

Make sure your new system meets the minimum Hardware Requirements. Follow these steps to assist you in transitioning PostalMate to your new computer:

What you'll need

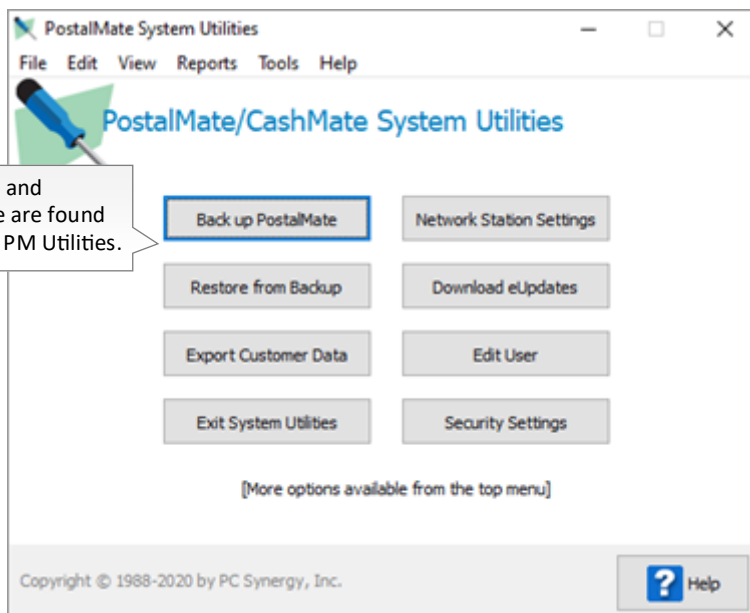
- **PostalMate Serial Number:** Find this in PostalMate on your current computer under **Help > About**.
- **PostalMate Install:** Download PostalMate from www.pcsynergy.com. Once logged in, choose **PostalMate > Downloads**. The current PostalMate version is available by clicking the Download button. If you need a prior version, click on the link for **Previous new install versions**. Choose the **Download** button to download the current version, or click on the version number on the right to download the version that your current backup is on. (In PostalMate, click on **Help > About** to see your PostalMate version.)
- **PostalMate Backup:** Save a copy of your most recent backup to a flash drive, cloud storage, or other alternate method to bring over to the new computer.
- **Printer Drivers:** Install the latest drivers for your specific report printer, 4x6 label printer, Dymo printer and receipt printer.
- **Credit card Interface credentials:** if you use an integrated credit card interface with CashMate, you will need to re-enter and reauthenticate your usernames and passwords on the new computer. This information cannot be restored with a backup for security reasons.



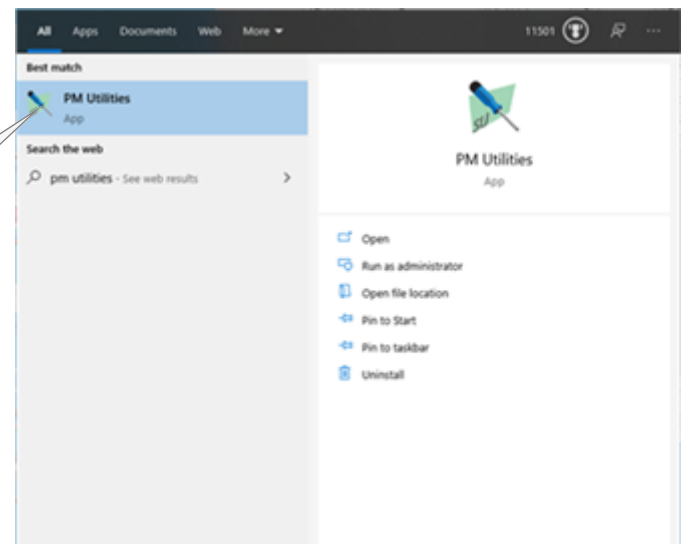
The screenshot shows the 'Downloads' page for PostalMate. At the top, there's a header with the PostalMate logo and navigation links for 'PostalMate®', 'PostalMate® Flex', and 'Hi Colette'. The main heading is 'Downloads'. Below it, the 'PostalMate' section says 'Get the latest version of PostalMate'. Under 'New Install', it lists 'PostalMate version 11.9.3', 'Latest Version', 'Release date: 03/19/2020', and 'File size: 219 MB'. A blue 'Download' button is prominent. Below this are links for 'Getting Started guide' and 'Previous new install versions'. To the right, 'Important Notes' are listed. A callout box on the left points to the 'Download' button, stating: 'We recommend you keep your PostalMate software updated to the current version (especially prior to moving it over to a new computer). This makes it easier to match up the backup version and the download version.' Another callout box at the bottom points to the 'Previous new install versions' link, stating: 'Click on this link if you need to install a previous version.'


Steps

1. Backup your existing system to an external medium that is readable by the new computer such as a flash Drive, external hard drive, network drive, or cloud backup system.
2. Install PostalMate to your new computer.
3. Attach your scale, printers, scanner and other hardware to the new computer. The easiest way to do this is to remove each piece of hardware (one at a time) and attach to the new computer. This way you can see where it came from and get a better idea of where it should go.
4. Use **PostalMate Utilities** to restore your backup. Choose **Restore from Backup** and follow the onscreen instructions to complete the restore.



Backup and Restore are found here in PM Utilities.



If you don't see the PM Utilities shortcut, choose **Windows Start**  > **PostalMate** > **PM Utilities**.

PostalMate Settings

The following settings should be done on any new install of a Standalone, Master, or Auxiliary station.

4x6 Label Printer

1. For PostalMate printing, install the printer driver for your specified printer (i.e. Zebra LP 2844, Zebra ZP450). In some cases, if a specific label doesn't print correctly, we suggest using a Zebra Seagull driver, which will work for all label printing functions in PostalMate. You can locate current drivers by logging into <https://pcsynergy.com/downloads>. Scroll down and click on **View printer drivers**.

Printer Drivers

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Label printers

- [Zebra Technologies Website](#)
- [Seagull Zebra Drivers](#)
- [UPS CTP 450 Driver](#)
- [FedEx 500/505 Driver](#)

Receipt printers

- [Citizen Drivers](#)

DYMO printers

- [LabelWriter Print Driver \(32 bit\)](#)
- [LabelWriter Print Driver \(64 bit\)](#)
- [DYMO® Label Software v8.5.1, Windows](#)

Note: For ZPL only label printers, the printer driver must include "ZP" or "ZPL" in the printer driver name in order for PostalMate to print to the ZPL printer.

- Assign your printer driver in PostalMate by selecting **Tools > PostalMate Settings** and select **Label Settings** on the left pane. Use the drop down arrow to select the printer driver you installed for each label option you wish to print.
 - If PostalMate was open while the printer drivers were being installed, you may need to exit out of PostalMate and re-open to assign in **Label Settings**.
 - Choose **Test printer assignment for selected label** as needed to test label printing.

PostalMate Settings

PostalMate Settings

Introduction

Store Information

Branding / Store Group

Carrier Setup

Set Shipping Rates

Add-On Rates

Surcharge Rates

Insurance Settings

Shipping Settings

Freight 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

Label Printers and Settings

Description	Label Size	Printer Name	Qty
DHL Shipper	4 X 6	ZP Zebra GK420d	1
FedEx Shipper	4 X 6	ZP Zebra GK420d	1
FedEx Ground Shipper	4 X 6	ZP Zebra GK420d	1
Generic Shipper	4 X 6	Send To OneNote 2016	1
Ship Info	4 X 6	OneNote	1
Packing	4 X 6	Microsoft XPS Document	1
Auction Estimate	4 X 6	Microsoft Print to PDF	0
Multi-package ID	2 X 2.25	Fax	0
USPS	2 X 2.25	CITIZEN CT-S310II	0
Customer Copy	2 X 2.25	Adobe PDF	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	Not assigned	0
LSO Shipper	4 X 6	Not assigned	0
USPS Shipper	4 X 6	ZP Zebra GK420d	1

Test printer assignment for selected label

Sample Label:

☐ Show hints

Back

Next

Close

Help

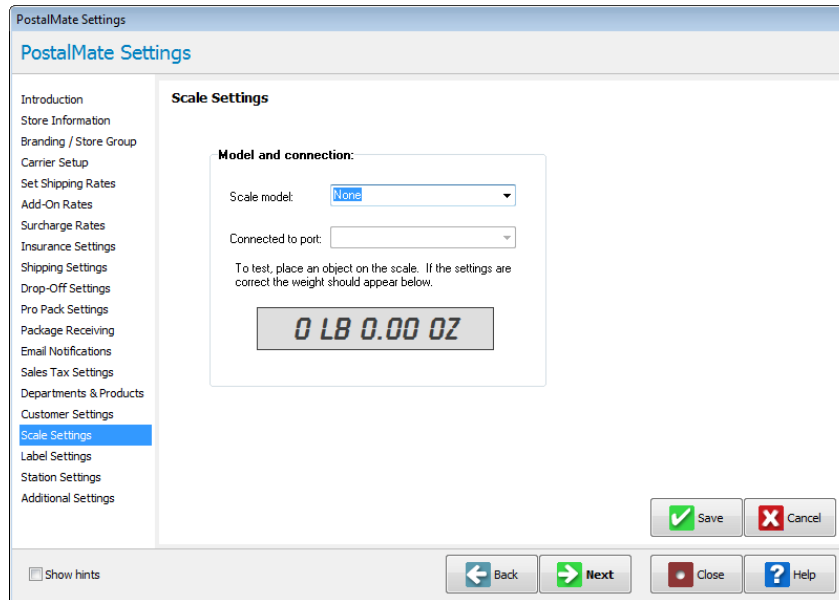
Use the drop down arrow next to the **Printer Name** to re-assign the printer.

Be sure to scroll to the bottom of the list to assign all label options.

Scale Settings

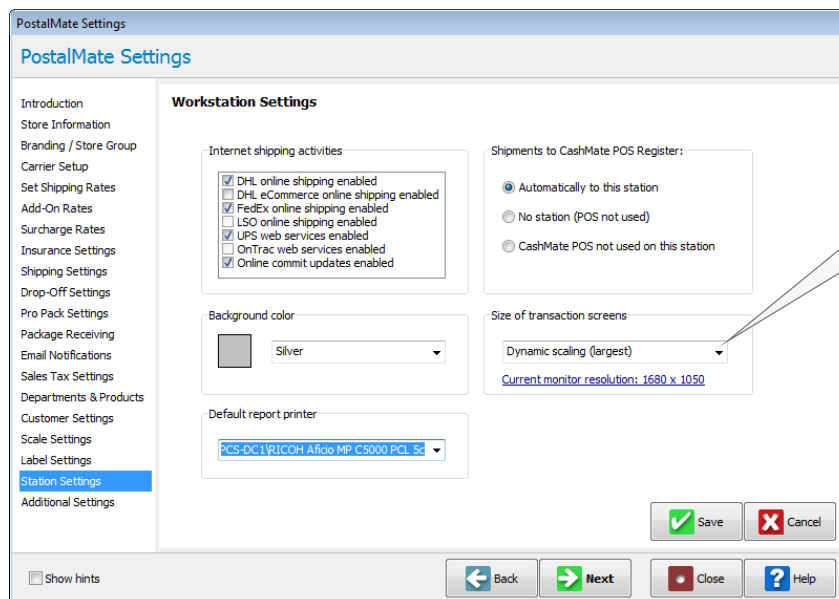
Choose **Tools > PostalMate Settings** and select **Scale Settings** on the left pane to assign your scale. Scales are plug and play and do not require drivers.

Note: If your scale connected to your old computer via Serial (Com port) connection, it's best to install a serial port on your new computer. Serial to USB adapter cables do exist, but not all adapter cables work with scales. It may require trial and error to find an adapter cable that does work and additional drivers may need to be installed.



Station Settings

In **PostalMate Settings** select **Station Settings** on the left pane. Place a checkmark next to each shipping option your store offers as well as **Online commit updates enabled**.



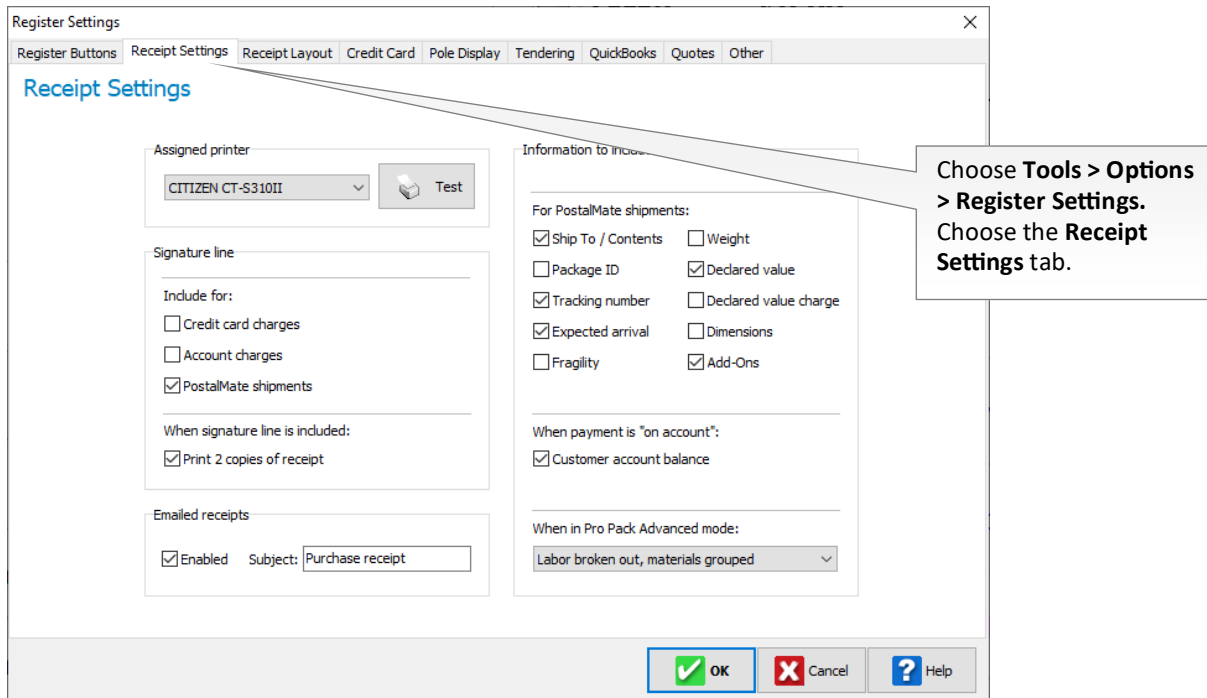
Scale up the size of your PostalMate and CashMate screens here. Choose Dynamic scaling for the optimal fit.

Receipt Printer

Install the latest driver for your specified receipt printer. Typically, the driver will install automatically once you plug it into a new computer. If the driver does not install automatically, you may install a generic/text only driver named **Receipt Printer**. See TechNote titled [Installing a Receipt Printer](#) for more detailed information.

In **CashMate** POS, assign the Receipt Printer.

Choose **Tools > Options > Register Settings**, choose the **Receipt Settings** tab.



Register Settings

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

Receipt Settings

Assigned printer: CITIZEN CT-S310II [Test]

Signature line

Include for:

- ☐ Credit card charges
- ☐ Account charges
- ☒ PostalMate shipments

When signature line is included:

- ☒ Print 2 copies of receipt

Emailed receipts

- ☒ Enabled Subject: Purchase receipt

Information to include

For PostalMate shipments:

- ☒ Ship To / Contents ☐ Weight
- ☐ Package ID ☒ Declared value
- ☒ Tracking number ☐ Declared value charge
- ☒ Expected arrival ☐ Dimensions
- ☐ Fragility ☒ Add-Ons

When payment is "on account":

- ☒ Customer account balance

When in Pro Pack Advanced mode:

Labor broken out, materials grouped

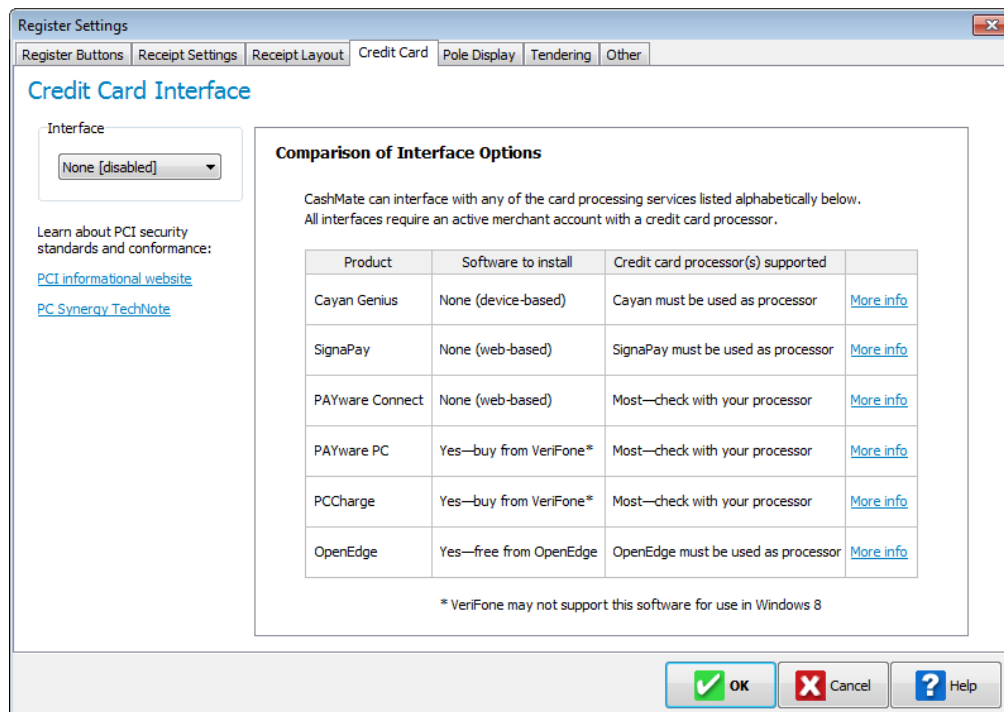
OK Cancel Help

Choose **Tools > Options > Register Settings**.
Choose the **Receipt Settings** tab.

Credit Card

In the POS, assign your Credit card interface (if used).

Choose **Tools > Options > Register Settings**, choose the **Receipt Settings** tab. Select the **Credit Card** tab.



Additional setup instructions are available for each individual credit card interface.

Visit www.postalmate.com. Choose **PostalMate > Help Center**.

[Cayan Genius Payment Card Setup](#)

[PAYware Connect setup](#)

[SignaPay Setup](#)

[OpenEdge Setup](#)