



Version 8.4 Update Guide

About This Update

This will update your system **from Version 8.3 to Version 8.4**. The primary features in this update are:

- ▶ FedEx International Express online
- ▶ Priority Mail Regional Rate Boxes
- ▶ Setting for turning carrier packaging options on/off
- ▶ Customer address enhancements
- ▶ Customs info added to package history

See *What's New in Version 8.4* beginning on page 3 for more information.

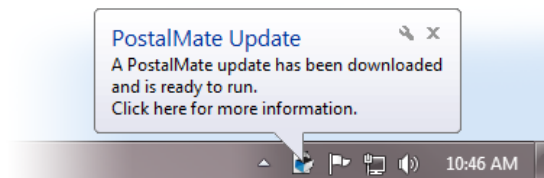
Instructions

1 Run the Update

[You may have already run the update, or are in the process of doing so. If not, follow the steps below.]

PostalMate network users: Every station must be updated one at a time, starting with the Master.

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



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

2 Set retail rates for new features

New carrier packaging

USPS Priority Mail Regional Rate Boxes

PostalMate now supports the new flat-rated USPS Priority Mail Regional Rate Boxes. If you plan to offer them at your location, you'll need to establish retail rates. Here's how:

1. From PostalMate's main menu, go to **Tools > PostalMate Settings**, and choose **Set Shipping Rates** on the left side of the screen.
2. Click on the **Fixed-Rate services** button.
3. Under "Carrier" select "USPS," and under "Service" select "USPS Priority Flat-Rate." Enter retail rates for:

- Priority Mail® Regional Rate Box A, zones 1-8.
- Priority Mail® Regional Rate Box B, zones 1-8.
- Priority Mail® Regional Rate Box C, zones 1-8.

4. Click **Save** and **Close**.

Remain in PostalMate Settings.

New surcharge

FedEx Out-of-Delivery Area (ODA) surcharge

This is a new surcharge in PostalMate (*see page 4 for details*). Set the retail rate as follows:

1. From **PostalMate Settings**, choose **Surcharge Rates** on the left.
2. Select "FedEx" from the drop-down list of carriers.
3. Enter a retail rate for "Out of Delivery Area."*
4. Click **Save** and **Close**.

* There's an existing add-on in PostalMate that can be used to apply the ODA charge manually in certain situations, so you'll probably want the two retail rates to match. To check your add-on rate, from PostalMate Settings, choose "Add-On Rates" on the left, then click the "Advanced" button. Choose "FedEx," then in the Add-On drop-down scroll to "Out-of-Delivery Area" and select it to view the rate. Note that the add-on has a per-pound rate, and the surcharge doesn't; that's because the surcharge's per-pound rate—which is used only when the package is over 100 pounds—will be based on a calculation (the retail rate divided by 100).

What's New in Version 8.4

This section contains a summary of the major changes and enhancements included in Version 8.4.

► FedEx International Express online



PostalMate is the first automated solution in our industry certified by FedEx to ship International Express online

You no longer have to manually complete air waybills for FedEx Express International services—customs information is entered right into PostalMate, and a ramp-ready label is generated, along with a commercial invoice.

Shipping a package

1. Begin the shipment normally. Note that a Customer must be linked to the shipment (this is a FedEx requirement).
2. After you select a FedEx International Express service on the Rate Comparison screen, you'll be prompted for customs-related information.
3. Enter the information below on the screen below. Customer should then review the information for accuracy, and also the FedEx Conditions of Contract. *The box indicating their agreement must be checked to proceed (this is also a FedEx requirement).*

PostalMate Shipping System

File Edit Reports Tools Help

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
1	EA	2	0	CHINA	Cell phone	\$99.00	
1	EA	4	0	USA	User's manual	\$5.00	

Total Qty: 2 Total Customs Value: \$104.00 Total Weight: **6 lbs.**

Remarks to include on customs document:

Name for signature line:

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

Harmonized Codes are optional but may expedite delivery and passage through customs. [Find Harmonized Code Online](#)

Clicking here displays an online version of the FedEx Conditions of Contract.

This box must be checked to proceed. For FedEx International Express, your Customer is the shipper of record (see page 4 for details)

Back Next Cancel Help

4. From here you can proceed normally.

(Continued on page 4)



(Continued from page 3)

About labels and commercial invoices: In addition to the shipping label, one or two additional “International Air Waybill” (AWB) labels will print. The quantity will depend on the country. These replace the old manually-complete air waybills. Leave the backing on these labels and place them in the pouch, along with three signed and dated copies of the Commercial Invoice (an extra invoice copy is printed for you or your customer to keep).

Delivery commitments. Another benefit to this new technology is that PostalMate’s Rate Comparison screen now displays the expected delivery times for FedEx International Express services, when available.

\$78.03	\$86.07
Tue 6/19 by 6:00 PM	Fri 6/15 by 12:00 PM

IMPORTANT: The delivery commitments are barring any customs delays that may result from shipping certain regulated commodities, depending on the country. If in doubt about a specific shipment, you may wish to contact FedEx International Customer Service.

Your Customer is the shipper of record. Unlike with other services, for FedEx International Express shipments, your customer is the official shipper of record, not your store, although the shipment will be billed to your store’s FedEx account. That’s the reason that FedEx wants your customer to approve of the customs-related information entered on their behalf, and on the Conditions of Contract. You can still file claims on your customers’ behalf.

Out-of-Delivery Area surcharge is now applied automatically. In prior versions of PostalMate, the Out-of-Delivery Area (ODA) surcharge (also known as Extended Area Surcharge) was implemented as an add-on in PostalMate—meaning that it was up to you to determine whether or not it should be applied. Now the surcharge is applied automatically when appropriate, depending on the destination address.

Note: There may be rare situations in which you know that the ODA surcharge should be applied, but it doesn’t get applied automatically (for example due to an incorrect address spelling). In that case you can apply the charge manually as an add-on in the Package Details screen. Always take extra care to ensure that address information is spelled properly.

(Continued on page 5)



► Support for Priority Mail® Regional Rate Boxes

PostalMate now supports the range of USPS Priority Mail Regional Rate Boxes, which are rated by zone, but not weight. This includes:

- **Priority Mail Regional Rate Box A**, (has the same wholesale rates as 2-lb Priority Mail)
- **Priority Mail Regional Rate Box B** (has the same wholesale rates as 4-lb Priority Mail)
- **Priority Mail Regional Rate Box C** (has the same wholesale rates as 17-lb Priority Mail)

In all cases you can set different *retail* rates than you've set for their weight-based counterparts listed above, or you can set them the same. Rate-setting instructions are on page 2.

Boxes A and B come in side-loading and top-loading configurations, but there's no pricing difference between the two configurations.

If you don't plan to offer these boxes at your location, a new option in PostalMate allows you to keep them from displaying on the Rate Comparison screen. See the next item below for details.

► Turning carrier packaging options on/off

The variety of carrier-provided packaging options, especially from the US Postal Service, has increased dramatically over time. For whatever reason, you may choose to not offer every carrier packaging option in your store. A new setting allows you to control which options display in rate comparison for "carrier-supplied packaging" shipments.

To disable specified packaging options, go to "Tools > Shipping Settings" and choose the "Carrier Packaging Display" tab. Simply uncheck the box next to any option that you wish to disable.

► Customer address enhancements

The following features, which were previously implemented for Ship To addresses, have now been added to your customer database:

- **Address verification.** When adding a new customer (or editing an existing one), just click the "Verify Address" button.
- **Google Street View.** On the same screen, there's now a "Google Street View" button.
- **Standardized international addresses.** For non-U.S. customers, the generic "Address 3" element has been replaced with standardized city, region and postal code.

► Customs info added to package history

Beginning with international shipments *processed in Version 8.4 or later*, any customs-related information that was entered is stored in the package's history for viewing later. To see the information, use the Find Package feature (available from "Tools > Everyday Tools"), then on the Package History screen, go to the "Additional Info" tab, where the customs info is located if appropriate.

ProPack with international online shipments. Because customs information is now stored in the system, you can now use PostalMate's "ProPack Later" feature with any international online shipment.

▶ **USPS “Open for Next Day”**

When doing a USPS carrier pickup, you’ll now be asked if this is the last pickup of the day, just as you already are for other carriers. If you answer Yes, PostalMate will assume that there will be no more outgoing mail for the rest of the day, and will therefore print the next day’s date on Endicia postage labels.

▶ **“Last Emailed” indicator for Emailed AR statements**

If you send Accounts Receivable statements via email, beginning with statement sent in Version 8.4, the POS system will store and display the date and time that statements were emailed. For an individual customer, this can be found on the Edit Customer screen, on the “Accounts” tab. For entire statement groups, it can be found on the Edit Statement Group screen, and also on the “Email” tab when creating/sending statements.