



Getting Started

PC SYNERGY

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

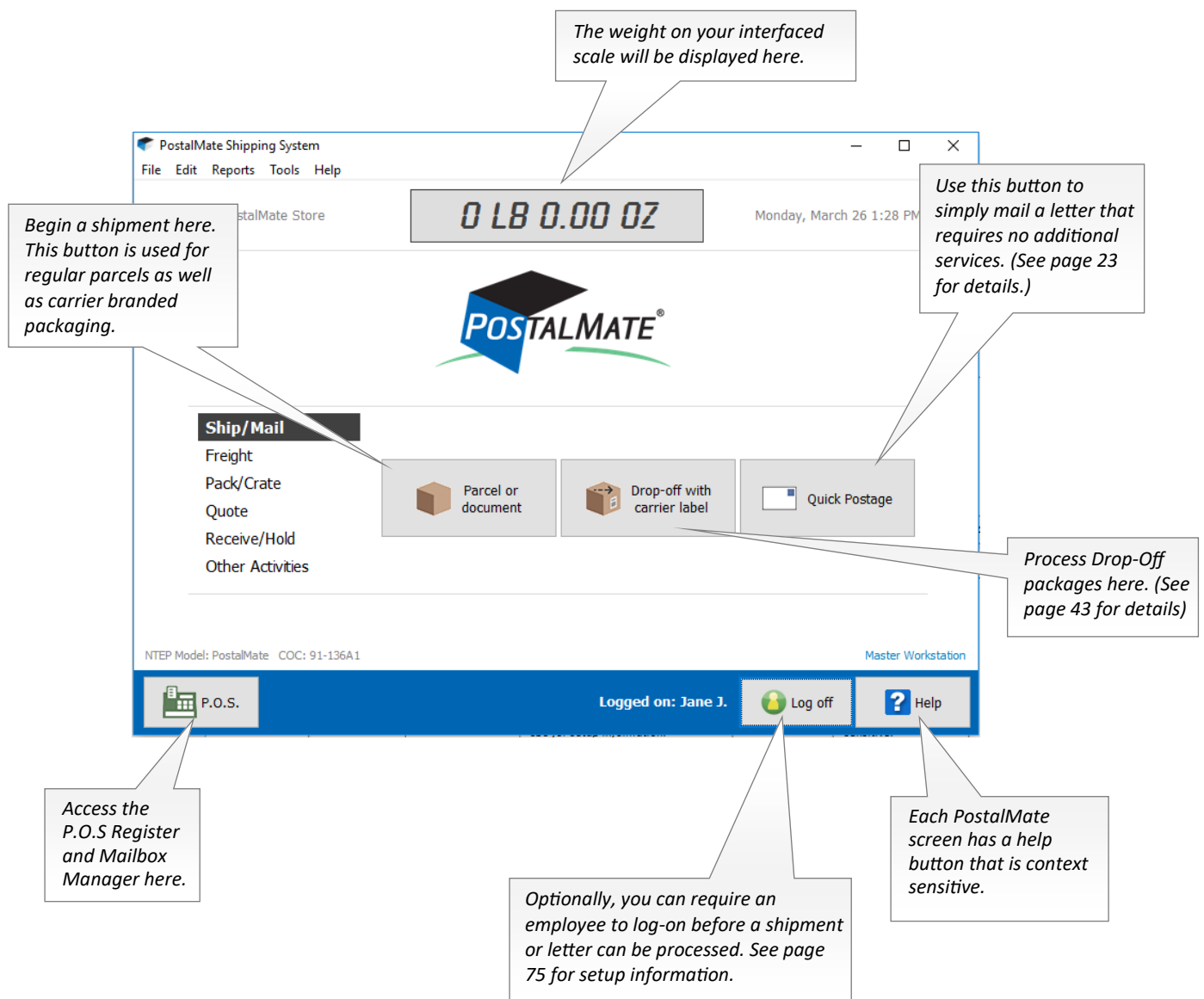
Review these sections:

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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.



► 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.

The screenshot shows the PostalMate Shipping System interface. At the top, there's a header with "PostalMate Store", a weight display "0 LB 0.00 OZ", and the date/time "Monday, March 26 1:55 PM". Below this is the "POSTALMATE" logo. A left sidebar contains a menu with "Ship/Mail", "Freight", "Pack/Crate" (highlighted), "Quote", "Receive/Hold", and "Other Activities". The main area displays three buttons: "Pro Pack With Shipment", "Pro Pack No Shipment", and "Retrieve Pro Pack Estimate". The bottom status bar shows "NTEP Model: PostalMate COC: 91-136A1", "P.O.S.", "Logged on: Jane J.", and a "Help" button.

Callout 1 (Pro Pack With Shipment): Pro Pack with shipment begins packing estimate including a shipment. This can also be accessed when shipping a Parcel through Ship/Mail.

Callout 2 (Pro Pack No Shipment): Use this option if you are performing a "Pack only" job that requires no shipment.

Callout 3 (Retrieve Pro Pack Estimate): Click here to retrieve Pack Later estimates.

► Other Activities

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

The screenshot shows the PostalMate Shipping System interface. At the top, a digital scale displays "0 LB 0.00 OZ". Below the scale is the PostalMate logo. A sidebar on the left lists "Ship/Mail", "Freight", "Pack/Crate", and "Other Activities" (which is highlighted). The main area contains six buttons: "Carrier Pickup", "Find Package", "Void Shipment", "Zero Scale", "Time Clock", and "Last Package Label(s)". A bottom bar shows "NTEP Model: PostalMate COC: 91-136A1", a "P.O.S." icon, "Logged on: Jane J.", "Log off", and "Help".

Carrier Pickups are to be done on a daily basis when your carrier arrives.

Package History includes all information related to the shipment, provides you the ability to track packages online and allows you to re-print labels and customs forms as needed.

Void a shipment or a drop off.

Reprint your last package label(s).

Set scale weight to zero.

Employee Time Clock.

► Customer and Ship To screens

PostalMate Shipping System
File Edit Reports Tools Help

0 LB 0.00 OZ Tuesday, March 20 11:39 AM

Customer: APPLE PIE CO.

Enter Company Name

Search by
☐ Last name ☐ Customer ID
☒ Company ☐ Phone
☐ User-defined ☐ User-defined

APEX
 22751 Cove View
 SAN MARCOS, CA, 92069
 USA 909.244.6189

APEX CONTRACTING AND CONSULT
 41745 ELM ST STE 402
 MURRIETA, CA, 92562
 USA 9514459664

APEX PHYSICAL THERAPY
 40675 CALIFORNIA OAKS RD STE D
 MURRIETA, CA, 92562
 USA

APPLE PIE CO.
 24516 RUNNING SWAN
 MURRIETA, CA, 92563
 USA

Start typing to search for a Customer.

Select a search option. The default "Search by" can be changed. See page 41 for details.

Touch screen users benefit from the on-screen entry buttons.

Add, Edit or Delete a customer.

PostalMate Shipping System
File Edit Reports Tools Help

0 LB 0.00 OZ Tuesday, March 20 11:39 AM

Ship To:

Enter Zip Code

Search by
☐ Last name ☒ Zip Code
☐ Company ☐ Country

☒ Show only records for this customer

LA ATMOSPHERE
 3131 F LAKE AVE
BOSTONIA, CA, 92021
 USA

ENDICIA
 278 CASTRO ST
MOUNTAIN VIEW, CA, 94041
 USA

Start typing to search for a Ship To.

Create your own customer address book. As you add and ship for customers, check this box to show the list of who the selected customer has shipped to in the past.

Use the Back and Next buttons to navigate back and forth through the screens. Use Cancel to start over.

► Add Ship To

Address Auto-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.

Add ShipTo:

Add ShipTo:

Country: USA

First/last name:

Company: ENDICIA

Address line 1: 278 castro

Address line 2: 278 Castro St, Mountain View, CA 94041-1204
None of the above

Zip code: 94041

City, State: MOUNTAIN VIEW, CA

Classification: ☒ Residential address

Phone number: 800.576.3279 E-mail: support@endicia.com

ENDICIA
278 castro
MOUNTAIN VIEW, CA 94041
USA

Status: This address has not been verified

Address verification will add the +4 zip code.

Use Copy from Customer if the Ship To information is the same as the customer.

Turn on Address Auto-Complete in PostalMate Settings under Shipping Settings on the "Other" tab.

See the results of the address verification here. If you still aren't sure on the classification, use Google Maps to zoom in and get a street view of the address.

► Weight screen

PostalMate Shipping System

File Edit Reports Tools Help

5 LB 0.0 OZ
Weight Override

Tuesday, March 20 12:43 PM

Weight

Enter weight

5 Lbs. 8 Oz.

7 8 9
4 5 6
1 2 3
0 . <-
Tab

Manually enter the weight in pounds and ounces. If a scale is connected, you may wish to turn off this manual weight entry prompt.

► 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.

PostalMate Shipping System

File Edit Reports Tools Help

POSTALMATE®

5 LB 0.0 OZ
Weight Override

Tuesday, March 20 12:43 PM

Packing

Packed by

☒ **Customer**
No additional packing done by store

☐ **Pro Pack**
Professionally packed in store

Packed by Customer is the default.

Choose Pro Pack if you are packing the item professionally in your store and want Pro Pack to calculate the box and labor for you.

Back Next Cancel Help

See TechNote titled [Getting Started with Pro Pack](#) for complete details.

► Pro Pack continued...

PostalMate Shipping System

File Edit Reports Tools Help

POSTALMATE®

5 LB 0.0 OZ
Weight Override

Tuesday, March 20 12:45 PM

Packing

Packed by

☐ Customer
No additional packing done by store

☒ Pro Pack
Professionally packed in-store

Process

☐ Pack now
Do packing while customer waits

☒ Pack later
Charge now, pack when convenient

☒ Advanced mode

Choose **Pack now** if you are packing the shipment while the customer is in front of you. Choose **Pack later** to charge now and pack later.

Choose **Pro Pack** to start the estimating process.

Back Next Cancel Help

PostalMate Shipping System

File Edit Reports Tools Help

POSTALMATE®

5 LB 0.0 OZ
Weight Override

Tuesday,

Pro Pack: Item(s) to be packed

Item characteristics

Dimensions: 6 x 4 x 2

Description: WIDGET

☒ Can rotate to fit (uncheck for tall items)

More Detail

Enter the dimensions of the object you are packing.

Choose "More Detail" to enter the description, empty space, value and quantity of items.

Select from either column:

Non-breakable	Unbreakable contents, such as clothing, paper items, sports equipment.
Semi-fragile	Items that are sturdy but could be subject to minor damage if subjected to impact, including wooden objects, hardbound books, toys and fruit.
Fragile	
Very fragile	
Delicate	Items that should be well-protected against impact, shock, or vibration. Examples are small appliances, inexpensive

There are five Fragility levels that determine the proper box size and how much additional labor is charged. Both short and long descriptions can be set by you. Hovering your cursor over the description displays the entire verbiage.

Find Kit Back Next Cancel Help

► 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.

Configuration: Regular box

Box 8 x 6 x 4, unmodified
Min. cushioning: 1" Quantity on hand: 0

Box w/wrap/fill
Box only
Box w/fill
Box w/wrap/fill
Double box w/wrap/fill
Box w/double wrap/fill

Modify

Double-click on image for exploded view, drag to rotate

Full view

Clear All **Restore Defaults**

Check quantity on hand for items in red

OUTER CONTAINER		
1	Bubble foot - Sm	1.00
	0.79 square feet	
1	Peanuts	1.00
	0.05 cubic feet	
1	BOX 8 X 6 X 4	2.99

Your inventory is checked for sufficient quantities on hand.

Time: 9 min. \$6.75 **Materials: \$4.99** **Total: \$11.74**

Back **Next** **Cancel**

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

Box Diagram

Diagram

Select any item to...

Wrap: 7" x 3" x 5"
Filler: 8" x 4" x 6"
Box: 8" x 4" x 6"

POSTALMATE

Outside dimensions:
8.5 x 6.5 x 5

View

Assembled
Exploded

Zoom in
Zoom out

Click/touch image to rotate

Close **Help**

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

► Pro Pack continued...

PostalMate Shipping System

File Edit Reports Tools Help

Pro Pack: Job Overview

Configuration: Regular box

Box w/wrap/fill

Box only
Box w/fill
Box w/wrap/fill
Double box w/wrap/fill
Box w/double wrap/fill

Clear All Restore defaults

Box 8 x 6 x 4, unmodified
Min. cushioning: 1" Quantity on hand: 0

Modify

Double-click on image for exploded view, drag to rotate

Full view

Select or double click to modify:

OUTER CONTAINER	
1 Bubble foot - Sm	1.00
0.79 square feet	
1 Peanuts	1.00
0.05 cubic feet	
1 BOX 8 X 6 X 4	2.99

Check quantity on hand for

Save as Kit

2 lb. 13.76 oz. Time: 9 min. \$6.75 Materials: \$4.99 **\$11.74**

Back Next Cancel Help

Choose the "Modify" button for more box options.

"Modify" gives you more options on how to pack the object.

Container Materials

Materials for Outer Container

Box Fill Wrap Liner Additional

Desired finished size: 8 x 6 x 4 Min. cushioning: 1 inches Object size: 6 x 4 x 2
Optimum box size: 8 x 6 x 4
Optimum cushioning: 1.00"

Select option:

Stock: Box 8 x 6 x 4, unmodified
Min. cushioning 1.00 Time: 0 min. Materials + Labor: \$2.99

Build: Box 8 x 6 x 4, built from scratch
Min. cushioning 1.00 Time: 15 min. Materials + Labor: \$5.49

Resize: Box 12 x 12 x 12, cut down to 12 x 12 x 6
Min. cushioning 2.00 Time: 8 min. Materials + Labor: \$3.79

Reconfigure corners Cut down height

BOX 20x20x10
BOX 24 X 9 X 6
BOX 10 X 10 X 10
BOX 10 X 8 X 6
BOX 12 X 10 X 6
BOX 12 X 12 X 40 LAMP/TALL
BOX 12 X 12 X 48
BOX 12 X 12 X 12
BOX 14 X 14 X 10

Qty on hand: 8

Show option to combine two boxes

Entire job with this selection: 7 lb. 3.53 oz. 17 min. **\$19.54**

OK Cancel Help

Choose the tabs for "Box", "Fill", "Wrap", and "Liner" to add or make changes for this packing job if needed.

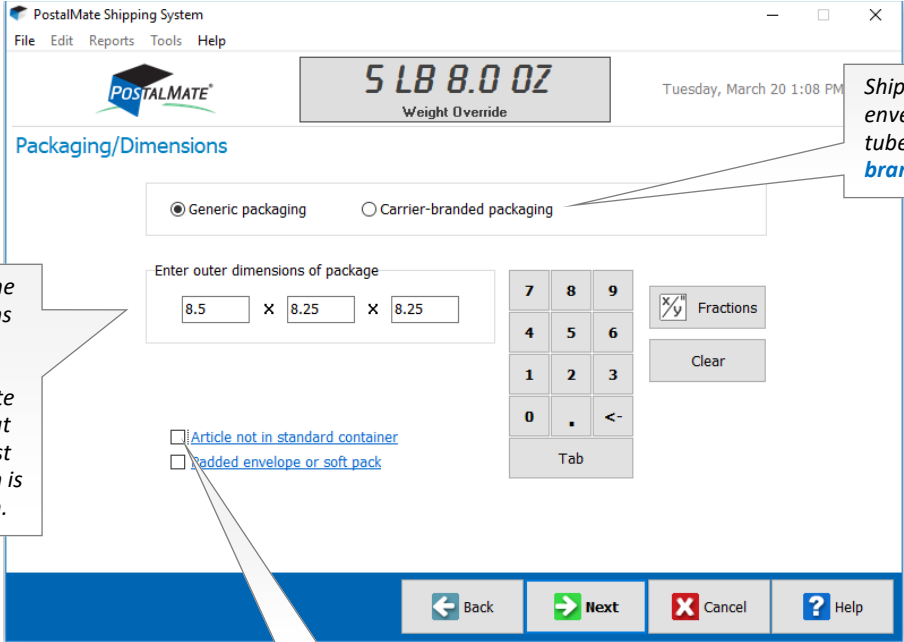
Choose a Stock box, build a box or resize a box. Each option will calculate the time needed for the pack job and update labor automatically.

Select "Reconfigure corners" or "Cut down height" for additional options for creating the best sized box for the packing job.

Want to combine boxes? Check here.

► 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.



The screenshot shows the 'Packaging/Dimensions' screen in the PostalMate Shipping System. The window title is 'PostalMate Shipping System' and the menu bar includes 'File', 'Edit', 'Reports', 'Tools', and 'Help'. The PostalMate logo is in the top left. A large digital scale display shows '5 LB 8.0 OZ' with 'Weight Override' below it. The date and time 'Tuesday, March 20 1:08 PM' are in the top right. The main heading is 'Packaging/Dimensions'.

Below the heading are two radio buttons: 'Generic packaging' (selected) and 'Carrier-branded packaging'. A callout points to these buttons: "Shipping a carrier envelope, box or tube? Choose **Carrier-branded packaging**."

Underneath is a section 'Enter outer dimensions of package' with three input fields containing '8.5', '8.25', and '8.25', separated by 'x' symbols. A callout points to these fields: "Enter in the dimensions in any order—PostalMate knows that the longest dimension is the length."

To the right of the dimensions is a numeric keypad with digits 0-9, a decimal point, and a left arrow. It also has buttons for 'Fractions' (x/y), 'Clear', and 'Tab'.

Below the dimensions are two checkboxes: 'Article not in standard container' and 'Padded envelope or soft pack'. A callout points to the first checkbox: "Checkmark **Article not in standard container** and the appropriate additional handling charges will apply."

At the bottom are four buttons: 'Back' (with a left arrow), 'Next' (with a right arrow), 'Cancel' (with a red X), and 'Help' (with a question mark).

► 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.

► 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.

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

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

► 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.

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.

The carrier logo will display here after selecting a service.

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

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

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

Service	Rate	Delivery Date/Time
FedEx Home Delivery®	\$72.71	Fri 3/23 by end of day
USPS Priority Mail®	\$76.18	2-4 DAYS Not Guaranteed
USPS Priority Mail Express™	\$100.83	1-3 DAYS
FedEx Express Saver®	\$135.99	Fri 3/23 by 8:00 PM
FedEx 2Day®	\$185.61	Thur 3/22 by 8:00 PM
FedEx 2Day® A.M.	\$212.97	Thur 3/22 by 10:30 AM
FedEx Standard Overnight®	\$351.78	Wed 3/21 by 8:00 PM
FedEx Priority Overnight®	\$366.32	Wed 3/21 by 10:30 AM

► 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.

Customs Information: Contents Type

What does this package contain?

☐ Documents Only documents with no commercial value

☐ Goods Anything other than the above

Select if the package contains Documents or Goods.

Customs Information: Gift or Sale

Is this a gift?

☐ Gift This package contains only gift items

☐ Not a Gift At least one item in this package is not a gift

Select if the package contains a gift or a commercial shipment.

Customs Information: Declaration of Goods

Enter all items in this package: * Enter the value PER UNIT

Qty	Unit	Lbs	Oz	Country of Manufacture	Description	Value*	Harmonized Code
5	EA	3	8	USA	T-shirts	\$5.00	
1	LB	0	8	USA	Candy	\$5.00	

Total Qty: 6 Total Customs Value: \$30.00 Total Weight: 4 lbs.

Remarks to include on customs document:

Packaging type:

Harmonized Codes are optional but may expedite delivery and passage through customs. Find Harmonized Code Online

Name for signature line: KELLY JOHN

☒ I, KELLY JOHN, agree that the information on this screen is correct, and agree to the [Conditions of Contract](#)

Enter all items in the package. The form must be fully completed with exception to Harmonized Code, which is optional.

Back Next Cancel Help

► 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.

PostalMate Shipping System
File Edit Reports Tools Help

FedEx service marks are owned by Federal Express Corporation and used by permission.

Add-Ons

Choose additional options:

<input type="checkbox"/>	FedEx Date Certain Home Delivery® Delivery will be made on specified date	\$4.30
<input type="checkbox"/>	FedEx Evening Home Delivery® Delivery will be made between 5:00 PM and 8:00 PM	\$10.05
<input type="checkbox"/>	FedEx Appointment Home Delivery® FedEx will contact recipient in advance to arrange date and time	\$21.45
<input type="checkbox"/>	FedEx® Delivery Signature Options A specified recipient signature is required upon delivery	\$0.00-\$9.36

Declared value: \$500 [Alt: \\$400](#) Charge: \$0.00

Total package cost including add-ons: \$26.44

Back Next Cancel Help

The Retail rate for the add-on displays here.

Descriptions of add-ons are displayed.

If you use Alternate Insurance, you can change the allocation here.

FedEx Delivery Signature Options

Choose one

<input type="radio"/>	No Signature Required	\$0.00
<input type="radio"/>	Indirect Signature Required	\$8.92
<input checked="" type="radio"/>	Direct Signature Required	\$8.92
<input type="radio"/>	Adult Signature Required	\$9.36

Direct Signature Required
FedEx will obtain a signature from someone at delivery address

For non-residential destinations, FedEx will attempt to obtain a signature at the delivery address or neighboring address; no fee will apply unless you upgrade to 'Direct' or 'Adult'.

FedEx service marks are owned by Federal Express Corporation and used by permission.

OK Cancel Help

For add-ons with choices, a pop-up screen will display with rates and additional information.

If you use Alternate Insurance, you can change the allocation here.

► Review & Confirm screen

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

PostalMate Shipping System
File Edit Reports Tools Help
FedEx service marks are owned by Federal Express Corporation and used by permission.

Review & Confirm Total shipping cost includes all service charges A942

FedEx Ground®
Expected arrival: Wed 4/11 by end of day
Declared value: \$500.00

Ship To:
PC SYNERGY
804 N Twin Oaks Valley Rd
SAN MARCOS, CA 92069
USA

Charges:
Shipping: \$15.11
Declared value: \$0.00
Add-Ons: \$0.00
Pro Pack: \$0.00
Materials: \$0.00
Sales Tax: \$0.00
Total: \$15.11

☐ Save as POS Quote

Contents: CONTENTS GO HERE

Buttons: Back, Another, Finish

Notify Options: [Minus Button]

Annotations:

- Your wholesale "A" rate will display here. See page 41.
- Use the **minus** button to give your customer a discount if you choose. More discount options are available in CashMate.
- Enter the contents of the shipment here. See page 36 for info on how to make the contents field mandatory before completing a shipment.
- Choose **Finish** to complete the shipment and print the shipping label.
- Use the **Another** button to ship multiple packages for the same customer.
- When set up, **Email Notification** allows you to automatically send an email to your Customer (or Ship To) when the package has been picked up by the carrier. Delivery emails can also be sent automatically to your customer when the package has been delivered.

► 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.

PostalMate Shipping System
File Edit Reports Tools Help

Drop-Off:

Scan or enter tracking #

9405510200882698951279 ☒ OK

Tracking Number	Carrier	Amount
780291936333	FedEx	0.
127782560394669957	UPS	0.
9405510200882698949597	USPS	0.
▶ 1151177904	DHL	0.

☐ Do not print receipts Packages: 4 amount: \$0.00 Options: \$2.00 Tax: \$0.00 **Total: \$2.00**

Optional

Applies to all packages:

Applies only to selected package:

☒

Contents:

Scan or enter the drop-off tracking number here....

You have the opportunity of providing (and charging for) an email notification to your customer once the package has been delivered.

Drop-off insurance is available if you use Shipsurance or RS Package Insurance as an alternate insurance provider.

Enter the contents of a drop-off, if desired.

Click here if you wish to not print a receipt for a specific drop-off transaction.

If PostalMate can't determine the carrier from the tracking #, click here for a drop-down list of carriers.

When all packages have been entered, click here.

► 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.

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

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

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.

The screenshot shows the 'Quick Postage' interface within the 'PostalMate Shipping System'. At the top, there's a menu bar with 'File', 'Edit', 'Reports', 'Tools', and 'Help'. Below it, a digital scale displays '0 LB 10 OZ' and the date 'Thursday, March 7, 2014 10:44 AM'. The main section is titled 'Quick Postage' and features the USPS logo and 'USPS First-Class Mail® [Letter]'. There are tabs for 'First Class Mail', 'Priority Mail', and 'Media Mail'. Under 'First Class Mail', there's a 'First Class Letter' option with a price of '\$9.50'. A 'Postcard' dropdown menu is also visible. To the right, there are links for 'Guidelines'. Below the pricing, there are checkboxes for 'Certified' (checked), 'Return Receipt' (checked), and 'Nonmachinable' (unchecked). Each has a corresponding price: '\$4.80', '\$4.10', and '\$0.00' respectively. A 'Stamp' button shows '\$0.00'. At the bottom, there's a 'Total pieces recorded: 0' and 'Charges: \$0.00'. A 'Quantity like this: 1 @ \$9.50 = \$9.50' is shown next to a 'Record' button. A 'Close' button is at the bottom right. A 'Use Printable Postage' checkbox is checked. A 'Tracking Number(s)' dialog box is open at the bottom, showing a 'Scan or enter tracking number(s):' field with an 'OK' button. Below this, there's a table with 'Certified Tracking #' and 'Return Receipt Tracking #' columns. The 'Certified Tracking #' column contains the number '9400110200881698742815'. A 'Delete' button is next to the table. At the bottom of the dialog, there's a 'Count: 1' and buttons for 'OK', 'Cancel', and 'Help'.

► 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).

Carrier Pickup

Carrier: FedEx Ground

Packages are going out for which carrier?

DHL

FedEx Express

FedEx Ground

UPS

USPS

This only lists carriers for which there are currently packages to be picked up.

Carriers will display when there are current packages to be picked up.

Carrier Pickup

Pickup Schedule

Is this your last FedEx Ground pickup today?

Yes

These are the last FedEx Ground packages going out today

No

More FedEx Ground packages may go out today

Choose **Yes** if this is the last pickup of the day and shipment dates will automatically be advanced to the next shipping day. Choose **No** if there are more packages going out today and you are not ready to advance your shipping day.

Back

Next

Cancel

Help

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

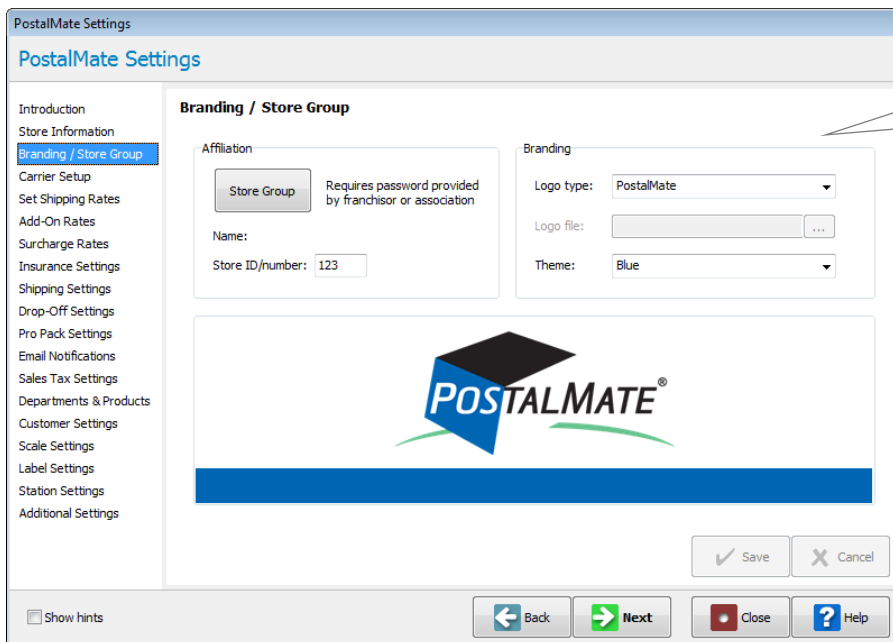
- Enter your store information.
- Your store address will be on the return address of all domestic, private carrier shipments. You are considered the shipper of record by all private carriers. With the exception of International shipments, your customer is not the shipper.
- PostalMate uses your Zip 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.

The screenshot shows the 'PostalMate Settings' window with the 'Store Information' tab selected. The left sidebar contains a list of settings categories: Introduction, Store Information (highlighted), Branding / Store Group, Carrier Setup, Set Shipping Rates, Add-On Rates, Surcharge Rates, Insurance Settings, Shipping Settings, Drop-Off Settings, Pro Pack Settings, Email Notifications, Sales Tax Settings, Departments & Products, Customer Settings, Scale Settings, Label Settings, Station Settings, and Additional Settings. The main area contains the 'Store Information' form with the following fields: Store name (PostalMate Store), Address line 1 (804 N Twin Oaks Villy Rd 122), Address line 2 (empty), City, state (SAN MARCOS, CA), Zip code (92069), Phone (760-410-1677), Fax (760-410-1696), E-mail (support@pcsynergy.com), and Contact name (PostalMate Support). At the bottom right are 'Save' and 'Cancel' buttons. At the bottom left is a 'Show hints' checkbox. At the bottom center are 'Back', 'Next', 'Close', and 'Help' buttons.

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.

► 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.



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Additional Settings

Branding / Store Group

Affiliation

Store Group Requires password provided by franchisor or association

Name:

Store ID/number: 123

Branding

Logo type: PostalMate

Logo file: ...

Theme: Blue

POSTALMATE®

✓ Save ✕ Cancel

☐ Show hints

← Back → Next

Close ? Help

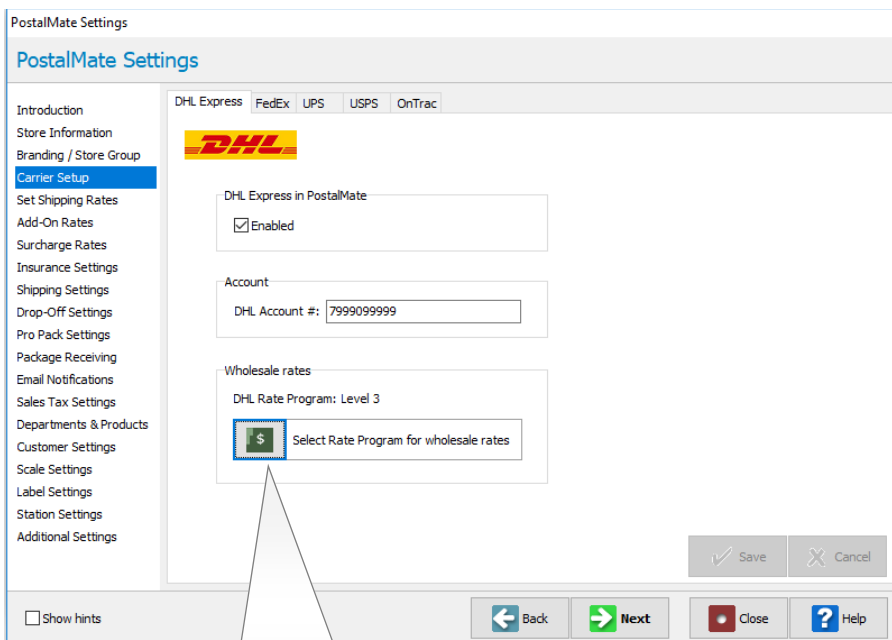
See TechNote titled [Custom Logo in PostalMate](#) for more information on setup.

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.



The screenshot shows the 'PostalMate Settings' window with the 'Carrier Setup' tab selected. The 'DHL Express' sub-tab is active, displaying the DHL logo and several input fields. The 'DHL Express in PostalMate' checkbox is checked and labeled 'Enabled'. The 'Account' section contains a text field for 'DHL Account #' with the value '7999099999'. The 'Wholesale rates' section shows 'DHL Rate Program: Level 3' and a button with a dollar sign icon labeled 'Select Rate Program for wholesale rates'. At the bottom right are 'Save' and 'Cancel' buttons. At the bottom left is a 'Show hints' checkbox. At the bottom center are 'Back', 'Next', 'Close', and 'Help' buttons.

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.

► 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.

Check these boxes to enable FedEx Express and FedEx Ground in your PostalMate.

Click to Subscribe online with FedEx.

Set your Tier levels for both FedEx Express and FedEx Ground.

Check the box if your store has a Saturday Pickup for FedEx Express and/or FedEx Ground.

- 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.

► 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.

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DHL Express FedEx **UPS** USPS OnTrac

UPS in PostalMate
☒ Enabled

Account
UPS Shipper #: YA95XX

Saturday pickup
☐ Store has Saturday pickup

Label
☐ Use Customer as return contact

Online shipping interface
UPS web services
Status: Registration Current
Register online with UPS

Wholesale rates
ASO Incentive Level: 5
Select Level and set wholesale rates

UPS, the UPS Shield trademark, the UPS Ready mark, the UPS Developer Kit mark and the Color Brown are trademarks of United Parcel Service of America, Inc. All Rights Reserved.

Save Cancel

Back Next Close Help

Show hints

Select UPS web services from the menu and click **Save**.

Register online for UPS web services.

Select this button to set your UPS wholesale rates.

- 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.

► 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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DHL Express | FedEx | UPS | **USPS** | OnTrac

USPS in PostalMate

☒ Enabled

Online shipping and postage require an Endicia account

Online shipping interface

Endicia: Label Server

Endicia settings

Wholesale rates

Price group: Commercial Base

Select price group for wholesale rates

Endicia Printable Postage

Endicia: Label Server

Printable Postage settings

Save Cancel

Back Close Help

Set your wholesale rates based on your price group.

- **Published:** USPS rate
- **Commercial Base:** Typical for most Endicia customers.
- **Approved Shipper:** For approved USPS shippers using Endicia.

*After selecting Endicia Label Server, choose the **Endicia settings** button to enter your Endicia account credentials and set your transaction and postage buying options.*

*Choose the **Printable Postage Settings** button to set defaults for Endicia Label Server Printable Postage. (A Dymo label printer is required for printing Printable Postage stamps.)*

► 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.

The screenshot shows the 'PostalMate Settings' window with the 'Set Retail Shipping Rates' tab selected. The left sidebar lists various settings, with 'Set Shipping Rates' highlighted. The main area is divided into 'Global rate-setting' and 'Advanced' sections. Callouts provide instructions for each step:

- Global rate-setting:**
 1. Base retail rates on: Choose One (dropdown menu with options: Published rates, Wholesale rates)
 2. Add a 50 % margin (input field)
 3. Check service(s) to apply the above to: (tree view showing DHL, FedEx Express, FedEx Ground, and FedEx Ground Home Delivery with expandable arrows)
 4. ☒ Apply & Save
 5. Repeat steps 1-4 as desired for any set of services
- Advanced:**
 - Fixed-rate services
 - Weight-based services
 - Cubic-rate services

Callout text boxes provide additional guidance:

- "Select whether you would like to base your retail rates on the published or wholesale rates." (points to step 1)
- "Use the Advanced rate setting options to fine tune your rates." (points to the Advanced section)
- "Global rates can be set by carrier service. Click '>' in front of the carrier to see a list of all services for that carrier." (points to the service tree)
- "Enter your desired margin or mark-up. You can select the box and use the carriers suggested retail rate when available." (points to the margin input field)

At the bottom, there are buttons for Back, Next, Close, and Help.

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.

► Set Shipping Rates continued...

View/Set Fixed Rates

View Fixed Rates ID:

FedEx Express All View: Profit %, retail over whole

Service	Zone	Rate
FedEx 2Day A.M. AK [flat rate]	Natl	% 35.22
FedEx 2Day A.M. AK [flat rate]	Natl	% 35.23
FedEx 2Day A.M. AK [flat rate]	Natl	% 35.19
FedEx 2Day A.M. AK [flat rate]	Natl	% 35.19
FedEx 2Day A.M. AK [flat rate]	Natl	% 35.21
FedEx 2Day A.M. AK [flat rate]	Natl	% 35.21
FedEx 2Day A.M. AK [flat rate]	Natl	% 35.19
FedEx 2Day A.M. Envelope	2	% 47.58
FedEx 2Day A.M. Envelope	3	% 47.45
FedEx 2Day A.M. Envelope	4	% 47.48
FedEx 2Day A.M. Envelope	5	% 47.48
FedEx 2Day A.M. Envelope	6	% 47.54
FedEx 2Day A.M. Envelope	7	% 47.51
FedEx 2Day A.M. Envelope	8	% 47.45
FedEx 2Day A.M. [AK] Envelope	9	% 47.48
FedEx 2Day A.M. [flat rate]	Local	% 35.27

Direct editing: Click on a cell and type in the desired rate. Using a formula: Select one or more cells, then press the Formula button.

Print Close Help

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.

► 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.

Choose the Carrier you wish to set Add-On rates for.

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Add-On Rates

Carrier: FedEx Express

Description	Wholesale	Retail
Adult Signature Required	\$5.75	\$9.83
C.O.D.	\$13.50	\$19.32
C.O.D. (Express Freight)	\$75.00	\$107.14
Direct Signature Required	\$4.75	\$8.87
FedEx® Hold for Pickup	\$0.00	\$0.00
Indirect Signature Required	\$4.75	\$8.87
No Signature Required	\$0.00	\$0.00

Non-standard Add-Ons

1. Add a % margin or % markup

Apply & Save

Advanced...

Save Cancel

Back

Close Help

Quickly add a margin or markup % to non-standard add-ons or use the Advanced button to set these rates individually.

► 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 “Addtl” column if you choose to charge a greater percentage than that of the carrier.

Click the drop down box and select the carrier you wish to set rates for.

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Surcharge Rates

Regular surcharges

FedEx Express
<Select carrier>
DHL
FedEx Express
FedEx Ground
UPS
USPS

	Wholesale	Retail
DHL	\$12.00	\$17.18
FedEx Express	\$140.00	\$193.85
FedEx Ground	\$26.00	\$36.83
UPS	\$26.00	\$36.83
USPS	\$26.00	\$36.83
DAS Commercial	\$2.70	\$3.89
DAS Extended Com	\$2.70	\$3.89
DAS Extended Res	\$4.40	\$6.29
DAS Hawaii Com	\$8.00	\$11.43
DAS Hawaii Res	\$8.00	\$11.43
DAS Residential	\$4.00	\$5.74
Extended Delivery	\$30.00	\$185.90

Fuel surcharges

To mark up fuel surcharges for retail, enter the % amount to ADD (not the total %)

Description	Wholesale %	Addtl %
DHL Express	5.50	2.00
FedEx Express Express	6.00	2.00
FedEx Ground	5.75	2.00
UPS Air	7.25	2.00
UPS Ground	6.25	2.00

Enter the retail rate you wish to charge your customer for this service.

Fuel surcharge wholesale rates are updated automatically each day.

Back Next Cancel Help

Show hints

► 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.

The screenshot shows the 'PostalMate Settings' window with the 'Insurance Settings' tab selected. The left sidebar lists various settings categories, with 'Insurance Settings' highlighted. The main content area is divided into three sections:

- Global rate-setting:** This section includes a step-by-step guide:
 1. Add a % margin or % markup
 2. Check which rate group(s) to apply the above to:
 - ☐ DHL
 - ☐ Endicia
 - ☐ FedEx
 - ☐ Shipsurance
 - ☐ UPS
 - ☐ USPS
 3. ☒ Apply & Save
 4. Repeat steps 1-3 as desired for any set of services
- Advanced rate-setting:** This section has a button labeled 'Set rates individually'.
- Alternate Insurance* setup:** This section includes:
 - Buttons for 'Companies and rate groups' and 'Map services to coverage'.
 - Checkboxes for 'Use Endicia Insurance for USPS' and 'Allocate entire DV to alternate insurer'.
 - A note: '*Replaces carrier-provided coverage; also known as "3rd-party" insurance'

Callouts provide additional context:

- A callout for the Global rate-setting section states: "Global rate-setting is the quickest way to set your insurance retail rates."
- A callout for the Advanced rate-setting section states: "Set rates individually by company and rate group."
- A callout for the Alternate Insurance* setup section states: "Follow any of the TechNotes listed below to learn about setting up alternate insurance."

At the bottom of the window, there are buttons for 'Save', 'Cancel', 'Back', 'Next', 'Close', and 'Help', along with a 'Show hints' checkbox.

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](#).

► Shipping Settings

Automatic Prompts

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

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Automatic Prompts | Service Display | Carrier Packaging | Filtering | Quick Postage | Freight | Other | Confirmation Receipt

These settings determine how information is entered for shipping transactions. You may wish to try different combinations to see what best fits your store's operations.

Data entry style
☒ Pro Ship
☐ Wizard Ship

Pro Ship defaults
☒ Select addresses from database
☒ Add new addresses to database

Enabled auto-prompts
☒ Customer
☒ Ship To
☐ Weight
☒ Packing
☒ Packaging/Dimensions
☒ Filtering
☒ Declared Value
☐ Tracking Number
☐ User Defined

☒ Save ☒ Cancel

☐ Show hints

Having auto-prompts turned on helps avoid mistakes in shipping due to omitted information.

Weight is an example of a prompt you may not need if your scale is attached and PostalMate is reading the weight each time you place an item on your scale.

► 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.

Make sure to make any needed changes for both Generic and Carrier-branded packaging tabs.

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Automatic Prompts | **Service Display** | Carrier Packaging | Filtering | Quick Postage | Freight | Other | Confirmation Receipt

Packaging
☒ Generic ☐ Carrier-branded
 This determines how services display on the Rate Comparison screen. There are six tabs for generic parcels, and six for services with carrier-branded packaging.

Carrier Tabs: FedEx | **Multi-Carrier** | UPS | Post Office | DHL | Additional

Name on tab: Multi-Carrier

☒ Tab active

Click [+] to expand, and [-] to collapse. Drag the tabs to reorder them.

Services to display:

- ☒ DHL
- ☒ FedEx Express
- ☒ FedEx Ground
- ☐ United Parcel Service
- ☒ United States Postal Service

UPS services cannot be combined with other carriers.

☒ Save ☐ Cancel

☐ Show hints

Click the > in front of any of the carrier options to see the list of services.

Note: UPS services need to be set up on tabs where only UPS services will display.

► 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.

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Automatic Prompts Service Display **Carrier Packaging** Filtering Quick Postage Freight Other Confirmation Receipt

Packaging options to show:

- ☒ DHL Box #2 Medium
- ☒ DHL Box #2 Small
- ☒ DHL Box #3 Large
- ☒ DHL Box #3 Small Tri-Tube
- ☒ DHL Box #4 Large Tri-Tube
- ☒ DHL Express Envelope
- ☒ DHL Large Flyer/Pack
- ☐ DHL Large Padded Pouch
- ☐ DHL Small Padded Pouch
- ☐ DHL Standard Flyer/Pack
- ☐ Express Mail® Box
- ☒ Express Mail® Flat Rate Envelope
- ☒ Express Mail® Legal Flat Rate Envelope
- ☒ Express Mail® Padded Flat Rate Envelope
- ☐ Express Mail® Tube
- ☐ Express Mail® Tyvek Envelope
- ☒ FedEx® Envelope
- ☒ FedEx® Extra Large Box
- ☒ FedEx® Large Box
- ☒ FedEx® Medium Box
- ☒ FedEx® Pak
- ☒ FedEx® Small Box

Selected item details:
Express Mail® Flat Rate Envelope (12.5" x 9.5")

You may wish to uncheck choices not offered at your location; this will restrict them from displaying on the Rate Comparison screen.

Save Cancel

Show hints Back Next Close Help

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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Automatic Prompts Service Display Carrier Packaging **Filtering** Quick Postage Freight Other Confirmation Receipt

This will govern how Rate Comparison filtering options are selected by default. All of these can be changed on the fly during shipping transactions.

Default filter by rating option:

- ☒ Show all (don't filter)
- ☐ Show least expensive

Other filtering defaults:

- ☐ Hide N/A services
- ☐ Include USPS services for transit days filter

Save Cancel

Show hints Back Next Close Help

► 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.**

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Quick Postage screen displays

Priority Mail tab: On demand (Shift+Alt+P) Never show Always show On demand (Shift+Alt+P)

Media Mail tab: On demand (Shift+Alt+M)

Important: Priority Mail transactions done on the Quick Postage screen will NOT get Commercial Base or Approved Shipper discounts.

Save Cancel

Back Next Close Help

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

► Shipping Settings continued...

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Freight in PostalMate
☒ Enabled

Default external booking system
Bamboozal Freight
+ Add Edit Delete

Default freight carrier
AES Logistics
+ Add Edit Delete

Default margin for retail
Base shipping: Percent % 50
Add'l services: Percent % 50
Insurance: Percent % 50

Department
Shipping: FedEx
Insurance: FedEx

Default rating mode
☒ Full view (Allows view/edit margin and markup)

Save Cancel

Back Next Close Help

Set the defaults for base shipping, additional services and insurance. These may be overridden at the time of the freight shipment.

Add one or more external booking systems that you use. You can add a URL for quick access when calculating the freight shipment.

Booking system name
Bamboozal Freight Consolidator

URL
bamboozal.com

OK Cancel

Select a default freight carrier.

► 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.

PostalMate Settings - Other tab

Automatic Prompts | Service Display | Carrier Packaging | Filtering | Quick Postage | Freight | Other | Confirmation Receipt

User-defined terms

Package ref: Reference

Packing labor: Pro Pack

Next IDs

Package: 230490 Shipment: 229790

Dimensions

Require dims for services with dim rating

High value shipments

Signature required when over: 999.00

Contents required when over: 199.00

Default search criteria

Customer: Last name

Ship To: Zip code

☐ Filter by customer

Display of additional rates

Position 1: Wholesale for selected service

Position 2: Suggested Retail (when availabl

Position 3: Profit for selected service

Address auto-complete

☒ Enabled

☐ Show hints

Save Cancel

Back Next Close Help

► 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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Automatic Prompts Service Display Carrier Packaging Filtering Quick Postage Freight Other Confirmation Receipt

This optional receipt prints when the shipping label is printed. It contains shipping and packing information, and a signature line for your Customer

Disclaimer or other additional verbiage

TERMS AND LIMITS OF LIABILITY

Text alignment: ☒ Left ☐ Centered

Copies: None

Printer in this workstation: [None]

Print Test

Save Cancel

Back Next Close Help

Show hints

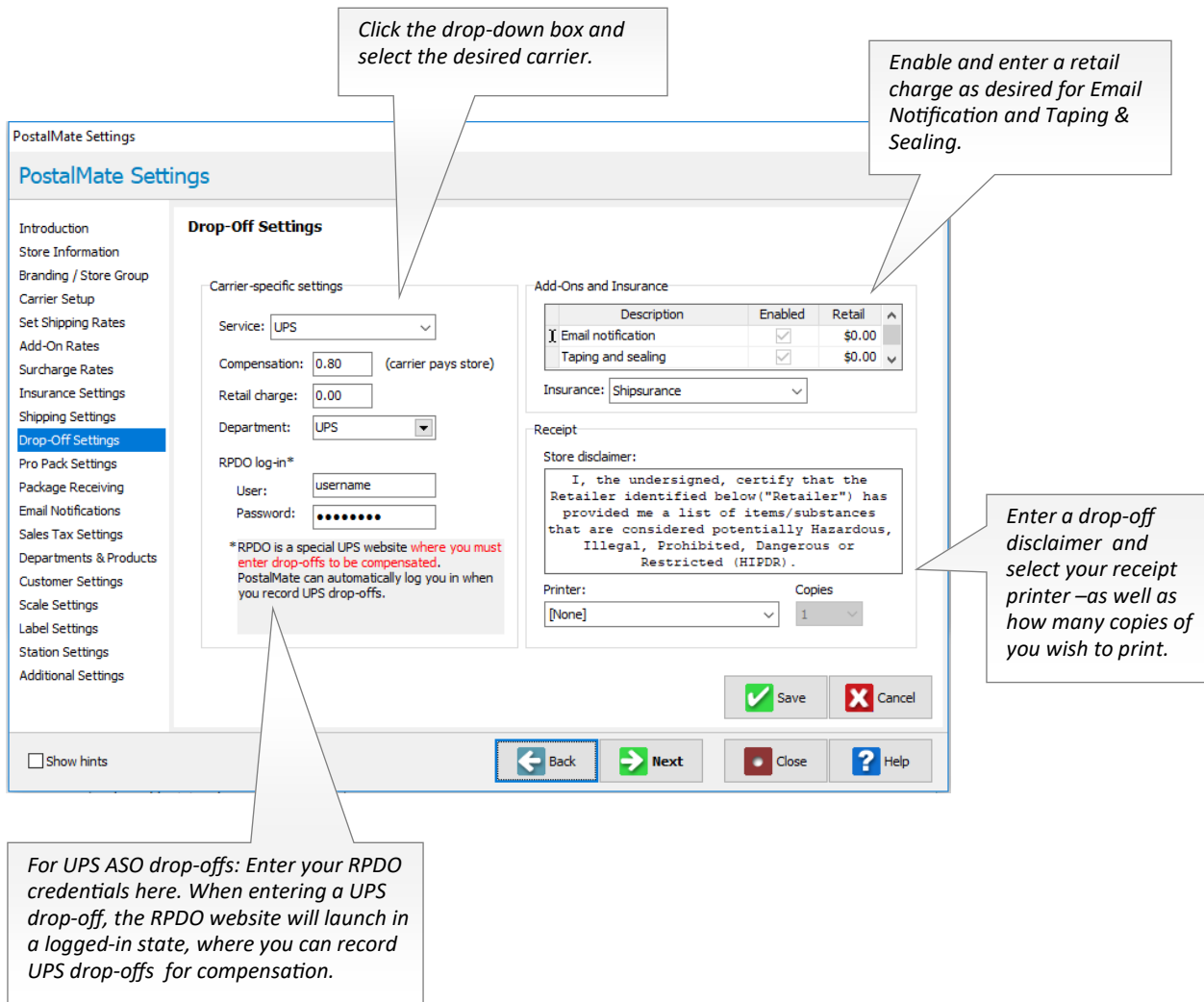
Enter your shipping disclaimer here.

Select how many receipts you wish to print.

The shipping disclaimer will print to your receipt printer (not a label printer).

► 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.



PostalMate Settings

Drop-Off Settings

Carrier-specific settings

Service: *Click the drop-down box and select the desired carrier.*

Compensation: (carrier pays store)

Retail charge:

Department:

RPDO log-in*

User:

Password:

*RPDO is a special UPS website where you must enter drop-offs to be compensated. PostalMate can automatically log you in when you record UPS drop-offs.

Add-Ons and Insurance

Description	Enabled	Retail
Email notification	<input checked="" type="checkbox"/>	\$0.00
Taping and sealing	<input checked="" type="checkbox"/>	\$0.00

Insurance: *Enable and enter a retail charge as desired for Email Notification and Taping & Sealing.*

Receipt

Store disclaimer:

I, the undersigned, certify that the Retailer identified below ("Retailer") has provided me a list of items/substances that are considered potentially Hazardous, Illegal, Prohibited, Dangerous or Restricted (HIPDR).

Printer: Copies: *Enter a drop-off disclaimer and select your receipt printer—as well as how many copies of you wish to print.*

☐ Show hints

For UPS ASO drop-offs: Enter your RPDO credentials here. When entering a UPS drop-off, the RPDO website will launch in a logged-in state, where you can record UPS drop-offs for compensation.

- See Technote titled [Setting up and Recording Drop-Offs](#) for detailed information.

► 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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Additional Settings

General | Fragility | Labor | Materials | Kits | Other

Custom container options

☒ Making boxes ☒ Resizing boxes ☒ Combining boxes ☒ Crating

Pro Pack default mode

☐ Basic ☒ Advanced ☒ Allow switching on the fly

Default process

☐ While customer waits ☒ Pack after customer leaves

Item entry preference

☐ Simple ☒ Filled ☒ Rotate item dimensions automatically

Save

Back Next

☐ Show hints

Select which type of custom container options that your store offers.

While Customer waits = You are packing the shipment now. Pro Pack will tell you which box and packing materials you need. Place the item(s), box and filler on the scale for accurate weight. Pro Pack will calculate the end dimensions for you. The shipping label will print at the end of the shipment.

Pack after customer leaves = You will pack the job after the customer leaves. Pro Pack will choose the packing materials needed and estimate the final weight and dimensions based on the packing materials chosen. A Pro Pack label will print at the time of shipment. Later, after you have packed the job, you will retrieve the Pro Pack estimate, verify and make any needed adjustments and then print the shipping label.

► Setup Pro Pack continued...

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General Fragility Labor Materials Kits Other

Pro pack mode
☐ Basic ☒ Advanced

When doing a packing job, you'll indicate how fragile the item is. This will determine how it will be packed.

Fragility levels:

Description	Cushioning	Default
Non-breakable	0 in.	<input type="checkbox"/>
Semi-fragile	1 in.	<input checked="" type="checkbox"/>
Fragile	2 in.	<input type="checkbox"/>
Very fragile	3 in.	<input type="checkbox"/>
Delicate	4 in.	<input type="checkbox"/>

Description of selected level:
Unbreakable contents, such as clothing, paper items, sports equipment.

Save Cancel

Back Next Close Help

• 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".

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

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General Fragility Labor Materials Kits Other

Default labor rate: \$ 45.00 per hour

Default assembly times:

Configuration	Minutes
Box only	4
Box w/fill	5
Box w/wrap/fill	9
Double box w/wrap/fill	15
Box w/double wrap/fill	20

Activity Minutes

Collar	10
Sandwich	5
Skid	5
Pallet	0
Custom box	15
Modified box	5
Combined boxes	5
Cut down box	8

Minimum charges:

Job Type
Regular box
Skid crate

Save Cancel

Back Next Close Help

☐ Show hints

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.

► 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.

Choose from Fill, Cardboard, Wrap or Liner.

If your scale is attached, use this feature to set the weight for each of your packing materials.

*Use the **Add** or **Edit** buttons to make changes or add new packing materials.*

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General Fragility Labor **Materials** Kits Other

Type
☒ Packing materials ☐ Crating materials

Box
Fill
Cardboard
Wrap
Liner

Set types
Set defaults
Display order

Description	Lbs.	Oz.	Dim1	Dim2	Dim3	Thick	Retail
BOX 10 X 10 X 10	0	12	10	10	10	0.25	\$3.99
BOX 10 X 10 X 5	0	8	10	10	5	0.25	\$2.99
BOX 10 X 8 X 6	0	7	10	8	6	0.25	\$2.99
BOX 12 X 09 X 04	0	8	12	9	4	0.25	\$2.99
BOX 12 X 10 X 6	0	10	12	10	6	0.25	\$2.99
BOX 12 X 12 X 40 LAMP/TALL	2	0	12	12	40	0.5	\$7.99
BOX 12 X 12 X 48	2	0	12	12	48	0.25	\$7.99
BOX 12 X 12 X 12	0	14	12	12	12	0.25	\$4.79
BOX 12 x 12 x 4	1	0	12	12	4	0.25	\$2.99
BOX 14 X 14 X 05	0	0	14	14	5	0.25	\$3.99

+ Add Edit

Save Cancel

Back Next Close Help

Display Order

Sorting mode
☒ Manually
☐ Automatically by volume
☐ Alphanumerically

Material type
Box
Fill
Cardboard
Wrap
Liner

BOX 17 X 11 X 8
BOX 20x20x10
BOX 24 X 9 X 6
BOX 28 X 10 X 10
POLY BAG LARGE
POLY BAG MED
POLY BAG SMALL
POLY BAG XL
BOX - Non-Inventory
BOX 06 X 06 X 06
BOX 10 X 10 X 10
BOX 10 X 10 X 5
BOX 10 X 8 X 6
BOX 12 X 09 X 04
BOX 12 X 10 X 6
BOX 12 X 12 X 40 LAMP/TALL
BOX 12 X 12 X 48
BOX 12 X 12 X 12
BOX 12 x 12 x 4
BOX 14 X 14 X 05
BOX 14 X 14 X 10
BOX 14 X 14 X 48
BOX 14 X14 X 14

You can drag and drop materials into position, or you can select a material and move it up or down using the buttons below.

Move Up
Move Down

By Volume
Alphanumerically

OK Help

Set types allows you to quickly set a box as a box, fill as fill, etc.

Set defaults is used to assign the default product for each material type.

Display order allows you to set the order of how packing materials display (alphanumeric, etc).

► 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.

PostalMate Settings

PostalMate Settings

General Fragility Labor Materials Kits Other

A kit is a pre-defined combination of individual packing materials

Search:

Name	Description
17" Laptop kit	
▶ 15" Laptop Kit	

+ Add
Edit
Delete

Save Cancel

Show hints Back Next Close Help

Add, Edit or Delete Kits here.

PostalMate Settings

PostalMate Settings

General Fragility Labor Materials Kits Other

Fill

Max. cushioning: inches

☒ Force filler for empty space

Picture boxes

Max. space per side: inches

Resizing

Space threshold: inches

Minimum width: inches

Combining

Space threshold: inches

Max. # of boxes:

Container selection criteria

☐ Use least expensive packaging ☒ Use least expensive shipping

Save Cancel

Show hints Back Next Close Help

Additional defaults for fill, resizing and combining can be changed here.

- See TechNote titled [Setting up ProPack](#) for more detailed setup information.

► 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.

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Package Receiving Settings

General FedEx Hold at Location

Package receiving
☒ Enabled

Defaults
☒ Auto-print labels
☒ Mailbox notice labels

Label printer
ZP Zebra Printer

Save Cancel

Show hints Back Next Close Help

See TechNote titled [Package Receiving](#) for more details.

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Package Receiving Settings

General FedEx Hold at Location

FedEx HAL enabled
☒ Enabled

HAL credentials
FedEx Location ID:
FedEx Agent ID:
These IDs are provided to you by FedEx when your store is enrolled in the HAL program.

Daily Scan reminder
☒ Enabled 05:15 PM

Non-HAL packages
☒ External system used after Acceptance process

Save Cancel

Show hints Back Next Close Help

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

► 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.

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Email Notification Settings

From

Store name:
PostalMate Store

Store email: *
support@pcsynergy.com

*This can be different than the email entered in your store information.

These settings are uploaded and stored on PC Synergy servers.

Shipment Delivery Tracking Options Package Receiving

☒ Enabled

Defaults

Send to: Customer ☒ Copy to store ☒ Auto send

Marketing content

Text:
Thank you for shipping with us. Show this email on your next visit and receive \$5.00 off your next FedEx shipment.

Image URL:
Custom Image

☐ Show hints

See TechNote titled [Setting Up Email Notification](#) or [Email Notification Tracking Options](#) for detailed setup instructions.

► 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".

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Sales Tax

Region: State Tax
Category: General Merchandise
Agency: Standard State tax

Advanced...

Tax rates:

Products: 8 %
Labor: 0 %
Shipping: 0 %
☐ Round up at 5

Save Cancel

Back Next Close Help

☐ Show hints

Choose a tax category such as General Merchandise or Non-Taxable.

If you have more tax agencies than provided, use the Advanced button to create more sales tax categories. Use the Help button from the Advanced screen for more specific information.

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

► 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.

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Departments and Products

Departments

Description
Declared Value
DHL
Drop-Off Comm
Fax
FedEx
Finishing
Gifts
Greeting Cards
High Speed Copy
Holiday/Season Promo
Jumbo Shipping

+ Add
Edit
Delete

Products

Description
AHHI - LARM
ALMONDS
ALPHABET STAMP SET
AMAZING SON MAGNET
ANGELS MINI LANYARD
ANIMAL PLANET PUZZLE
ANTIQUE COPPER BANJAR
April Bunny
ARCHITECTURAL STANDAR
AVANTI CARD - PUPPY DOX
AVANTI CARD - SIBLING BL

+ Add
Edit
Delete

Map Products & services to departments

Save Cancel

Back Next Close Help

Add, Edit or Delete Departments here.

Add, Edit or Delete Products here.

Use the Map button to assign departments to shipping services and products.

For detailed setup information, see the following TechNotes:

- [Adding Departments](#)
- [Adding Products](#)
- [Inventory Management](#)
- [Creating Product Barcodes](#)

► 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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- Additional Settings

Customer-related Settings

User-defined customer info fields

Field #1 name: * Customer Card Configure

Field #2 name: * Mailbox # Configure

Field #3 name:

Field #4 name:

*Searchable field; optionally can be set up for card swiping or barcode scanning

Default customer search criteria

Last name ✓

USPS label return address

☒ Use customer address

☐ Use store address

☐ Show hints

Save Cancel Back Next Close Help

Choose the default of how you wish to search for your customers.

There are four "user defined" fields that can contain whatever information you care to enter for marketing or other purposes. These can be re-named as needed. Field 1 and Field 2 can be used to search for customers in your database.

If your customers have a type of ID card (or key fob) that has a unique personal ID encoded in a mag stripe or bar code; you can configure PostalMate/POS to locate the customers in your database by swiping or scanning the cards.

► 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.

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Scale Settings

Model and connection:

Scale model: None

Connected to port: Detecto AS-3500
Mettler-Toledo 8213
Mettler-Toledo PS6L
Mettler-Toledo PS60

To test, place an object on the scale. When correct the weight should appear below.

0 LB 0.00 OZ

Select your scale model and port from the drop-down list.

✓ Save X Cancel

☐ Show hints

← Back → Next

● Close ? Help

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

► 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.

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Label Printers and Settings

Description	Label Size	Printer Name	Qty
DHL Shipper	4 X 6	ZP Zebra Printer	1
FedEx Shipper	4 X 6	ZP Zebra Printer	1
FedEx Ground Shipper	4 X 6	ZP Zebra Printer	1
Generic Shipper	4 X 6	ZP Zebra Printer	1
Ship Info	4 X 6	ZP Zebra Printer	0
Packing	4 X 6	ZP Zebra Printer	1
Auction Estimate	4 X 6	Not assigned	0
Multi-package ID	2 X 2.25	Not assigned	0
USPS	2 X 2.25	Not assigned	0
Customer Copy	2 X 2.25	Not assigned	0
Store Copy	2 X 2.25	Not assigned	0
SelfServe	4 X 6	Not assigned	0
Product Bar Code	0.75 X 1.2	ZP Zebra Printer	1
LSO Shipper	4 X 6	Not assigned	0
USPS Shipper	4 X 6	ZP Zebra Printer	1

Test printer assignment for selected label

Sample of selected label:

Back

Next

Close

Use the Test button to test any assigned label.

Make sure to scroll to the bottom of the list and assign all necessary label options.

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.

► 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 Settings

PostalMate Settings

Introduction
Store Information
Branding / Store Group
Carrier Setup
Set Shipping Rates
Add-On Rates
Surcharge Rates
Insurance Settings
Shipping Settings
Drop-Off Settings
Pro Pack Settings
Package Receiving
Email Notifications
Sales Tax Settings
Departments & Products
Customer Settings
Scale Settings
Label Settings
Station Settings
Additional Settings

Workstation Settings

Internet shipping activities

- ☒ DHL online shipping enabled
- ☒ FedEx online shipping enabled
- ☒ LSO online shipping enabled
- ☒ UPS web services enabled
- ☒ OnTrac web services enabled
- ☒ Online commit updates enabled

Background color

Silver

Default report printer

Micron PPS Document Writer

Shipments to CashMate POS Register:

- ☒ Automatically to this station
- ☐ No station (POS not used)
- ☐ CashMate POS not used on this station

Size of transaction screens

Dynamic scaling (largest)

Current monitor resolution: 1680 x 1050

Callout boxes:

- You may select a background color to frame your screen.*
- If using the CashMate POS, "Automatically to this station" is the most common option. This allows shipments to be carried over from PostalMate to the POS register screen on this station. The "CashMate POS not used on this station" option places shipments on hold automatically so they can be retrieved on another workstation. Choose "No station" if you choose not to use the POS.*
- "Scale up" your PostalMate transaction screens by selecting an option from the drop-down arrow. (Available options are dependent on your installed video card and monitor capabilities.)*

Save Back Next Close

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.

► 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.*

The screenshot shows the 'PostalMate POS Register' window. It includes a menu bar (File, Edit, Reports, Tools, Help), a store information section, a shipment details section, a total display showing '\$15.11', and a large grid of function keys. Callouts provide additional context:

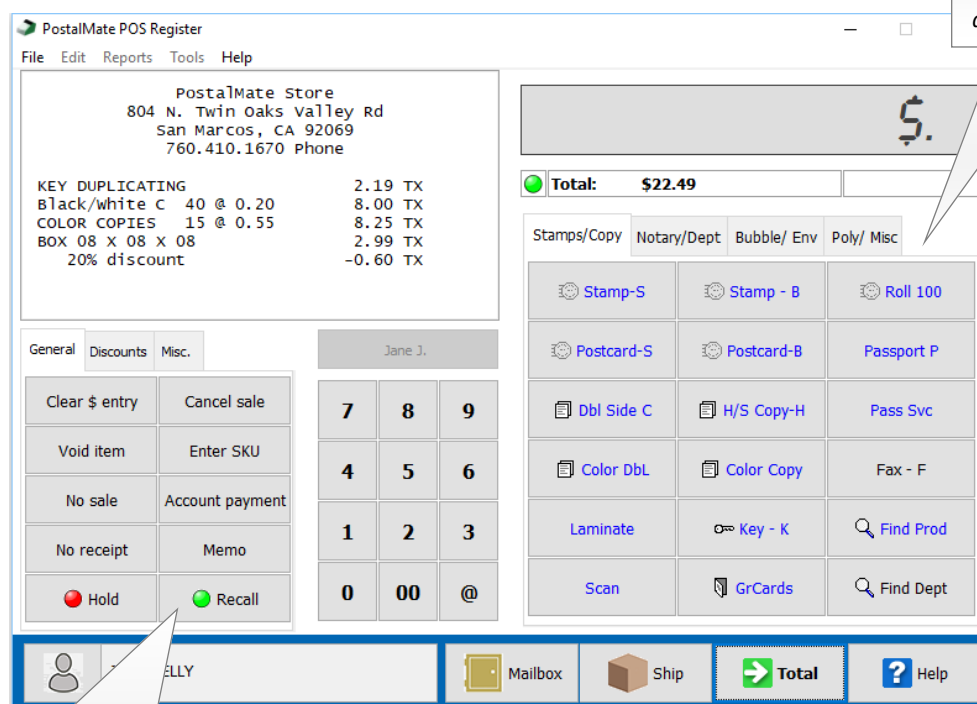
- Function Keys:** Tabs can be renamed by you to match how you sort functions.
- The virtual receipt screen is where all items being sold will appear. For long transactions, use this button to expand the receipt screen to see more transactions.**
- You can customize your tab names.**
- Optional: Set up a user log-on so employees will be tied to register transactions.**
- Access the Mailbox Manager here.**
- Return to the PostalMate shipping screen here.**

*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.*

► 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.



Use the “Hold” button to place a transaction on hold.

Use the “Recall” button to retrieve a held transaction.

Split a transaction: If you need to separate a shipment or item from a specific transaction—place the item on Hold and then choose Recall. Highlight the transaction and use the “Split” button to separate the items in the transaction.

► 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.)

Use the tender buttons or type in the amount paid here.

Register Total

Register Total: \$22.49

Enter amount paid

22.49

7 8 9
4 5 6
1 2 3
0 00

Clear

\$ \$5 \$10 \$20 \$50 \$100

Credit Card

GiftCert

ACCOUNT

Totals

Subtotal:	\$20.83
Sales Tax:	\$1.66
TOTAL DUE:	\$22.49
Amount Paid:	\$0.00
Remainder Due:	\$22.49
Change:	\$0.00

Tender buttons can be moved or replaced to meet your store needs. See page 60 for more information.

See page 67 for information on setting up credit or debit accounts.

JOHN KELLY

✓ Finish X Cancel ? Help

Receipt Options

Receipt Options

How would you like the receipt?

☐ Emailed ☒ Printed

Email address: support@pcsynergy.com

Format

☒ Standard ☐ Invoice, 8-1/2 x 11

Enable emailed receipts (see page 61) and you'll have the option to print a receipt, email a receipt, or both. Uncheck both options for a “no receipt” option.

✓ OK ? Help

► 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**.

Close Register Day

Register station to close/view: Master Workstation -- Opened 4/4/2018 11:42:08 AM

Current status: **OPEN**

Master Workstation

Enter amounts counted in drawer:

Tender	Expected	Counted
American Express	237.61	237.61
Cash	22.49	0.00
Check	15.07	15.07
MasterCard	23.00	0.00
Visa	268.74	0.00

☐ Show all tender types

Summary:

- + Gross sales: 547.65
- + HASH sales: 0.00
- + Sales tax: 19.26
- + Credit acct payments: 0.00
- + Debit acct deposits: 0.00
- + Register deposits: 0.00
- Credit acct charges: 0.00
- Debit acct sales: 0.00
- Paid out: 0.00
- = Net receipts: 566.91
- + Cash at open: 0.00
- = Expected in drawer: **566.91**
- Counted in drawer: **252.68**
- Shortage: **-314.23**

Buttons: X-Report, Close Day, Deposit Slip, Clear, Exit, Help

Callouts:

- The register you are currently closing and when it was opened.
- Use the sigma button to check off counted items for that tender.
- Prints an x-report—before the register day is closed.
- Closes the day. You will have an option to print the x-report when closing the day.
- Opens the cash drawer.
- A list of tender types recorded throughout the day as well as the amounts per type.
- If you have entered check numbers, use the Deposit slip button to print out your check listing.

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”.

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.

Register Settings

Register Buttons | Receipt Settings | Receipt Layout | Credit Card | Pole Display | Tendering | QuickBooks | Quotes | Other

Register Screen Buttons

Buttons to assign

- ☒ Departments & Products
- ☐ Cash register functions
- ☐ Tender types

Departments & Products

Stamps/Copy | Notary/Dept | Bubble/ Env | Poly/ Misc

Stamp-S	Stamp - B	Roll 100
Postcard-S	Postcard-B	Passport P
Dbl Side C	H/S Copy-H	Pass Svc
Color DbL	Color Copy	Fax - F
Laminate	Key - K	Reserved
Scan	GrCards	Reserved

Name on tab
Stamps/Copy

Click on any button that you wish to set up or change.

Shortcut keys

OK Cancel ?

Four tabs are available to assign products and departments to. Name each tab as desired to fit your store needs.

Looking for a “No Receipt” button? Or maybe you don’t accept all credit cards in your store. Here is where you will make these changes.

Assign keyboard shortcuts to items you use often. Shortcut keys are available for Departments & Products, functions and tender types.

► 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.

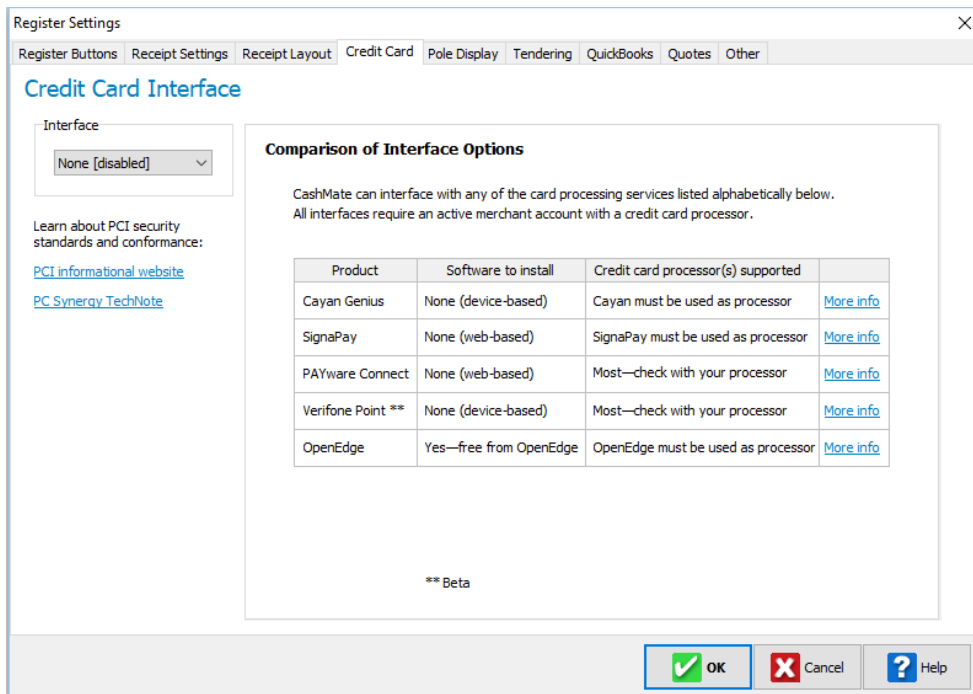
Emailed Receipts: You can point to .jpg or .png file to include your store logo on an emailed receipt.

► 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.



Register Settings

Register Buttons Receipt Settings Receipt Layout Credit Card Pole Display Tendering QuickBooks Quotes Other

Credit Card Interface

Interface

None [disabled] ▼

Learn about PCI security standards and conformance:
[PCI informational website](#)
[PC Synergy TechNote](#)

Comparison of Interface Options

CashMate can interface with any of the card processing services listed alphabetically below. All interfaces require an active merchant account with a credit card processor.

Product	Software to install	Credit card processor(s) supported	
Cayan Genius	None (device-based)	Cayan must be used as processor	More info
SignaPay	None (web-based)	SignaPay must be used as processor	More info
PAYware Connect	None (web-based)	Most—check with your processor	More info
Verifone Point **	None (device-based)	Most—check with your processor	More info
OpenEdge	Yes—free from OpenEdge	OpenEdge must be used as processor	More info

** Beta

OK Cancel Help

► 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.

After your pole display has been successfully installed in Windows, choose "Enabled".

Select the pole display driver from the drop-down list.

Enter the text you wish to display when a transaction is not in progress.

The screenshot shows the 'Register Settings' window with the 'Pole Display' tab selected. The 'Pole Display Settings' section includes a 'Pole display' checkbox (checked), an 'Assigned pole display device' dropdown (set to '[None]'), a 'Pause' dropdown (set to 'None'), and a 'Default display' section with two lines of text input. The 'Default display' section also includes a 'Test' button and a note: 'This is the static display when a CashMate transaction is not in progress.' The bottom of the window has 'OK', 'Cancel', and 'Help' buttons.

► 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.

Register Settings

Register Buttons | Receipt Settings | Receipt Layout | Credit Card | Pole Display | **Tendering** | QuickBooks | Quotes | Other

Tendering

Editable tender types

Full name: Card 1	Button name: Card 1	<input type="checkbox"/> Prompt for #
Full name: Card 2	Button name: Card 2	<input type="checkbox"/> Prompt for #
Full name: Gift Certificate	Button name: GiftCert	<input type="checkbox"/> Prompt for #

Cash drawer opens for

☐ Checks ☐ Account charges ☐ Credit cards

Checks

☒ Prompt for #

OK Cancel Help

Your cash drawer (if attached) will automatically open for cash transactions. Select here if you wish the cash drawer to open for Checks, Account Charges and/or credit cards.

If you want to record the check number when accepting checks, check this box.

► Setup QuickBooks Online

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

Register Settings

QuickBooks Settings

QuickBooks Interface: Online

Default Company: PCS Test Shipping Store

Posting: ☒ Post automatically after close, Journal prefix: PM, ☒ Consolidate

Mapping: Drag each Department, Tender or Tax ... into the desired QuickBooks account

Department: Address Labels, Color Copy, Crating, Desktop Publishing, DHL, Fax, FedEx, FedEx Ground Com, Finishing, FLORAL

QuickBooks account: 50 - Bind/Laminating, 60 - Business Cards, 58 - Color Copies, 84 - Computer Rental, 59 - Copies

Hold the Ctrl or Shift key down to select more than one at a time

To undo, drag from right to left

Map vendor, Unmap Vendor

OK, Cancel, Help

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 POS register.

Register Settings

Price Quotes

Shipping/Pro Pack quotes: ☒ Enabled in PostalMate

Printed document: Title terminology: Estimate, ☒ Auto-print quote

Disclaimer/other information: Our store is pleased to offer this estimate based on the information supplied. Pricing may change if the number of pieces/items, weight, dimensions, and/or destination are different from those provided. We will notify you of any changes prior to job completion. This estimate is not a contract or an invoice.

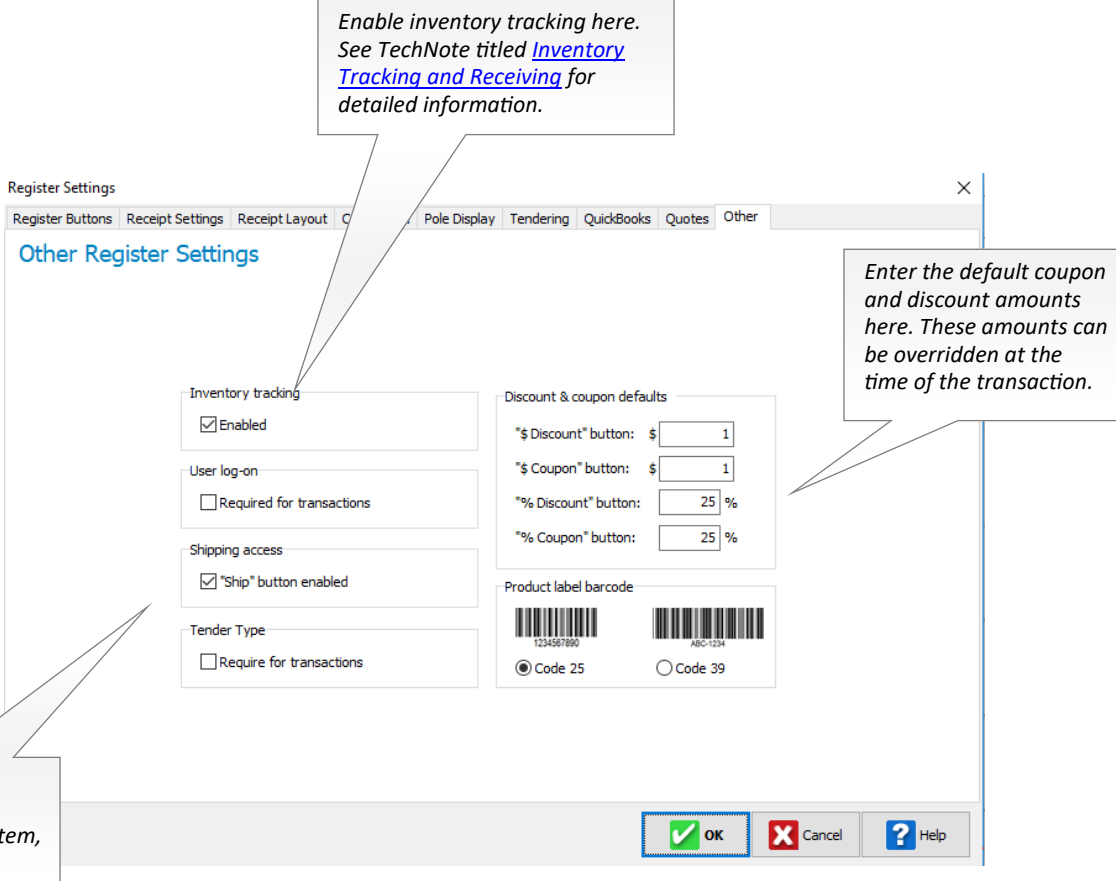
Expiration information: This estimate is valid for 30 days.

OK, Cancel, Help

See TechNote titled [Printable Price Quotes](#) for more detailed setup and how to use information.

► 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.



Register Settings

Register Buttons | Receipt Settings | Receipt Layout | C | Pole Display | Tendering | QuickBooks | Quotes | Other

Other Register Settings



Inventory tracking
☒ Enabled

User log-on
☐ Required for transactions

Shipping access
☒ "Ship" button enabled

Tender Type
☐ Require for transactions

Discount & coupon defaults
 "\$ Discount" button: \$
 "\$ Coupon" button: \$
 "% Discount" button: %
 "% Coupon" button: %

Product label barcode
 
☒ Code 25 ☐ Code 39

Callouts:

- Enable inventory tracking here. See TechNote titled [Inventory Tracking and Receiving](#) for detailed information.
- Enter the default coupon and discount amounts here. These amounts can be overridden at the time of the transaction.
- If you would like to disable access to shipping for this system, do so here.

OK Cancel Help

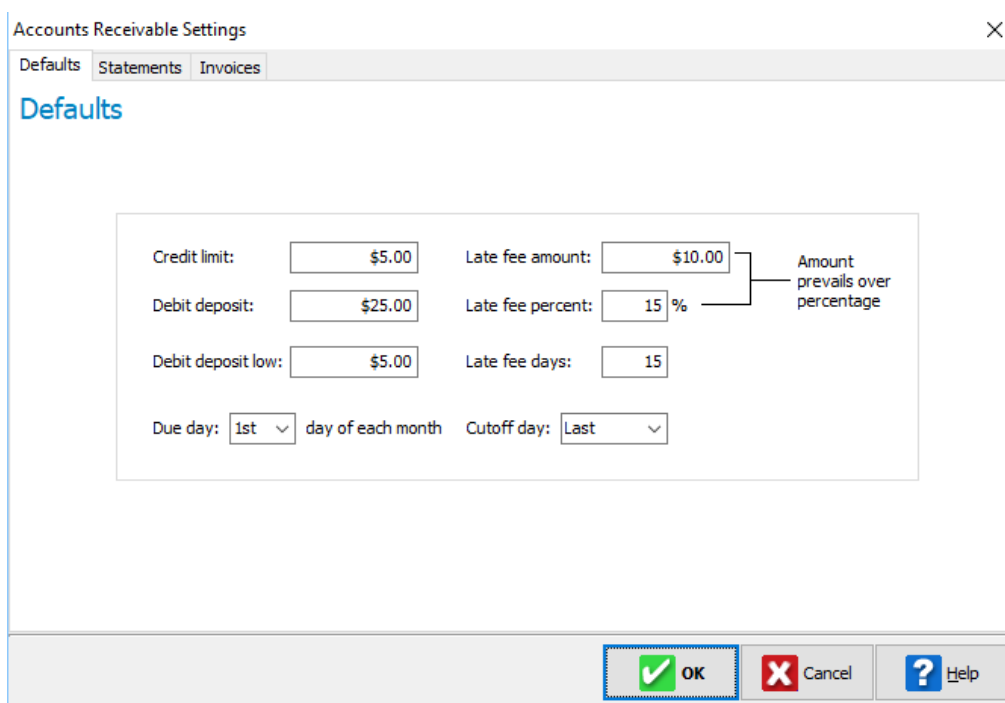
For more POS discounting options, go to **Tools > Options > Discounts and Special Pricing**. See TechNote titled [Discounts and Special Pricing](#) for more details.

► 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.



The image shows a screenshot of the 'Accounts Receivable Settings' dialog box. The 'Defaults' tab is selected. The dialog has a title bar with 'Accounts Receivable Settings' and a close button (X). Below the title bar are three tabs: 'Defaults', 'Statements', and 'Invoices'. The 'Defaults' tab is active and shows the following settings:

Credit limit:	<input type="text" value="\$5.00"/>	Late fee amount:	<input type="text" value="\$10.00"/>	Amount prevails over percentage
Debit deposit:	<input type="text" value="\$25.00"/>	Late fee percent:	<input type="text" value="15 %"/>	
Debit deposit low:	<input type="text" value="\$5.00"/>	Late fee days:	<input type="text" value="15"/>	
Due day:	<input type="text" value="1st"/> day of each month	Cutoff day:	<input type="text" value="Last"/>	

At the bottom of the dialog are three buttons: 'OK' (with a green checkmark icon), 'Cancel' (with a red X icon), and 'Help' (with a blue question mark icon).

► 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](#)

► 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.](#))

Mailbox Manager

File Edit Reports Tools

Mailbox Manager

Open New [Create a new mailbox account]

Renew Existing [Accept payment for next term]

Forward Mail [Create forwarding transaction]

Find Mailbox [For other transactions or information]

Close **Help**

See TechNote titled [Mailbox Manager Setup](#) for detailed setup.

From Mailbox Manager, choose [Tools > Settings](#).

Mailbox Manager Settings

Sizes & Rates

Service Options

Mail Notifications

Digital Delivery

Deposits & Fees

Mailbox Inventory

Renewal Notices

Service Agreement

Other

Sizes and Rates

Sizes/Types:

Enabled	Description	1 Month	3 Months	6 Months	12 Months
		Rate	Rate/mo. Term	Rate/mo. Term	Rate/mo. Term
<input checked="" type="checkbox"/>	Personal	\$16.00	\$15.00 \$45.00	\$15.00 \$90.00	\$14.00 \$168.00
<input checked="" type="checkbox"/>	Business	\$21.00	\$20.00 \$60.00	\$20.00 \$120.00	\$18.00 \$216.00
<input checked="" type="checkbox"/>	Corporate	\$23.00	\$22.00 \$66.00	\$22.00 \$132.00	\$21.00 \$252.00
<input checked="" type="checkbox"/>	Virtual	\$18.00	\$16.00 \$48.00	\$16.00 \$96.00	\$15.00 \$180.00

Department (required): Mailbox Services

OK **Cancel** **Help**

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

► 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

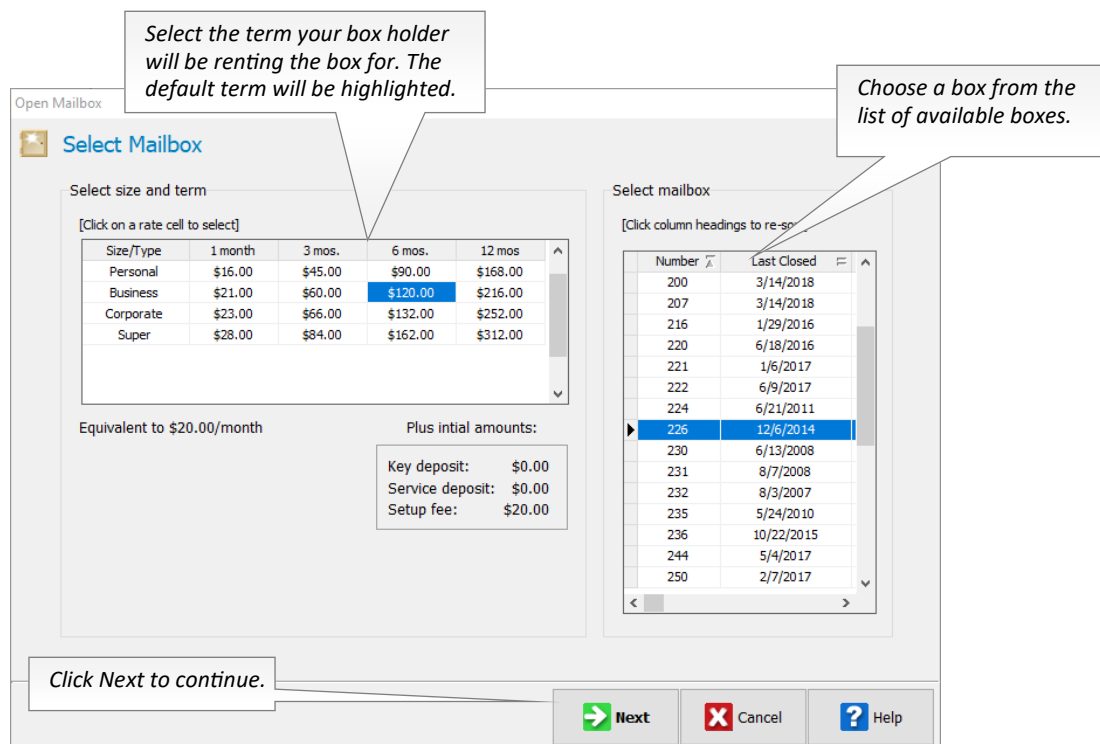
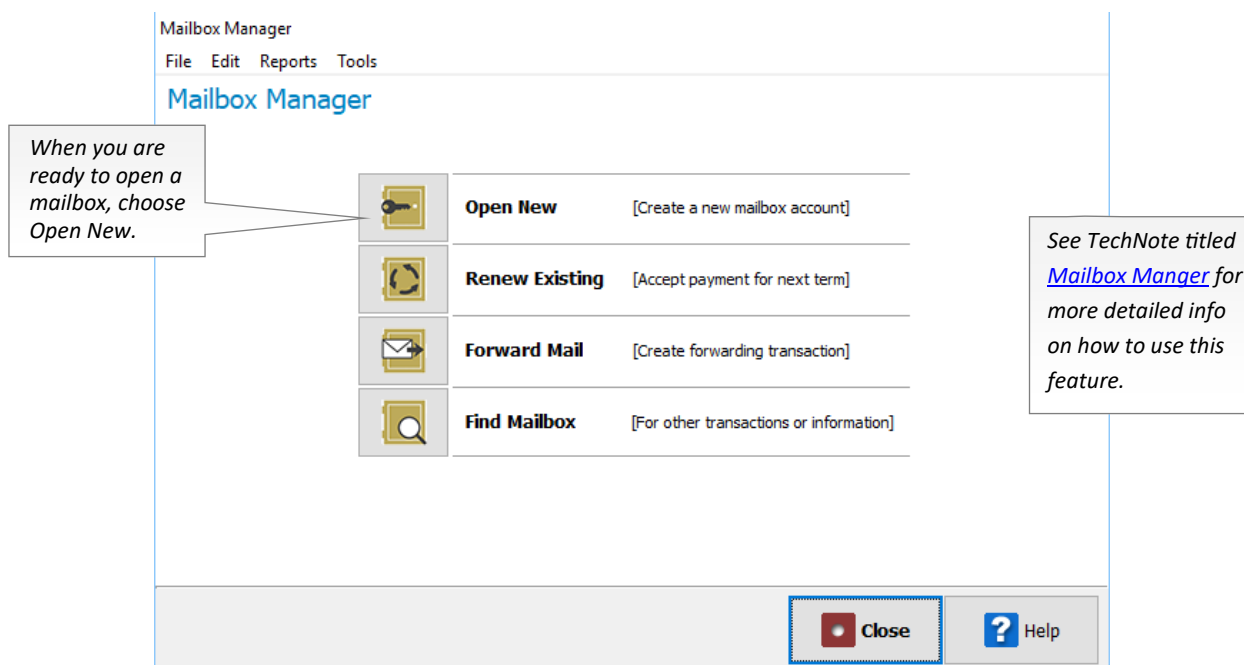
- There is a tab for each notice type.
- Enter the title of each notice as well as the text you would like on the notice. Also enter when you would like to print the notices.
- Email delivery is available for Mailbox notices. To set up email notices for existing mailboxes, choose "Setup for mailboxes".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

► 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.



► Opening a Mailbox continued...

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

Open Mailbox

Options & Charges: Business, 3-Month Term

Box # 230

Service rates	Month	Term
Basic service:	\$20.00	\$60.00
<input checked="" type="checkbox"/> 2 Additional Mailnames	\$3.00	\$9.00
<input checked="" type="checkbox"/> 24 Hour Service	\$5.00	\$15.00
<input type="checkbox"/> 4 Additional Mailnames	\$5.00	\$0.00
<input checked="" type="checkbox"/> Mail/package notification	\$0.00	\$0.00

Cycle and initial term

Due day: Exact full term

From: 4/ 6/2018

To: 7/5/2018

[Exact Full term]

Prorate: ☐

Free additional months: 2

Next due date: 9/5/2018

Deposits and fees

Setup fee: \$20.00

Service deposit: \$0.00

Deposit for 1 key(s): \$0.00

Charges per term: \$84.00

Proration this term: 0.00

Deposits/fees: \$20.00

Initial amount: \$104.00

[Sales tax not included]

Click Next to continue.

Back Next Cancel Help

- 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.

Open Mailbox

Boxholder Information

Box # 230

Primary boxholder (required)

SALLY SMITH

I.D. #1 Type: Drivers license Number/Ref: 123456789 CA DL

I.D. #2 Type: Vehicle insurance policy Number/Ref: 987654321 AAA Ins.

Two forms of ID are required by the USPS; one must be a photo I.D. Social Security cards, credit cards and birth certificates are unacceptable.

Renewal Notice delivery

Print & Email to: sallysmith@myemail.com

Mailnames

Mail will be accepted for:

SMITH, SALLY

+ Add Edit Delete

[Maximum allowed: 5]

Notes

[User-defined]

Prepare 1583 Form(s)

Choose how you wish to send mailbox renewal notifications: Print, Email or both.

Prepare 1583 forms for each mail name.

Click Finish and return to the POS register screen to total the sale.

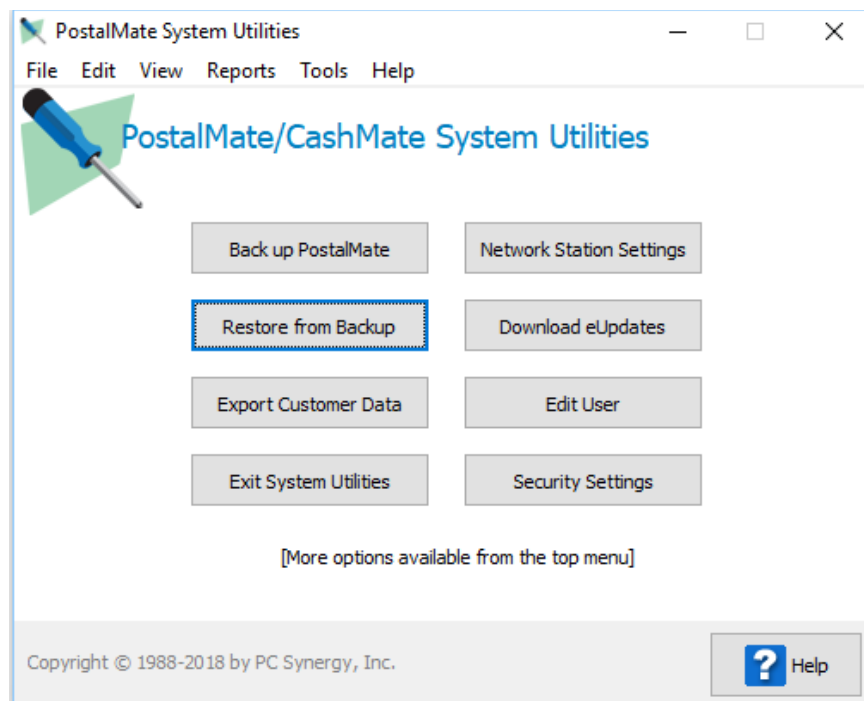
Back Next Cancel

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

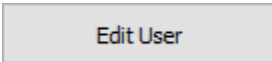
Below is a list of most common features in PostalMate Utilities. Use the TechNote associated with each topic to get more detailed information on the feature.

- [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](#)



► 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.

Add User

ID:

General

First name: Phone:

Last name: SS #:

Added: 4/4/2018 ☒ Time Clock User ☐ Hide

Security/Log-on

Password: Enter again:

If using the Time Clock and this user will be punching in, make sure this box is checked.

Passwords are optional for Time Clock, and are required if you plan on setting up security.

Fingerprint readers are a secure method of logging into PostalMate, CashMate and the Time Clock. See TechNote titled [Fingerprint Reader](#) for details.

► 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.

System-Wide Security Settings

Security Settings and Log-On Settings

General Security | **Log-on Settings** | Event Log | PCS Website Log-on

Security log-on

Shipping and POS: ☒ Fingerprint reader* ☐ Name ☒ Password required*

Time Clock: ☒ Fingerprint reader* ☐ Name ☒ Password required*

Secure Areas: ☒ Fingerprint reader* ☐ Name and password

* If reader is not installed and working, log-on will default to name (and password if checked)

Mandatory Log-ons

☒ Shipping and mailing

☒ CashMate transactions

☒ Credit card transactions

Auto log-off after CashMate transaction

Auto log-off immediately ▼

OK Cancel Help

Log-on options for just a name, a name and a password, or a fingerprint reader (if installed).

Check "Shipping and mailing" if you wish to have users log-on to PostalMate. Check "POS transactions" if you wish to have users log-on in the POS.

For the POS, choose if you want the user to be logged off immediately after each transaction, stay logged on until logged off, or set a timer for the program to auto log-off.

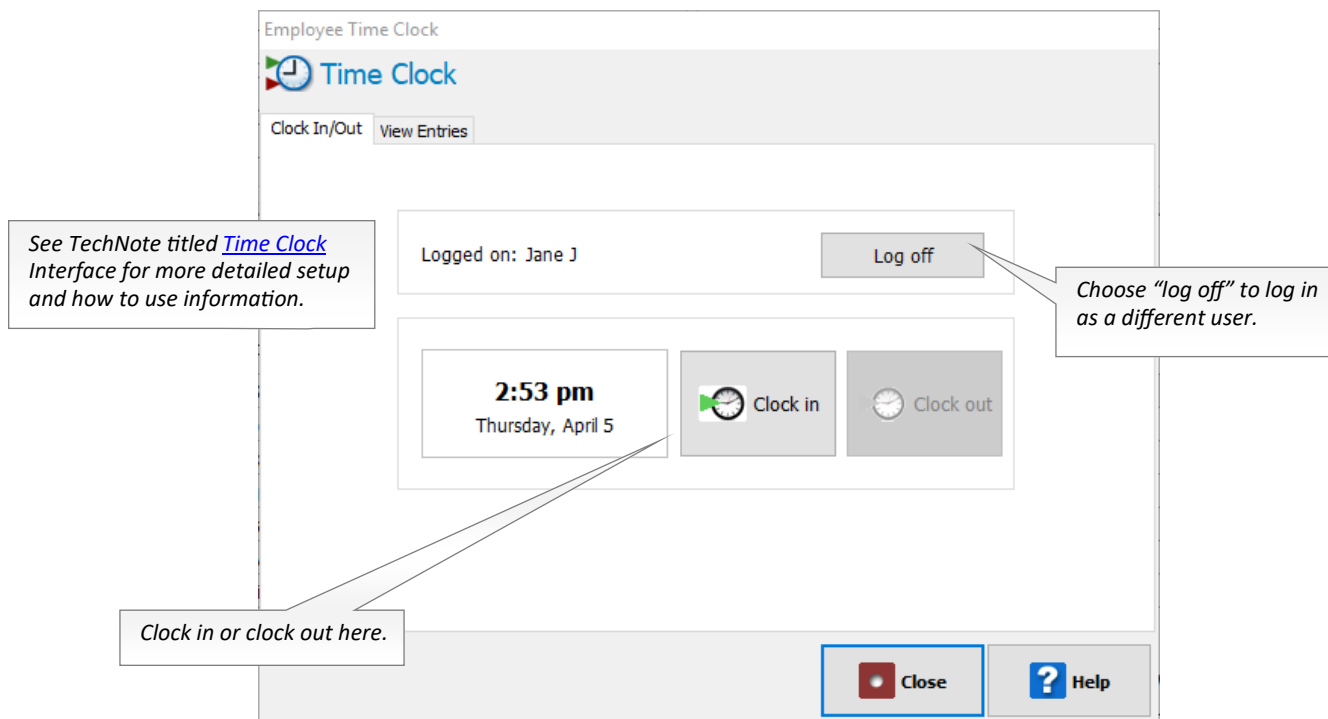
A full-feature Time Clock is integrated with PostalMate, to assist you in keeping track of employees hours. It utilizes the existing User database in PostalMate, which is also used for Security and PostalMate and CashMate log-ons.

► 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.



► 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.

Employee Time Clock



 Time Clock

Clock In/Out View Entries

Employee: All From: 3/ 5/2018 To: 3/ 9/2018 Type: All

First	Last	Clock In	Clock Out	Status
Suzie	S	3/9/2018 1:52:04 PM	3/9/2018 6:07:38 PM	
Lisa	M	3/9/2018 1:34:29 PM	3/9/2018 1:55:34 PM	
Mike	M	3/9/2018 1:32:21 PM	3/9/2018 6:12:31 PM	
Kim	K	3/9/2018 12:12:32 PM	3/9/2018 1:51:26 PM	
Kim	K	3/9/2018 9:04:32 AM	3/9/2018 11:50:21 AM	
Lisa	M	3/9/2018 8:40:41 AM	3/9/2018 1:03:50 PM	
Lisa	M	3/8/2018 3:21:46 PM	3/8/2018 3:30:30 PM	
Jason	Jones	3/8/2018 3:15:41 PM	3/8/2018 4:57:32 PM	
Suzie	S	3/8/2018 1:50:31 PM	3/8/2018 4:21:26 PM	

Edit Add Void Report Total hours: N/A

  Help

Choose a single employee or all employees to view. Select a date range.

Edit, Add or Void options are only available to users setup with security access to the Time Clock.

Print an attendance report for a single employee or all employees by date range here. Report capability is only available to users set up with security access to Reports.

► 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.

► Notes

[illegible]

