



Version 10.9 Update Guide

About This Update

The primary features in this update are:

- ▶ USPS rate change, effective Sunday, January 22, 2017..... 6
- ▶ Enhanced fuel surcharge updating for all carriers 6
- ▶ Option to select any container in Pro Pack 6
- ▶ Signature capture via Cayan™ Genius® terminal (added in Version 10.9.3) 7

You can run this update at any time. If you update before January 22, you have the option of loading the new rates before they take effect. Beginning January 22, the rate load process will begin automatically. See page 2 for details.

Instructions

1 Run the Update (if you haven't already)

Your system must be on Version 10.8 or higher to run this update.

PostalMate network users: Update each station one at a time, starting with the Master.

You don't need to download the update—that will happen automatically when it's available, and a notification like this (or something similar) will appear on your screen:

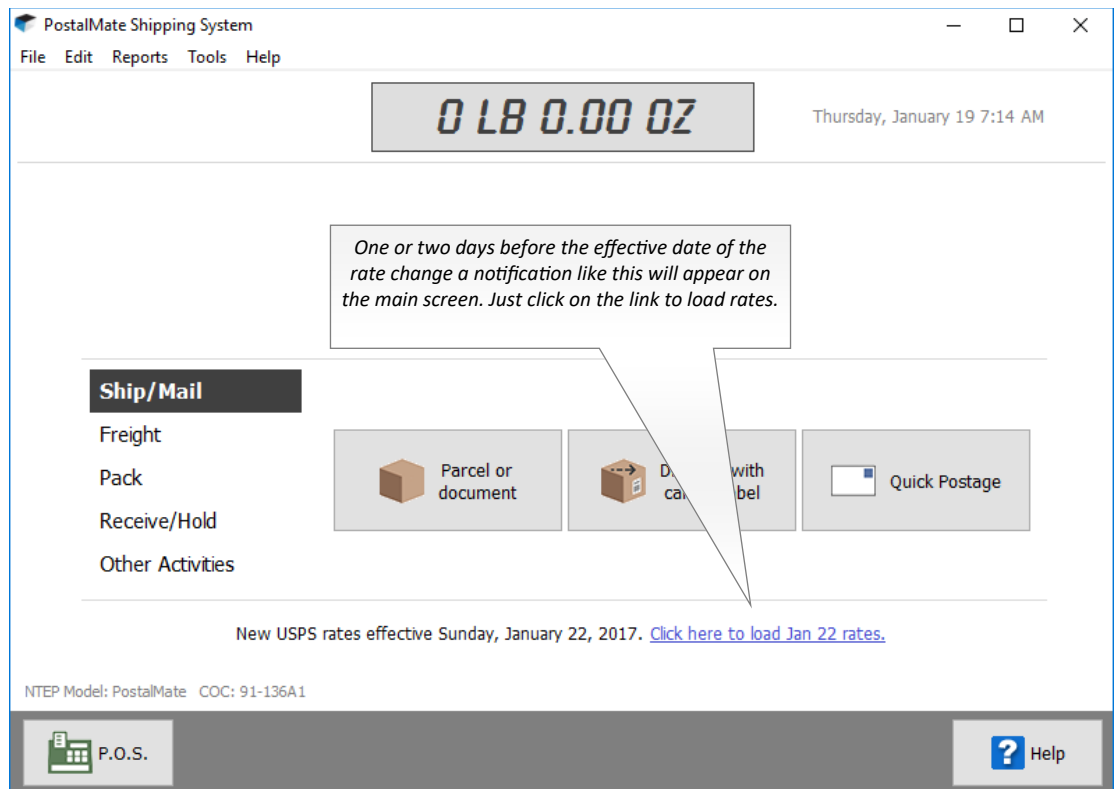


1. Close PostalMate on all workstations. When prompted, do a PostalMate backup.
2. Click on the **notification message**. An update screen will display.
3. Click on the **Update now** button.

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2 Load and set new rates

- After running the update, new published rates need to be loaded for each carrier. You have two choices:
 - **Option #1: Load the rates ahead of time.** This is possible only for USPS, and only if you've run the update before January 22. Either click on the link on PostalMate's main screen as shown below, or choose menu item *File > Carrier Activities > Load 2017 rates.*



- **Option # 2: Wait until January 22.** The rate loading process will begin automatically when you start PostalMate on January 22 or after.
- When prompted, click **OK** to load the published rates.

After the rates load, the Quick Rate Setting Utility will pop up, as shown on the next page. It's designed to assist you in quickly setting your wholesale and retail rates.

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- You'll see the carrier selection screen, but since this is a USPS-only rate change, USPS will be pre-selected and the others will not be selectable. Just click **Next**.

- The next screen, shown below, is for setting your wholesale shipping rates. Choose the desired option and click **Next**.

Wholesale rates are those you pay to the carriers

This is the most common choice

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- The following screen is for setting your *retail* shipping rates. Choose the desired option and click **Next**.

Retail rates are those you charge to your customers

This is the most common choice

Quick Rate-Setting Utility

Retail Rates

Select a method for setting your new Retail rates

- Keep previous percentage (%) margins**
Your profit percentages from last year will be applied to the new carrier rates to create your new Retail rates.
- Keep previous dollar (\$) margins**
Your absolute dollar amount profit margins from last year will be applied to create your new Retail rates.

Apply margins to **Wholesale rates** ▾

- Don't set new Retail rates at this time**
Retail rates will stay the same as they are for now; they can be set later using this utility, or from PostalMate Settings.

← Back **→ Next** ✖ Cancel

- Now set your new retail rates for add-ons, choosing from the options on the screen. After setting your rates, click **Next**.

The easiest way is to click one of these...

Quick Rate-Setting Utility

Add-on Rates

Below are Add-ons that have new Wholesale rates. Set your new Retail rates here.

You can just choose one of these for all existing Add-ons... **Keep same \$ margins** **Keep same % margins**

...and/or you can enter new rates individually

Description	Old		New	
	Whl	Retail	Whl	Retail
▶ USPS Certified	\$3.30	\$5.00	\$3.35	\$5.00
USPS Fragile	\$9.95	\$12.00	\$10.25	\$12.00
USPS Registered Canada	\$13.40	\$15.20	\$14.95	\$15.20
USPS Registered International	\$13.40	\$15.20	\$14.95	\$15.20
USPS Return Receipt Domestic	\$2.70	\$3.25	\$2.75	\$3.25
USPS Return Receipt International	\$3.70	\$4.25	\$3.85	\$4.25
USPS Signature Confirmation (Endicia)	\$2.35	\$3.25	\$2.45	\$3.25

← Back **→ Next** ✖ Cancel

...and/or you can enter new rates individually here

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7. And finally, insurance rates. For the USPS rate change this time around, only the flat amounts are changing—not the “per DVU” rates—so you only need to be concerned with your retail rates in the far right column.

Quick Rate-Setting Utility

Insurance Rates

You can just choose one of these for all rate groups ...

... and/or you can type in rates individually:

Rate group	Per DVU				Flat amount			
	Old		New		Old		New	
	Whl	Retail	Whl	Retail	Whl	Retail	Whl	Retail
▶ USPS International up to \$5000	\$1.15	\$2.30	\$1.15	\$2.30	\$3.85	\$7.70	\$4.05	\$7.70
USPS Non-Priority Mail up to \$300	\$0.00	\$0.00	\$0.00	\$0.00	\$4.35	\$8.70	\$4.40	\$8.70
USPS Non-Priority Mail up to \$400	\$0.00	\$0.00	\$0.00	\$0.00	\$5.50	\$11.00	\$5.55	\$11.00
USPS Non-Priority Mail up to \$500	\$0.00	\$0.00	\$0.00	\$0.00	\$6.65	\$13.30	\$6.70	\$13.30
USPS Non-Priority Mail up to \$5000	\$1.25	\$2.50	\$1.25	\$2.50	\$9.05	\$18.10	\$9.15	\$18.10
USPS Non-Priority Mail up to \$600	\$0.00	\$0.00	\$0.00	\$0.00	\$9.05	\$18.10	\$9.15	\$18.10
USPS Priority Mail Domestic up to \$300	\$0.00	\$0.00	\$0.00	\$0.00	\$4.35	\$8.70	\$4.40	\$8.70

For USPS, only the flat amount rates are changing

Rates for other carriers (such as FedEx and UPS) will also be shown here if you didn't go through this process when their rates changed

8. After setting your new rates, click **Finish**. All of the rates you've set in the wizard will be applied and the Quick Rate-Setting Utility will close. You're done!
- ▶ At any time you can run the utility again by choosing **Edit > Shipping Rates > Quick Rate-Setting Utility** from PostalMate's main menu.
 - ▶ You can also fine tune your rates at any time, using the regular rate-setting features found in PostalMate Settings.

What's New in Version 10.9

This section contains a summary of the major changes and enhancements included in PostalMate Version 10.9.

► USPS rates and services

This update supports the USPS rates effective on January 22, 2017. See page 2 for Information about how and when rates are loaded. Here are highlights of the rate and service changes:

- Rates for all domestic USPS services are changing.
- First Class Mail Letter postage is increasing from \$0.47 to \$0.49. If you're an Endicia user, the rate is *decreasing* from \$0.465 to \$0.46 (because the discount is increasing from a half cent to three cents).
- Rates for all USPS insurance groups are changing.
- Rates are changing for these add-ons: Certified; Fragile; Registered International and Canada; Registered Canada Return Receipt Domestic and International; and Signature Confirmation (Endicia).
- The Priority Mail Express Legal Flat Rate Envelope now has a higher rate than the non-legal-sized envelope, so it's now broken out separately in PostalMate.
- Priority Mail International Flat Rate Envelopes and Small Flat Rate Boxes now have no limit on declared value (previously it was \$400).

► Enhanced fuel surcharge updating for all carriers

PostalMate will now perform a daily check of fuel surcharge percentages for all carriers, and if there are any changes they'll be automatically implemented in PostalMate. Until now fuel surcharges have been updated on a monthly basis and sent to your system via eUpdates. *Please note that you'll no longer get on-screen notifications about fuel surcharge changes.*

► Option to select any container in Pro Pack

If you use the Pro Pack feature in Advanced mode, you may occasionally encounter a packing job in which there are no containers that fit the job parameters, in which case you'll see a message on the screen, "No qualifying materials found." From now on, if that happens, right under that message you'll also see a "Show all" option. If you click that, you'll be able to select from a list of all containers. This gives you flexibility when you have an unusual packing job.

▶ Signature capture via Cayan Genius terminal

Added in Version 10.9.3

If you use the Cayan™ Genius® terminal for credit card processing, your device can now be used to capture signatures in PostalMate's Package Receiving feature. To enable this capability, do the following on each workstation that uses the Genius terminal:

1. From the POS Register main menu, choose **Tools > Options> Register Settings**.
2. Select the **Credit Card** tab. You should already have "Cayan Genius" selected as your credit card interface.
3. Check the box next to **Use as a signature device**.
4. Click **OK** to save.