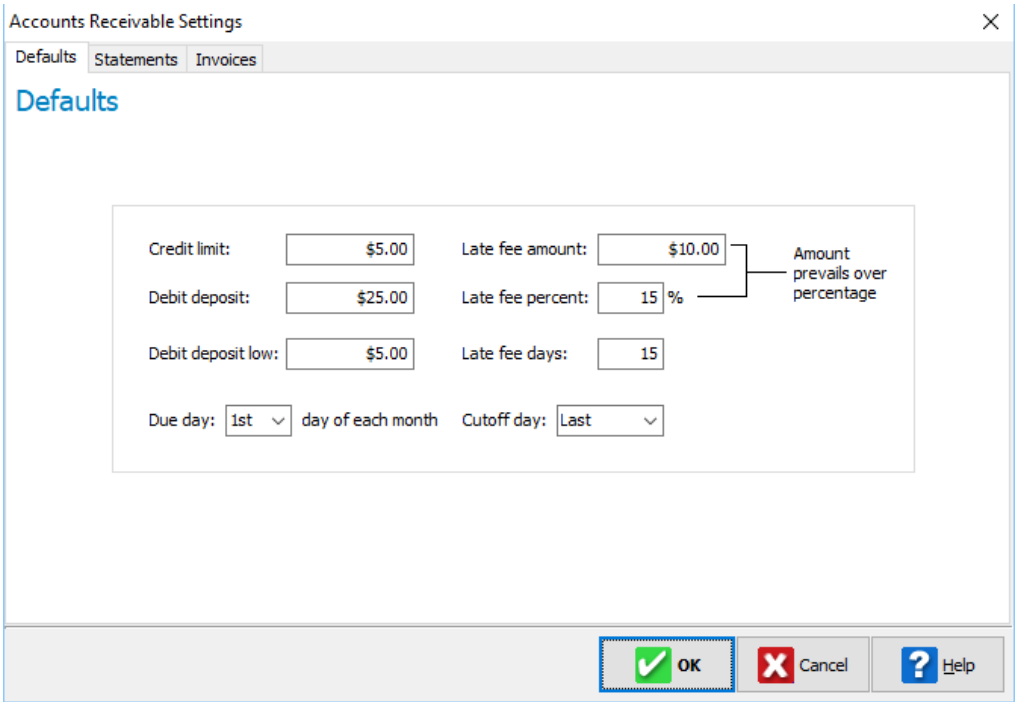
Accounts Receivable

Your account receivable settings are found in **Tools > Options > Accounts Receivable Settings**.

If you plan to create in-house debit and credit accounts for your customers, you'll need to fill this information in.

- **Credit limit:** This is the limit you will allow customers to charge. This can be overridden.
- **Debit deposit:** If you are opening a debit account, this is the amount you typically would take as a deposit.
- **Debit deposit low:** When do you want to be reminded that the deposit amount on a debit account is running low?
- **Late fee amount/percent:** Will you charge a late fee or a percentage of the balance?
- **Late fee days:** How many days past the due date will you wait before charging the late fee amount/percent?
- **Due Day:** What day of the month do you want balances due?
- **Cutoff day**: Choose which day you wish to be the last day of the billing period.



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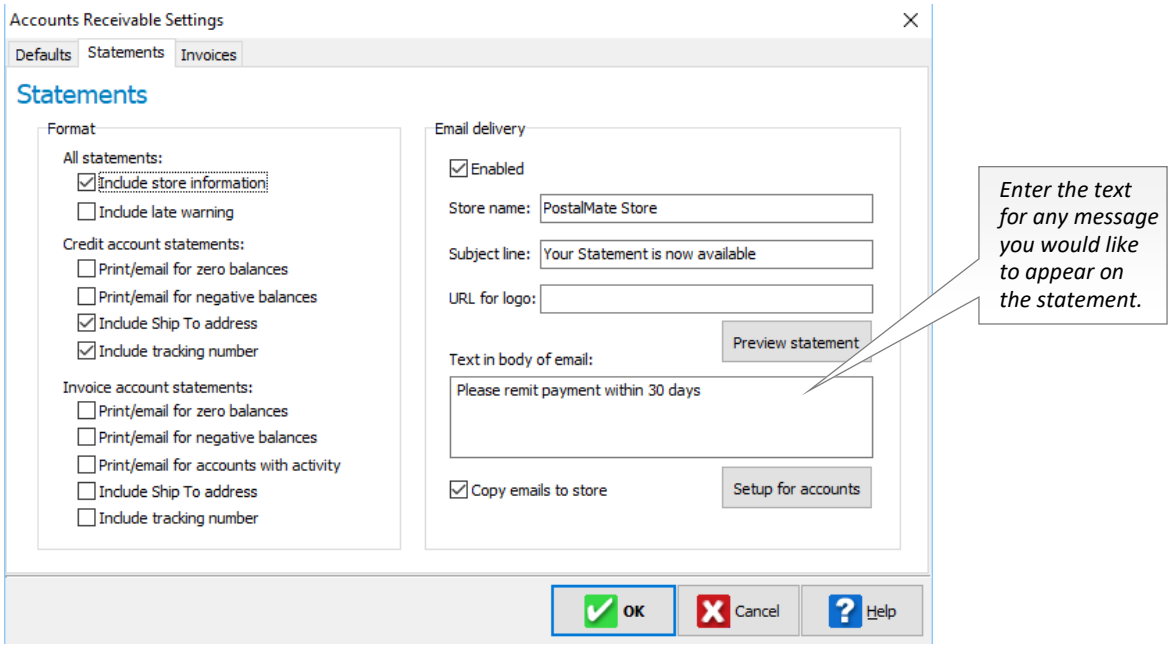
▶ Accounts Receivable continued…

Use the Statements tab to set up your billing statements for in-house charge accounts.

- Enter the text for any message you would like to appear on the statement and choose other settings for your statement.
- Select the options for what to include and when to print/email.
- Enable Email delivery and fill in the email information, if you wish to email statements.
- Choose “Setup for Accounts” and select which existing customers will get statements delivered by email and/or print delivery methods. (This can also be selected when adding a customer on the “Accounts” tab.)



Credit statements are created for all customers under **Tools > Statements > Create New…** Remember to only choose the Create New option once. Use **Tools > Statements > Print/Send…** to view, re-print or re-send statements from the current billing period. When creating mass credit account statements this way, a copy is automatically saved in Documents > PostalMateAutoSaveAccountStatements.

See the following TechNotes for more detailed information:

Credit Accounts

Debit Accounts

Invoice Accounts

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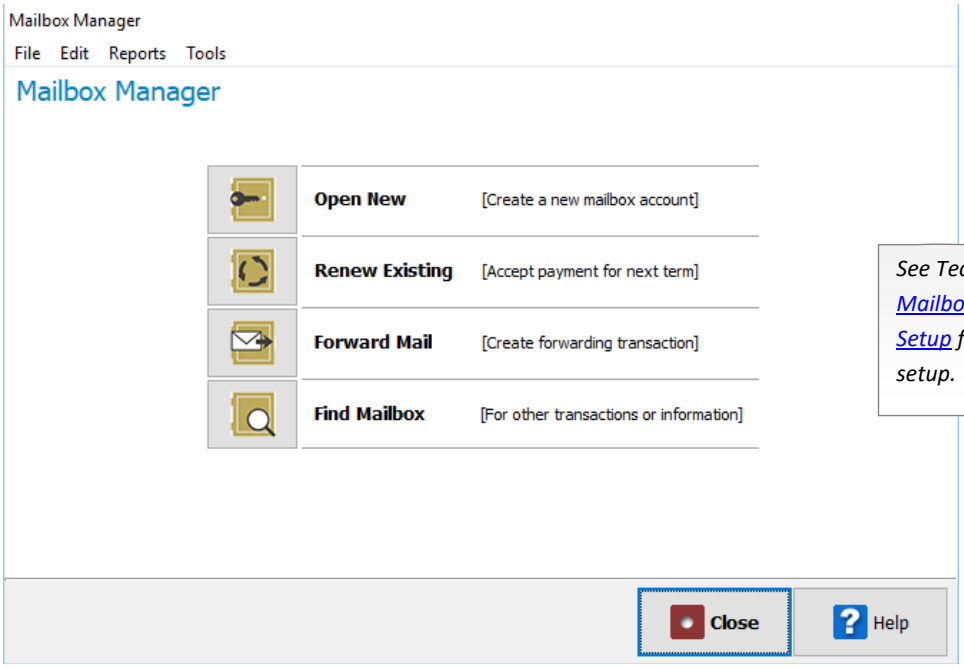
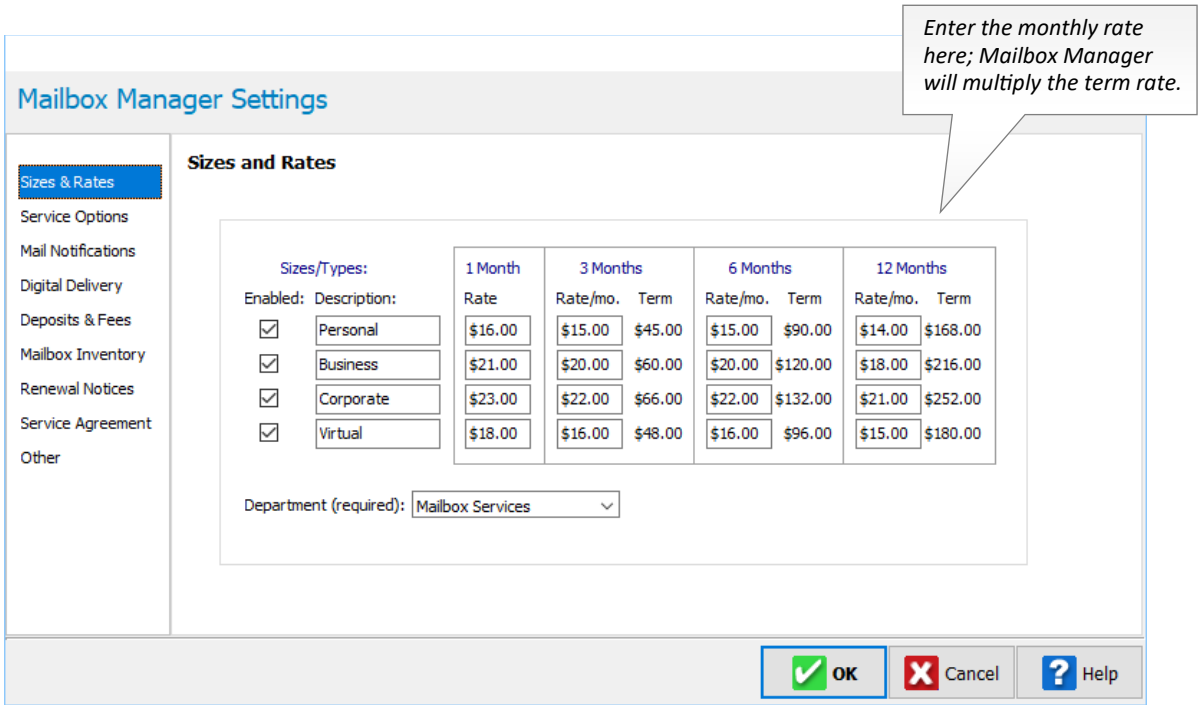
▶ Setup Mailbox Manager

PostalMate has a full featured mailbox management program which is accessible from the POS register screen. Look for the "Mailbox" button at the bottom of the screen. (If you do not see the button, choose **Tools > Options > Enable Mailbox Manager**.)



See TechNote titled Mailbox Manager Setup for detailed setup.

From Mailbox Manager, choose **Tools > Settings**.



Enter the monthly rate here; Mailbox Manager will multiply the term rate.

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Setup Mailbox Manager continued…

Beginning with the first tab, fill in all of the information. Options are described here:

Sizes and Rates

- Enter the names of the sizes of boxes you offer in your store such as small, medium, large or personal, business, and corporate.
- Enter the rate for each term based on the month. For example, for a quarterly box, divide your quarterly rate by three and enter the monthly rate.
- Assign a department. Without a department assigned, not only will the POS not know where to assign the revenue, but you will not be able to continue past this screen.

Service Options

- You may add any options you offer in your store such as 24 hour access or additional mail names. Enter the name and the charge per month. Don't forget to assign a department.

Deposits and Fees

- Enter the amount you charge for various fees and deposits.
- Enter the amount you will be taking should you begin forwarding mail for a box holder.

Mailboxes

- Add your current inventory of boxes here.
- Click "Add" and enter the beginning and ending number of each bank.

Package Notifications

Set up for PostalMate, SmartAlert or PMTools Package Notifications.

- Select the company which provides the notifications, select the service and follow on-screen prompts to complete setup. See appropriate TechNote for further information.

Notices

- There is a tab for each notice type.
- Enter the title of each notice as well as the text you would like on the notice. Also enter when you would like to print the notices.
- Email delivery is available for Mailbox notices. To set up email notices for existing mailboxes, choose "Setup for mailboxes". You have an option to "Copy emails to store."

Other

- Cycle and term defaults: This will be your due date and the most common term you rent by in your store.
- Choose to enable or disable proration on your rentals.
- How many additional names will you allow to get mail in the box?
- How many days past the due date will you wait before applying the late fee?
- Choose the CMRA Quarterly Report cycle that best reflects the needs of your local Postmaster.

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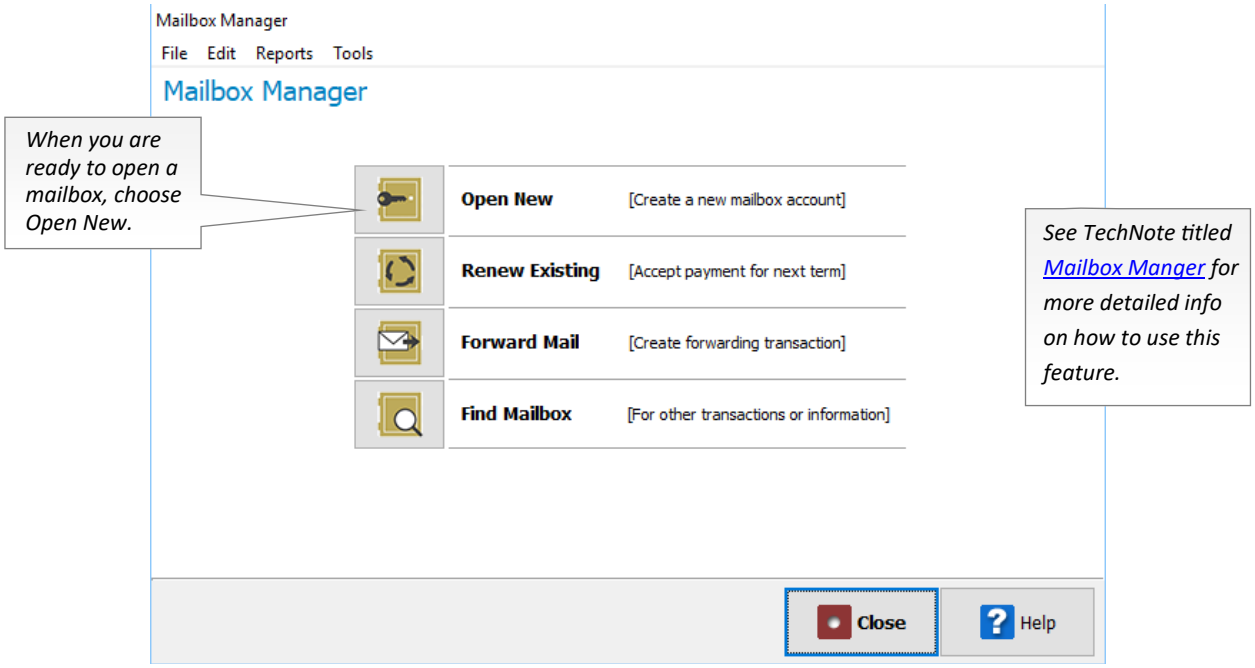
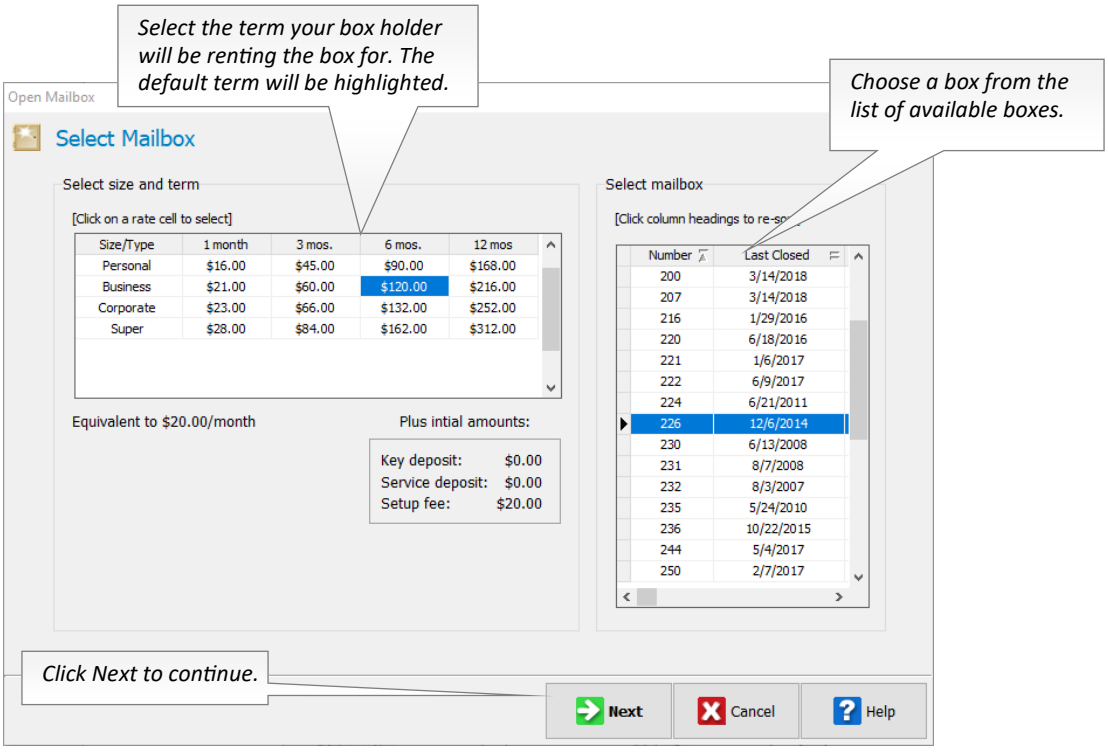
Opening a Mailbox

Follow the steps below to open a new mailbox. If you have existing mailboxes you need to enter, go to **Tools > Enter Existing Mailbox Accounts**. The process is similar and allows you to quickly enter existing mailbox information.





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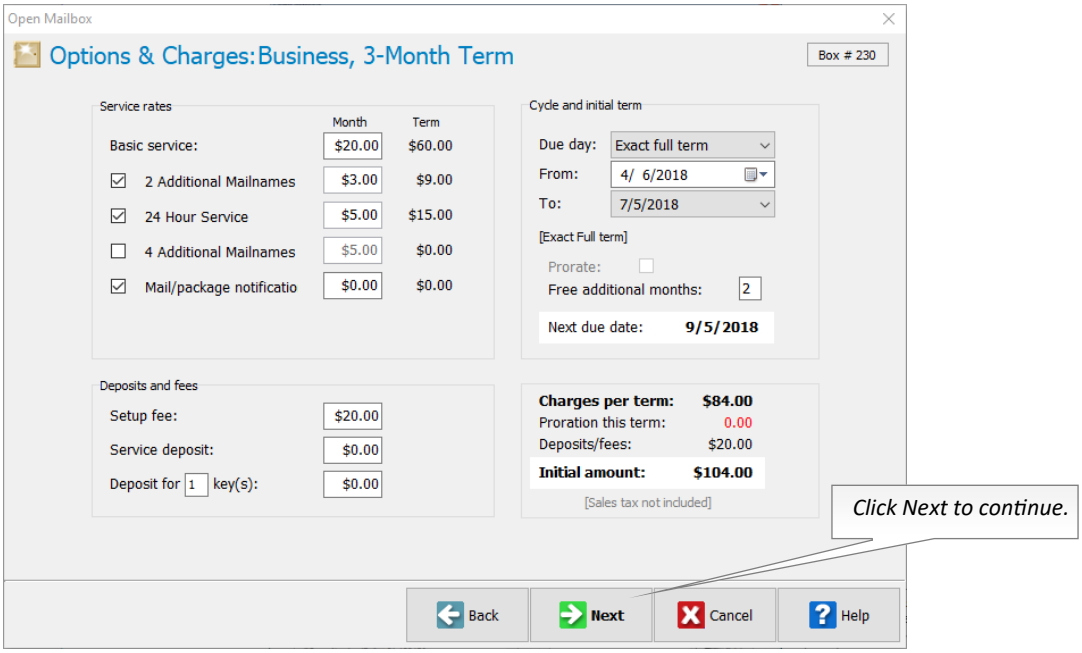
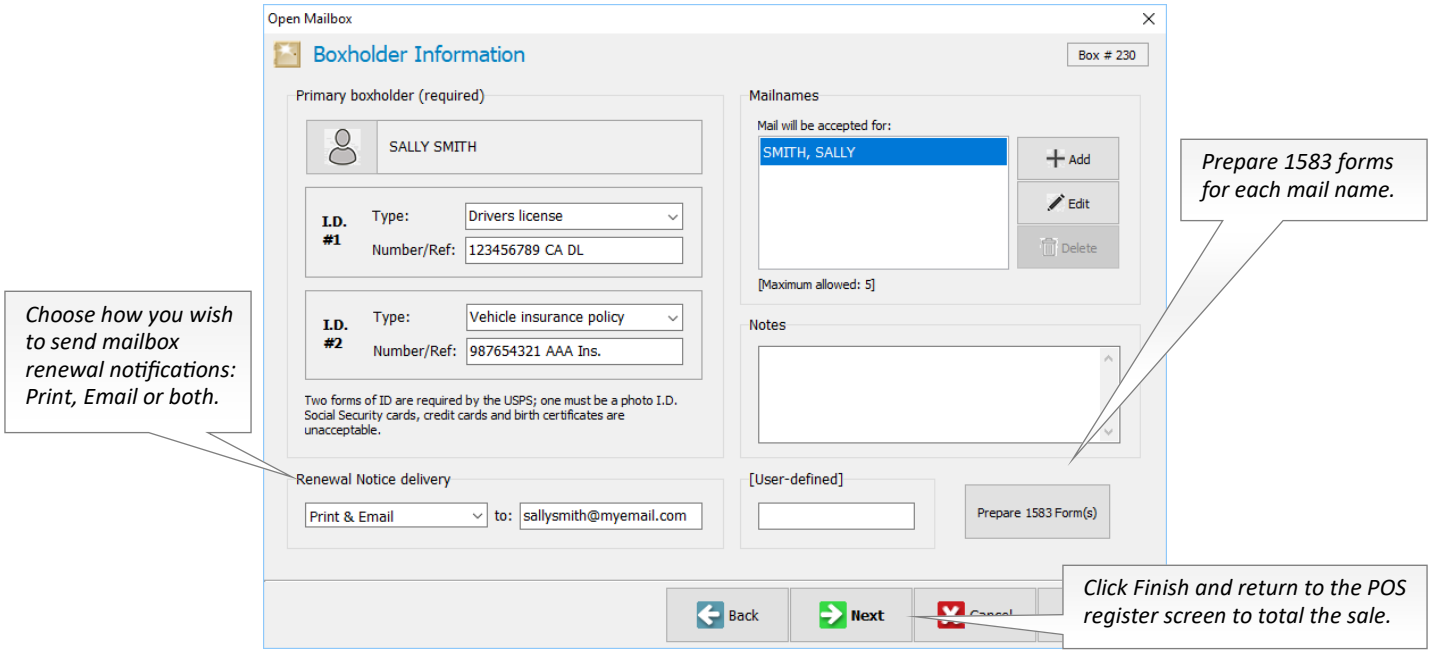
▶ Opening a Mailbox continued…

- Choose the services that apply to this box holder and select the appropriate due dates, fees, and proration.



- Assign a customer to the box. You may select from your existing customer database or add a new customer.
- Enter ID as required by USPS.
- Enter any additional names that will receive mail in this box.
- Use the 1583 button to print the required form for each box holder.



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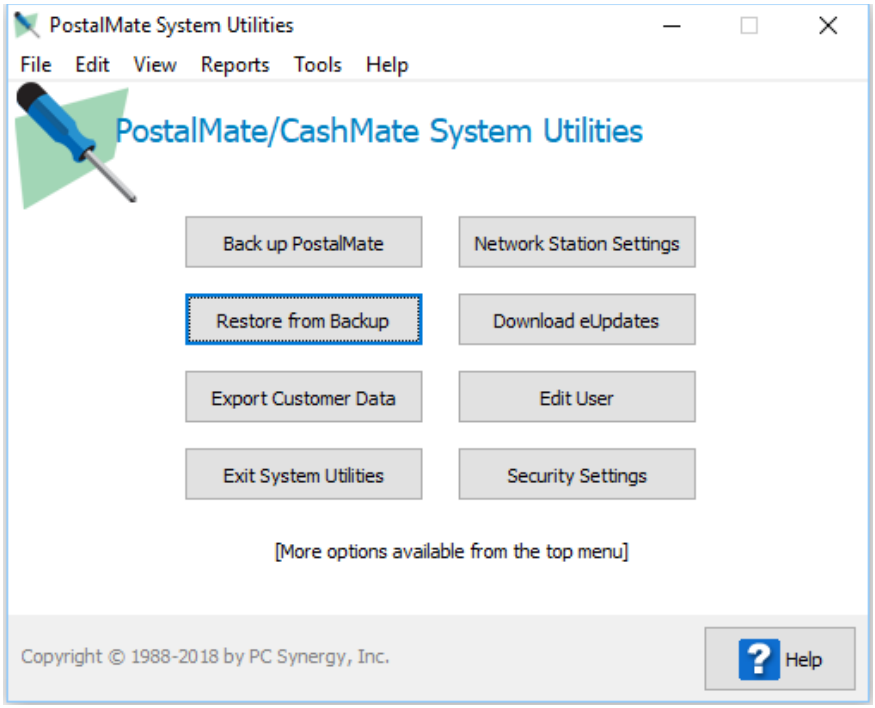
Although it is separate from the PostalMate and the CashMate POS, the PM System Utilities program is an essential part of the PostalMate system. To access PM Utilities, close PostalMate and CashMate, then open PM Utilities using your desktop shortcut or choose **Start > All Programs > PostalMate > PM Utilities.**

▶ PostalMate System Utilities Features

Below is a list of most common features in PostalMate Utilities. Use the TechNote associated with each topic to get more detailed information on the feature.

- Setting up a PostalMate Network
- PostalMate Backup and Restore
- Exporting Customer and/or Ship To data
- Importing Customer and/or Ship To data
- Security and Log-on Settings
- Time Clock Setup
- Auto log-on to the PC Synergy website



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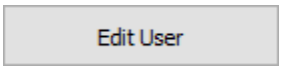
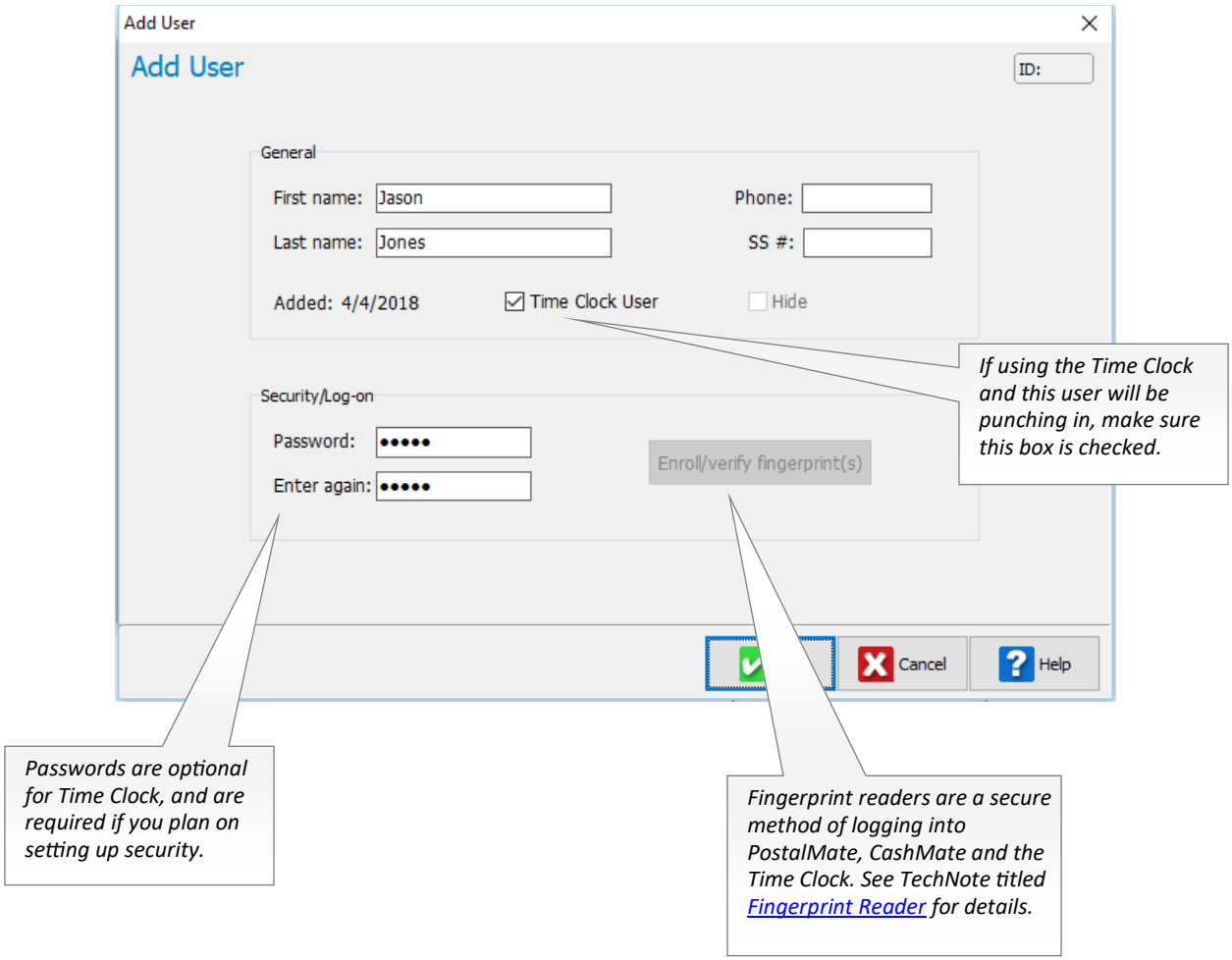
Adding Users and log-on settings

You can add users to the program and configure PostalMate and/or the POS to require a user log-on for each transaction. Having users "tied" to a transaction allows you visibility in day to day transactions and in the POS you have an additional benefit of user sales and transaction reports.



In PM Utilities, choose Edit User. Choose the "Add" button. First and last name are required fields.



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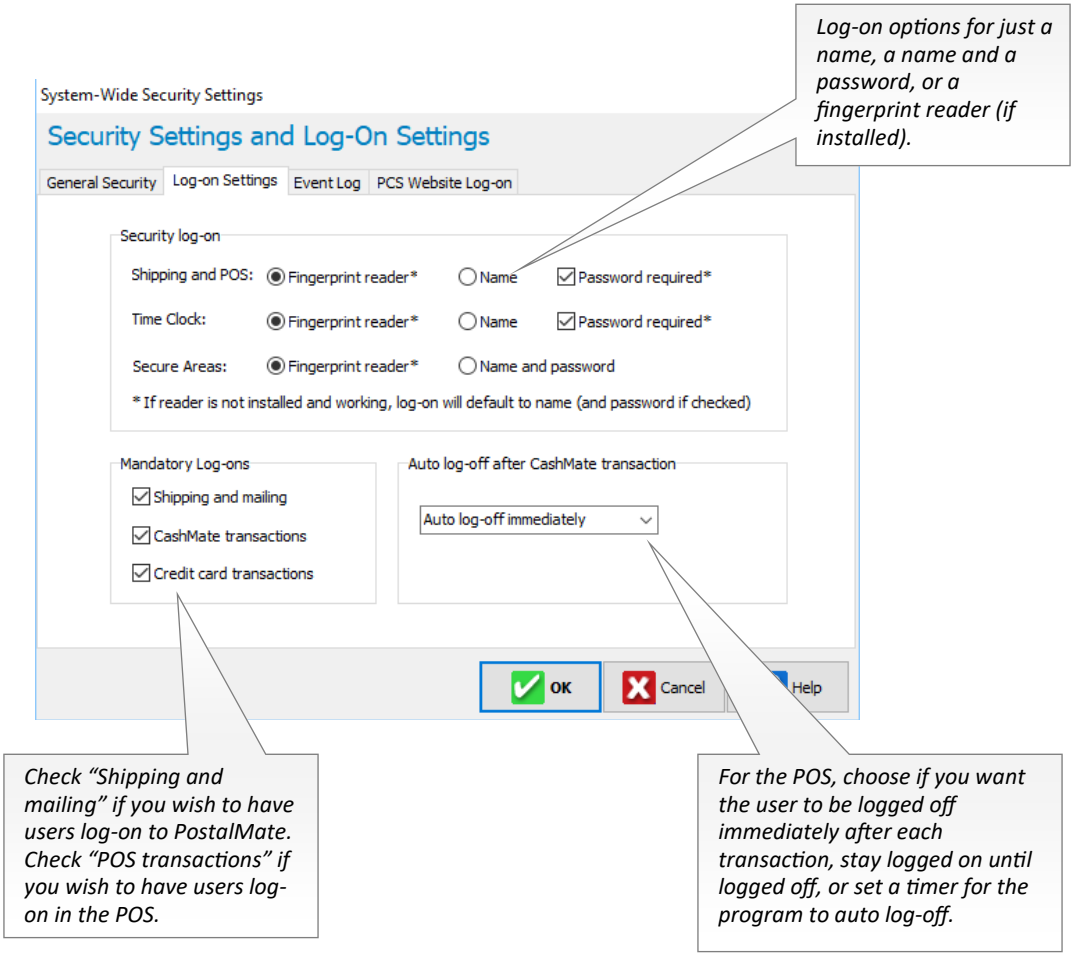
Log-on settings

In PM Utilities choose the **Security Settings** button. Choose the **Log-on Settings** tab.

Here is where you choose which programs you wish to require a log-on as well as the method of how they will log on to each area.



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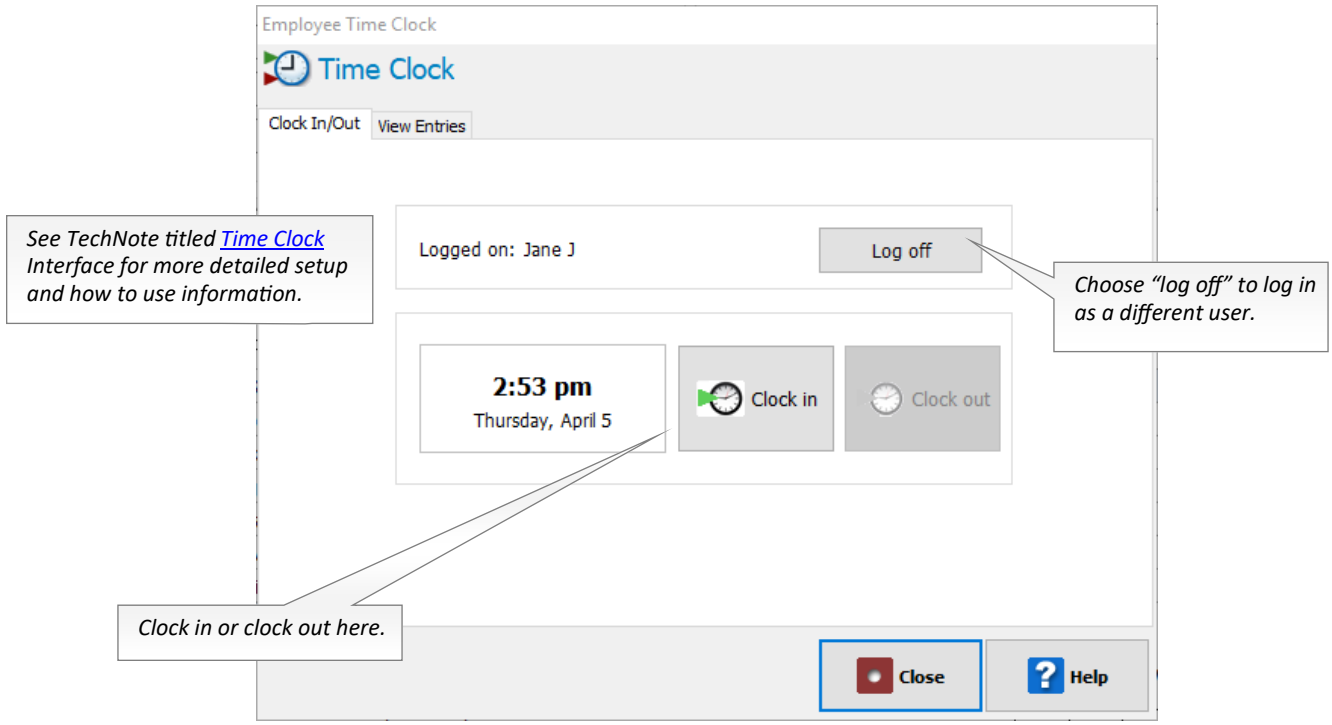
A full-feature Time Clock is integrated with PostalMate, to assist you in keeping track of employees hours. It utilizes the existing User database in PostalMate, which is also used for Security and PostalMate and CashMate log-ons.

Using the Time Clock

You can access the Time Clock from any of the following locations.

1. Time Clock shortcut: Create a shortcut on your desktop. Choose **Start > All Programs > PostalMate**. Right –click on Time Clock and choose Send to > Desktop (create shortcut).
2. PostalMate: Choose **Everyday Tools > Time Clock.**
3. POS: Choose **Tools > Time Clock**.

Launching the Time Clock will require a user log-on. Depending on your settings, you can log-on with a name, a name and password, or using a fingerprint reader.



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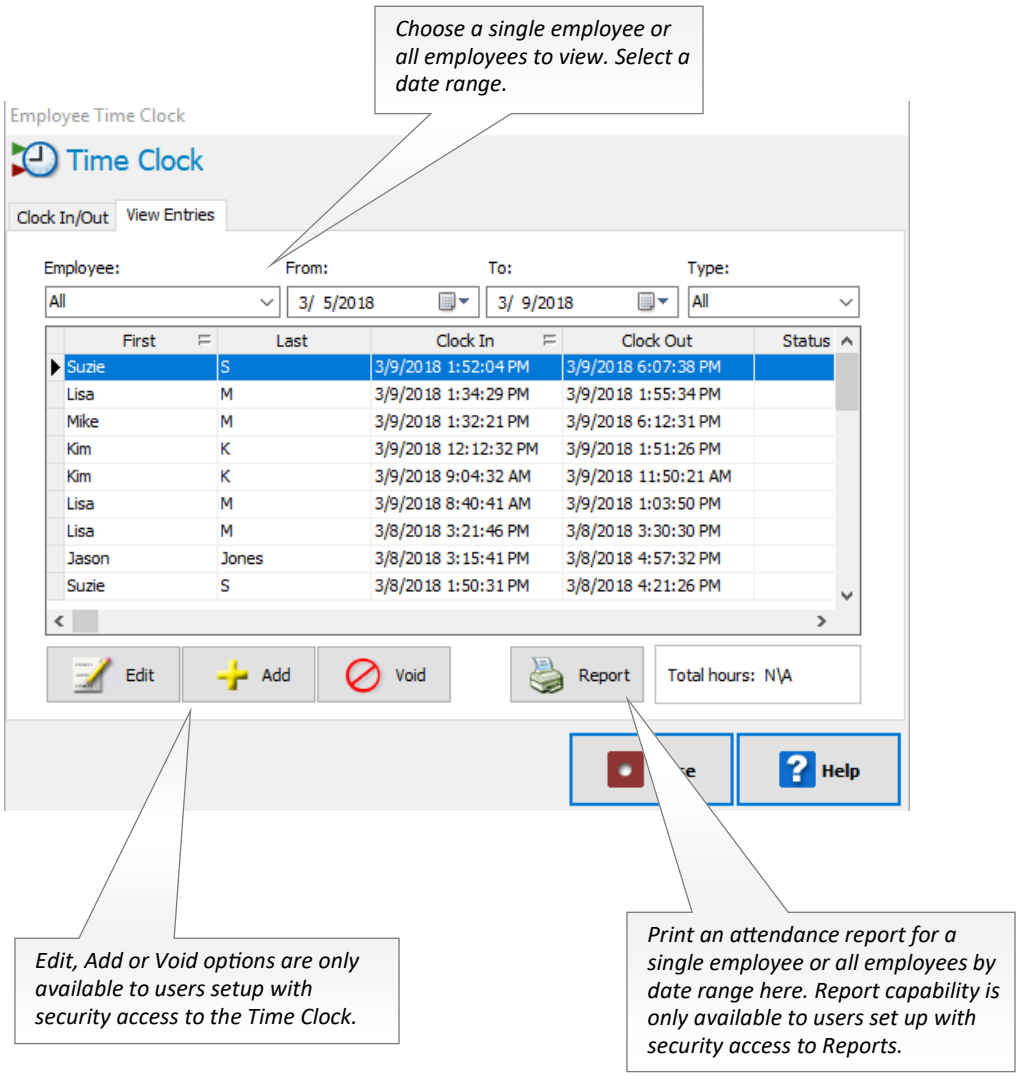
▶ Time Clock Continued…

For time keeping activities, choose the "View Entries" tab. All users can view their own entries. Only users set up with security access to the Time Clock and reports will have the ability to Edit, Add, Void, or Print Time Clock attendance reports.



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Other Features

Once you are done with your setup you should check out the features below. You can find details on each feature by clicking on the **Help** button in PostalMate or CashMate or on our website.

Reports

Both the shipping and register areas of the software contain extensive reporting including time analysis reports, inventory, profit, and the cash accounting report which can be imported into your accounting software. In PostalMate or CashMate use the Reports menu to access any report.

Carrier Billing Reconciliation

An easy way to reconcile shipping charges in PostalMate with carrier billing. In PostalMate, choose **Tools > Reconcile Carrier Billing**.

Tracking

Track your packages right from PostalMate! Search for the package in **Find Package > Track.**

Security

Security is important, especially when you have multiple shifts of employees. Use PostalMate's security settings to secure those areas prying eyes shouldn't see. Protect your settings and keep those rates unchanged until you are ready to change them.

Additional Carriers

Using a regional carrier or a carrier not supported in the system? You can add it yourself! Your added carrier will show up on the rate screen.

Networking

Set up a network in your store with as many systems as you choose. See TechNote Networking PostalMate for more information.

Certified Partners

PC Synergy works hard to develop and maintain relationships with other vendors in the industry. This is our "Certified Partner" program and includes companies like RS Associates, OLSON & IVES, Endicia, VSoftwareTools, Shipsurance, Smart Alert and FotoZoomer. Keep reading your update guides and check the Certified Partner page of www.pcsynergy.com for information on new partners. Visit with our partners and get more training at our regional training events.

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Notes

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