



Version 9.0 Update Guide

About This Update

The primary features in this update are:

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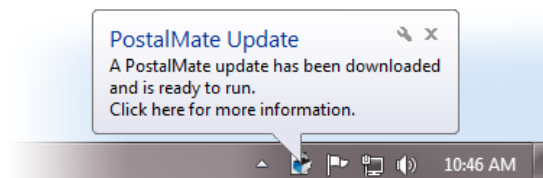
Instructions

Running the Update

If you've already run the update, you can skip this step.

Your system must be on **Version 8.7*** or higher to run this update. [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.

* If you're updating from Version 8.7 or 8.8, be sure to read the Update Guides for versions you're skipping over!

What's New in Version 9.0

This section contains a summary of the major changes and enhancements included in Version 9.0.

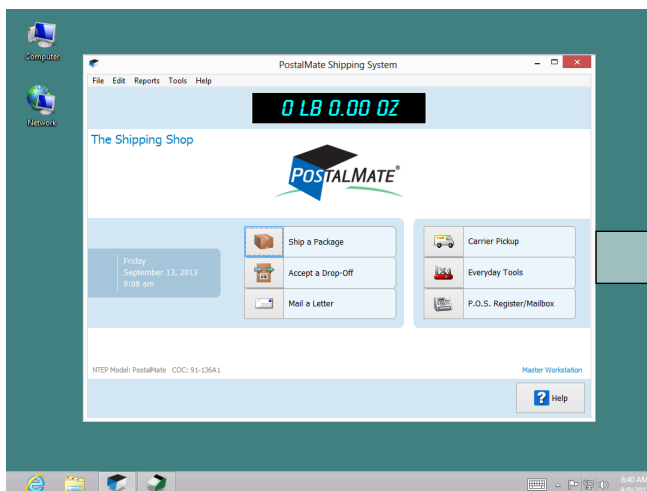
► Scalable transaction screens

PostalMate screens can appear relatively small on monitors set to high resolutions. If you run anything higher than 800 x 600—which is now considered very low, and is not even supported any longer as of Windows 8—you can now scale up (enlarge) PostalMate and POS transaction screens to better fit your monitor. This will make the buttons, text and other controls easier to see and use, especially on touch screens. Here's how to change the scaling of transaction screens (non-transaction screens aren't affected):

1. Go to **Tools > PostalMate Settings**, and choose "Station Settings" on the left.
2. From the drop-down list, select the desired scaling. You may wish to experiment with different sizes. You should also make sure you're using the optimum monitor resolution in Windows—click on the "Current monitor resolution" link to change that setting.
3. Click **Save**. The new setting will not be applied unless you restart PostalMate, which you'll be prompted to do.

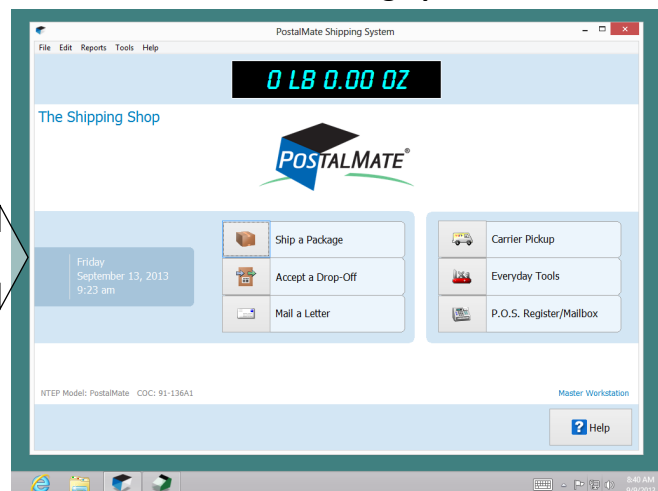
To try a different size, repeat the above steps.

Before scaling up



Here's how PostalMate looks without scaling, on a monitor set to a resolution of 1024 x 768. It looks even smaller on monitors set to higher resolutions.

After scaling up

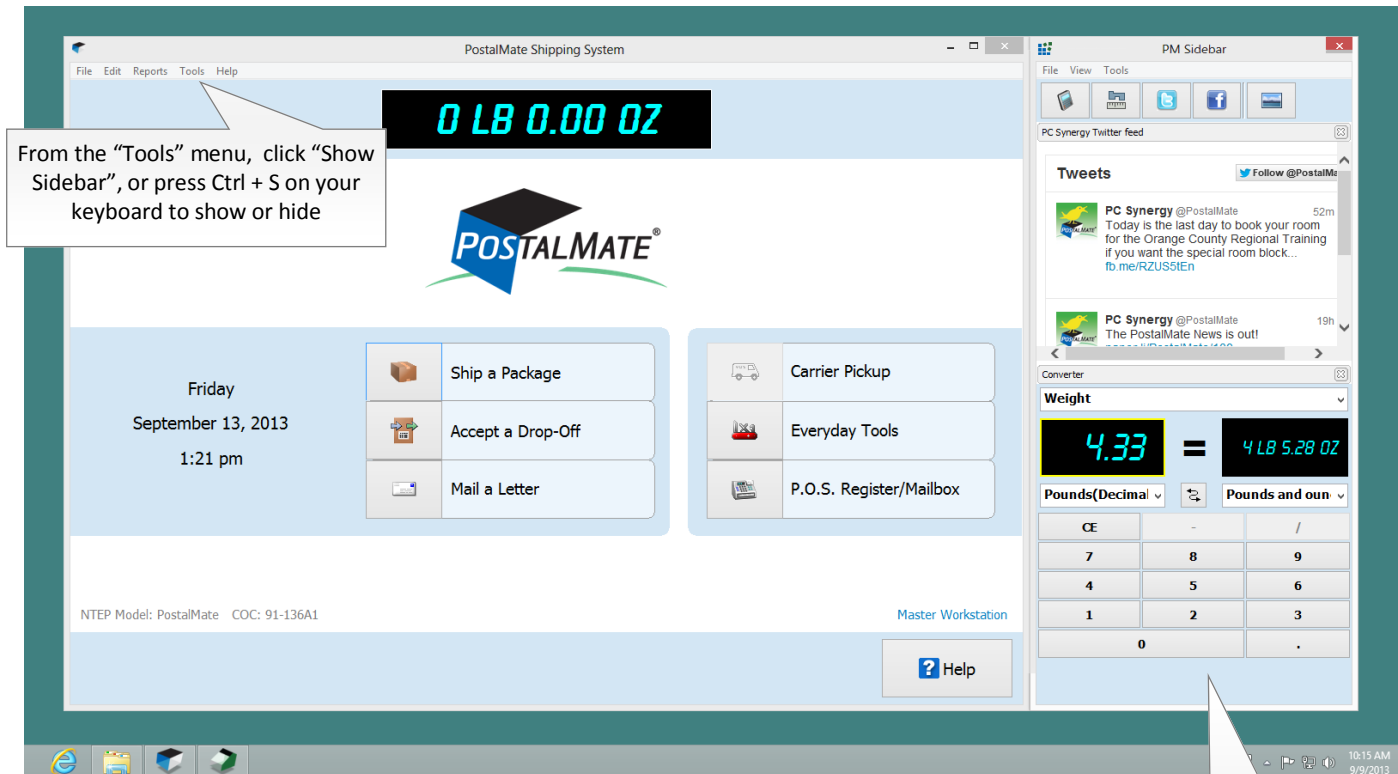


In this example PostalMate has been scaled up 20% larger. Notice how it better utilizes the available space.

If you use wide-screen monitors, the next section shows how the new PostalMate Sidebar can take advantage of your monitor's extra width.

► PostalMate Sidebar

Version 9.0 introduces a useful new tool: the PostalMate Sidebar, 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 to appear on separate **customer-facing monitors**.



PostalMate and Sidebar scaled up 50% , on a widescreen monitor set to a 1600 x 900 resolution.

A glance at how the Sidebar works...

- ✓ There are six pre-defined gadgets, plus you can customize your own for displaying graphics and/or web content.
- ✓ Gadgets can be resized and repositioned on the Sidebar as desired.
- ✓ Gadgets can be undocked from the Sidebar and dragged to any place on the screen—or even to a second customer-facing monitor. The Sidebar itself can be docked or undocked with PostalMate.
- ✓ For customer-facing monitors you can enable the “Twinview” feature on custom gadgets. This displays marketing or other graphics normally, then PostalMate/POS screens during transactions.
- ✓ You can show or hide the sidebar on the fly (pressing Ctrl + S is one way).
- ✓ The Sidebar automatically scales up or down with PostalMate.

Shown here are the Twitter and Converter gadgets. You can choose which gadgets are in the Sidebar, and their relative sizes and positions. You can even customize your own.

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Available Sidebar gadgets

Predefined Gadgets:

- **Calculator.** A simple on-screen calculator for any purpose.
- **Converter.** A full-featured conversion tool that converts world currencies, weight, length, volume and more, from one unit of measure to another.
- **PC Synergy Twitter** and **Facebook** feeds. Keeps you abreast of the latest tweets and posts from us.

Custom Gadgets:

- **Slideshow.** Displays one or more images from the specified folder on your system. If you have a customer-facing monitor, this is a great way to display graphics-based marketing messages (provided by you). See “About Twinview” below.
- **Web content.** You can add one or more gadgets of your own that display the web content of your choosing. These gadgets can also use Twinview.

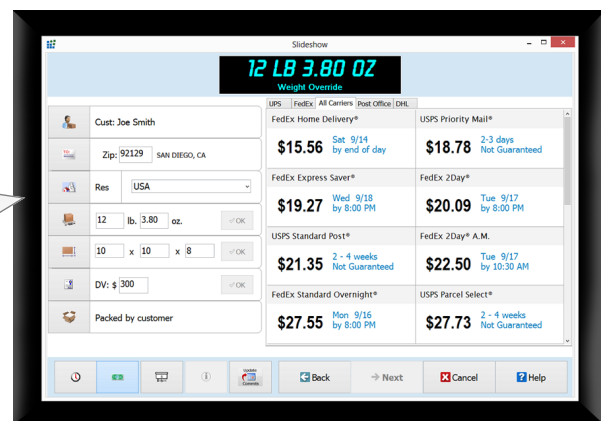
About Twinview...

If you have a separate customer-facing monitor, the custom gadgets can be set to display PostalMate and/or POS screens during transactions. This is called “Twinview.” You can decide which transaction screens will show. See Step 2 on the next page for setting up Twinview. You can then drag that gadget from the Sidebar onto the second monitor and size it accordingly. *



Here the Slideshow gadget has been dragged onto a customer-facing monitor. The gadget displays one or more graphics (that the store has put into a Windows folder)...

...until a PostalMate transaction is initiated—then it displays PostalMate screens for the customer. When the transaction is completed it will once again display the slideshow.



* This technique isn't available if both monitors are connected to a splitter—a dual-monitor video card is required.

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Launching and setting up the Sidebar

1. **Start.** To launch the Sidebar, just select **Tools > Show Sidebar** from either the PostalMate or POS Register main menu, or in PostalMate press Ctrl + S on your keyboard.
2. **(Optional) Set up custom gadgets.** From the Sidebar menu, choose **Tools > Settings**.
 - To edit the Slideshow graphic, select it and click **Edit**. Browse to the folder where you keep the graphics you wish to have displayed. This can be any folder on your system. Click the “Twinview” box if desired. Click **OK**.
 - To add a gadget for web content, click **Add**. Type in a short name for the gadget, then enter the web address (URL) for the content to be displayed. Click the “Twinview” box if desired. Click **OK**.
 - If you plan to use Twinview, click the **Twinview** button to select which transaction screens to display. Click **OK**.

When done, click **OK** to close the Sidebar Settings screen.

3. **Select which gadgets to display.** At the top of the Sidebar, click on the corresponding buttons to show or hide gadgets. You can make your selections from the “View” menu.
4. **Position the Sidebar and gadgets.**
 - Drag the Sidebar into whatever position you like. It can “snap” to either side of PostalMate’s main screen, or to an edge on the monitor. You can also adjust the size of the Sidebar by dragging its edges.
 - To position a gadget, click on its title bar and drag it. If you have two or more gadgets in the Sidebar you can change their relative sizes by putting your cursor between them and dragging.
 - You can undock gadgets from the Sidebar, and drag them anywhere, even to a second monitor. This is especially useful when using Twinview (see “About Twinview” on the previous page).
5. **Save.** Once you have the Sidebar set up to your liking, from the Sidebar menu choose **Tools > Save current layout**.

► RS Package Insurance Brokered by Marsh

RS Package Insurance is a new offering from Retail Shipping Associates (RSA), in partnership with Marsh Insurance. Key features are:



- **RS Package Insurance covers all elements of the transaction, at the retail level.** The premium is *based on the declared value of the contents*, and that provides coverage for the contents, plus the replacement value of packing materials and labor, the shipping cost, and your retail margin (profit).
- **Drop-offs can be insured.** RS Package Insurance allows you to sell insurance coverage on drop-off packages tendered by FedEx, UPS, and Endicia (USPS) customer account holders.

RS Package Insurance costs significantly less than carrier coverage. There are two price levels; one for RSA Basic Members and another for RSA Premium Members.

Please note that when using RS Package Insurance, you can't allocate any portion of the declared value to another insurance provider (including shipping carriers). If the declared value is \$100 or less, coverage will automatically go through the shipping carrier.

Signing up for RS Package Insurance

Membership with Retail Shipping Associates is required. Membership information is available at www.rscentral.org.

Sign up for RS Package Insurance at www.rscentral.org/MarketPlace/RS-Package-Insurance.aspx. You'll need to log in with your RSA user name and password.

Enabling and setting up in PostalMate

First make sure you've signed up for RS Package Insurance, as explained above.

1. From PostalMate's main menu, choose **Tools > PostalMate Settings**.
2. On the left, select **Insurance Settings**.
3. Under "Alternate Insurance setup" click "**Companies and rate groups.**"
4. Select "RS Package Insurance" and click **Edit**. If you haven't already done so, enter your RSA ID (membership number).
5. Click **Verify**. This will verify your account status and level.
6. Click the "Enabled" checkbox, then click **OK**.
7. Set your retail rates for the appropriate rate groups using the Global rate-setting feature, or click on the "Set rates individually" button.
8. Click on the "**Map services to coverage**" button. To apply the default mapping, click the "**Apply automatic mapping....**" button (or you can map services manually if you prefer).



[RSA Package Insurance](#)



▶ PAYware Connect

This is a new interface for credit card processing, augmenting the four existing interfaces in the POS Register. Like PCCharge and PAYware PC, PAYware Connect is a VeriFone product, and most processors are supported. *However, unlike those offerings, VeriFone supports PAYware Connect for use in Windows 8.*

PAYware Connect is a web-based subscription service, and no VeriFone software or support contract is required.

Note: The PAYware Connect interface is fully operational in this version of PostalMate, however as of 9/16/2013 final arrangements with Verifone are still in progress. This process is expected to be completed within a few days. For more information, contact OLSON & IVES, our authorized reseller of PAYware Connect: Phone (800) 205-0650, or email to rick@olsonives.com.



▶ Commitments for DHL Express

Projected delivery day and time commitments for DHL Express international services are now displayed, when available, on the Rate Comparison screen.



▶ USPS Priority/Express Mail changes

Note: This was implemented in PostalMate Version 8.9.3—however it's documented here in case you're updating directly from an earlier version.

Service name changes. For marketing purposes, the USPS has decided to include Express Mail under the Priority Mail branding, resulting in name changes for several services. In a nutshell, the term “Express Mail” is now “Priority Mail Express.” This is reflected on PostalMate’s Rate Comparison screen and elsewhere. Be aware that this will make it a bit more challenging to distinguish between “regular” Priority Mail and Express. This is a name change only; service levels for Express are not changing.

Delivery days on labels. If you use the Endicia Label Server online shipping interface, the expected delivery day will now appear on the labels. For Priority Mail this is not a guarantee.

Insurance. The USPS is now offering the first \$50 of coverage at no charge for domestic Priority Mail services. If you use the USPS as your insurer, this rule is applied in PostalMate.

Rules among third-party insurers vary. For Shippersurance, the first \$50 is free; for declared values over \$50, you’ll be charged for the entire declared value amount (however the total insurance charge will still be far less than the USPS charge would be). For Endicia Parcel Insurance, the first \$50 is *not* free; their standard rating will apply as before (which is significantly less than the USPS charge would be).

► Mailbox Activity Report enhancements

Previously you could access this report only from the Mailbox Manager; now you can also get to it by Customer from the POS Register. To do so, select the Customer, then click “Edit” and go to the “History” tab. Then click on the “Mailbox Activity” button, then “Report.” If accessed this way, and the Customer has more than one mailbox, it will list activity for all of that Customer’s mailboxes. A new column has been added that designates the mailbox number(s).

► DHL Global Mail [Beta test]

Note: As of this writing, this new service is available only in the Greater Los Angeles area. It will be rolled out nationally over time.



DHL Global Mail is a new service designed to compete aggressively at a cost level with private ground service package carriers. DHL Global Mail shipments can save customers as much as 40% over other ground delivery services. Each shipment has up to \$100 automatic insurance protection and tracking. DHL Global Mail utilizes the USPS for final-mile delivery to every address in the U.S.

In PostalMate, DHL Global Mail is treated as a separate carrier from DHL Express. Among other reasons, that’s because DHL Global Mail pickups may be separate from DHL Express (for example, in California, DHL Global Mail pickups is contracted to OnTrac).

Using this service requires membership with RS Associates (RSA). If your store qualifies, and you’d like to use DHL Global Mail, see [TechNote: DHL Global Mail](#)

► DAZzle interface discontinued

In PostalMate Version 8.3, released in January 2012, the Endicia Label Server (ELS) interface was introduced as a replacement for DAZzle, which is an older technology. As of Version 9.0, the DAZzle interface is no longer in PostalMate. If you’re currently using DAZzle and you wish to continue online USPS shipping, you must switch over to the ELS interface. The change is simple, and you’ll enjoy numerous benefits with the more modern solution.

For more information, including setup instructions, see PostalMate TechNote [“Setting Up Endicia Label Server.”](#)