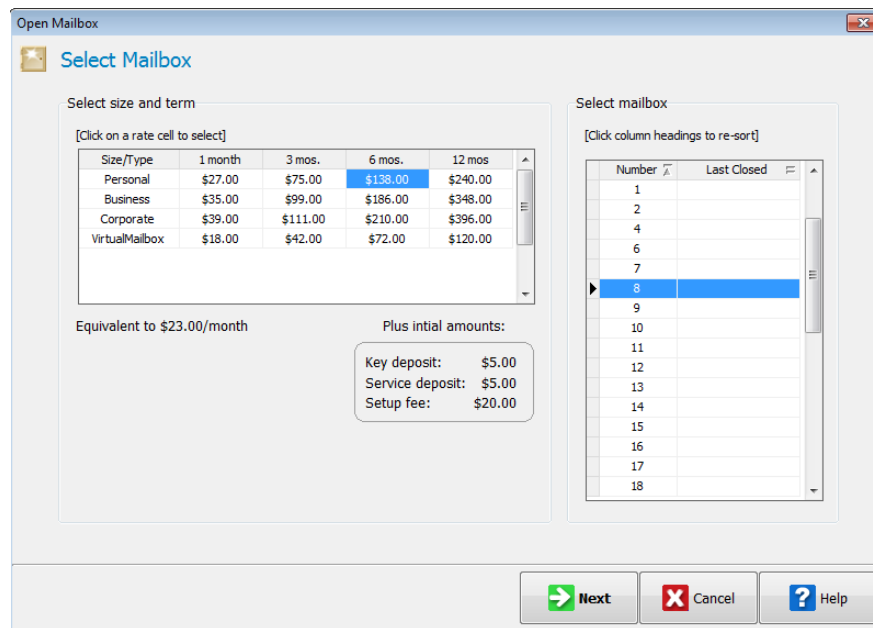


Opening a Mailbox

From Mailbox Manager, choose the **Open New** button.

- Select the term your box holder will be renting the box for. The default term will be highlighted.
- Choose a box from the list of available boxes on the right. Click **Next**.



Size/Type	1 month	3 mos.	6 mos.	12 mos
Personal	\$27.00	\$75.00	\$138.00	\$240.00
Business	\$35.00	\$99.00	\$186.00	\$348.00
Corporate	\$39.00	\$111.00	\$210.00	\$396.00
VirtualMailbox	\$18.00	\$42.00	\$72.00	\$120.00

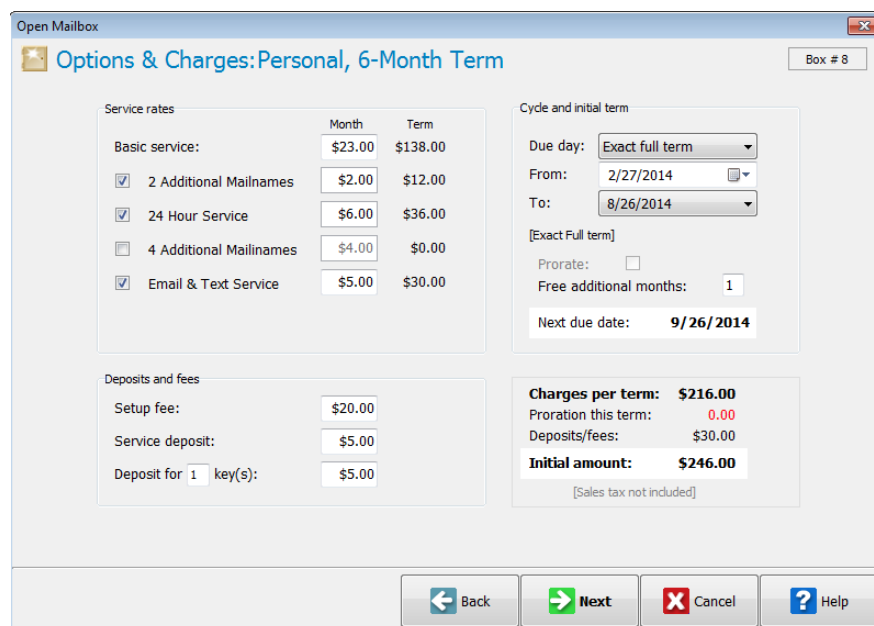
Equivalent to \$23.00/month

Plus intial amounts:

Key deposit: \$5.00
Service deposit: \$5.00
Setup fee: \$20.00

Number	Last Closed
1	
2	
4	
6	
7	
8	
9	
10	
11	
12	
13	
14	
15	
16	
17	
18	

- Choose the services this box holder will subscribe to and select the appropriate due dates, fees and proration. Click **Next**.



Options & Charges: Personal, 6-Month Term

Box # 8

Service rates

	Month	Term
Basic service:	\$23.00	\$138.00
<input checked="" type="checkbox"/> 2 Additional Mailnames	\$2.00	\$12.00
<input checked="" type="checkbox"/> 24 Hour Service	\$6.00	\$36.00
<input type="checkbox"/> 4 Additional Mailnames	\$4.00	\$0.00
<input checked="" type="checkbox"/> Email & Text Service	\$5.00	\$30.00

Deposits and fees

Setup fee: \$20.00
Service deposit: \$5.00
Deposit for 1 key(s): \$5.00

Cycle and initial term

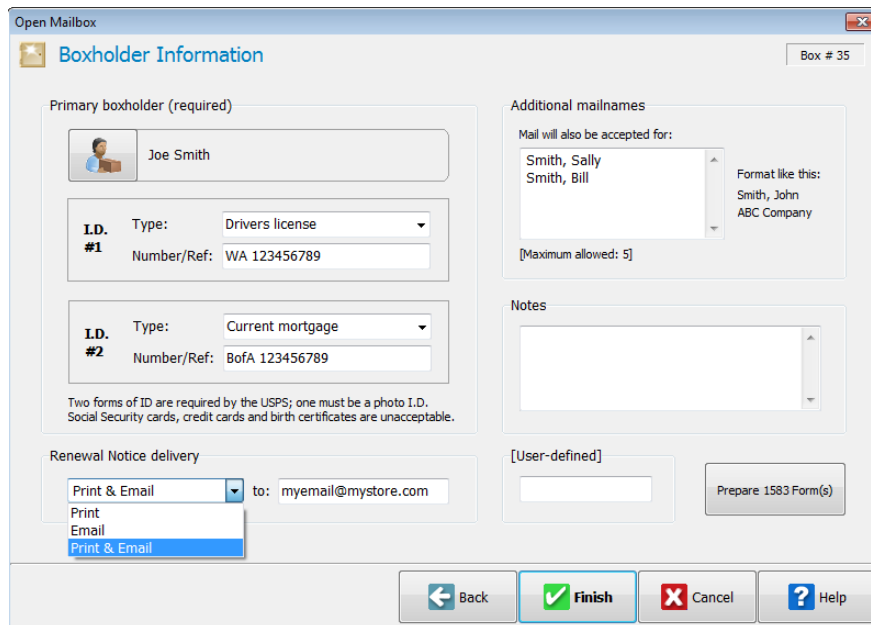
Due day: Exact full term
From: 2/27/2014
To: 8/26/2014

[Exact Full term]
Prorate:
Free additional months: 1
Next due date: 9/26/2014

Charges per term: \$216.00
Proration this term: 0.00
Deposits/fees: \$30.00
Initial amount: \$246.00

[Sales tax not included]

- You must assign a customer to this box. You may select from your existing customer database or add a new customer.
- Enter ID as required by the USPS.
- Select how notices will be sent: Print, Email or Print & Email. Enter or update the email address if necessary.
- Enter any additional names that will receive mail in this box.
- Use the 1583 button to print the required forms for each box holder.
- Click **Finish** and return to the register screen to total your sale and collect your fees.



The screenshot shows a software window titled "Open Mailbox" with a sub-header "Boxholder Information" and "Box # 35". The form is divided into several sections:

- Primary boxholder (required):** A dropdown menu shows "Joe Smith". Below it are two ID entry fields:
 - ID #1:** Type: "Drivers license", Number/Ref: "WA 123456789".
 - ID #2:** Type: "Current mortgage", Number/Ref: "BofA 123456789".
- Additional mailnames:** A list box contains "Smith, Sally" and "Smith, Bill". A note says "Mail will also be accepted for:" and "Format like this: Smith, John ABC Company". A limit of "[Maximum allowed: 5]" is shown.
- Notes:** An empty text area.
- Renewal Notice delivery:** A dropdown menu is set to "Print & Email" with a sub-menu open showing "Print", "Email", and "Print & Email". The "to:" field contains "myemail@mystore.com".
- [User-defined]:** An empty text field.
- Buttons:** "Prepare 1583 Form(s)", "Back", "Finish" (with a green checkmark), "Cancel" (with a red X), and "Help" (with a question mark).

Optional: Enter Existing Mailbox Accounts

If you already have mailbox accounts, you'll probably want to bring them into the Mailbox Manager. This is done via a wizard-style data entry procedure for each mailbox account.

1. From the Mailbox Manager, choose **Tools > Enter Existing Mailbox Accounts**. Click **Yes** to continue.
2. Beginning with the first account, select the appropriate size, term and mailbox. Click **Next**.
3. Select the appropriate service options, due date and other details. Click **Next**.
4. Click on the Customer button and select the appropriate customer from the database, or add a new one if necessary. Complete the ID fields, and add any notes as appropriate. Click **Next**. You'll be asked if you wish to enter another account.
5. Click **Yes** to add the next account. Repeat steps 3—4 for each account you wish to enter. When finished entering accounts, choose **No** at this point.
6. For any accounts that have forwarding, you must set up forwarding individually. This is a separate process (see page 5).

Renewing a Mailbox

- From Mailbox Manager, choose the **Renew Existing** button.
- Find the mailbox you wish to renew and click **OK**.
- The term and rates will be defaulted from when the mailbox was opened or last renewed. Review and make any needed changes, including adding options or adjusting fees and click **OK**.

Term/Basic service			Options and totals		
1	month x \$36.00 =	\$0.00	<input type="checkbox"/> 2 Additional Mailnames	\$2.00	\$0.00
3	months x \$34.00 =	\$0.00	<input type="checkbox"/> 24 Hour Service	\$6.00	\$0.00
6	months x \$32.00 =	\$0.00	<input type="checkbox"/> 4 Additional Mailnames	\$4.00	\$0.00
12	months x \$30.00 =	\$360.00	<input type="checkbox"/> Email & Text Service	\$5.00	\$0.00
Free additional months: 0			Service options total: \$0.00 \$0.00		
*Rate(s) last term are different than current store rates			Basic service: \$30.00 \$360.00		
Fill with rates from last term			Service to 07/27/2016: \$360.00		

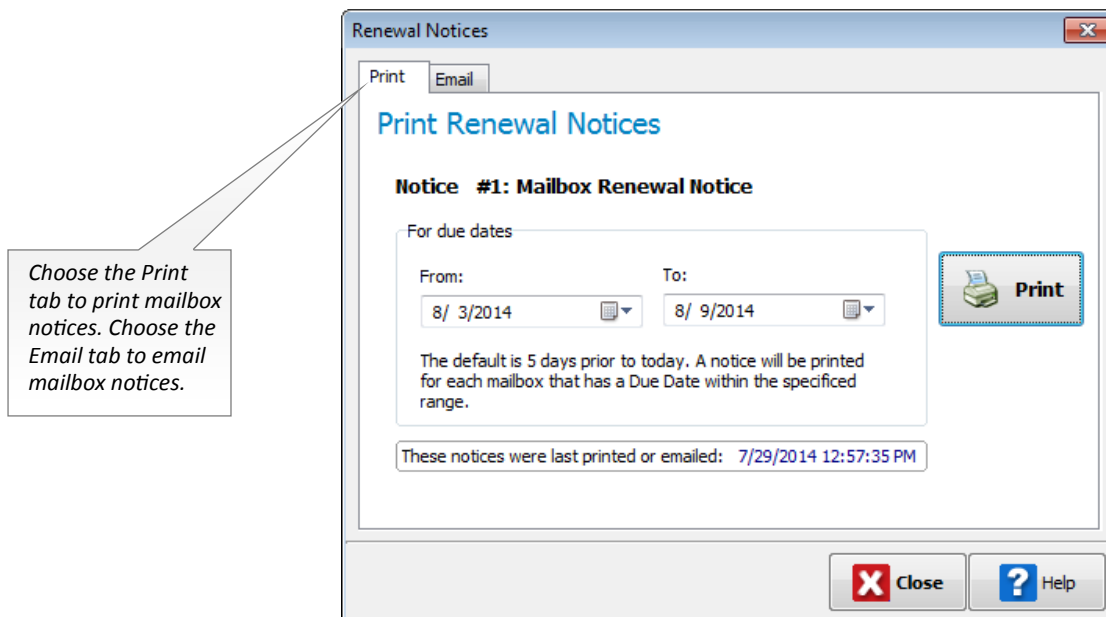
If your mailbox rates have changed since the last renewal, you have an option to use the current store rates, or the rates from the last term.

If you wish to offer a free month on renewal, enter the number of free months here.

Click **OK** and the mailbox transaction will be sent to your POS so you can complete the transaction.

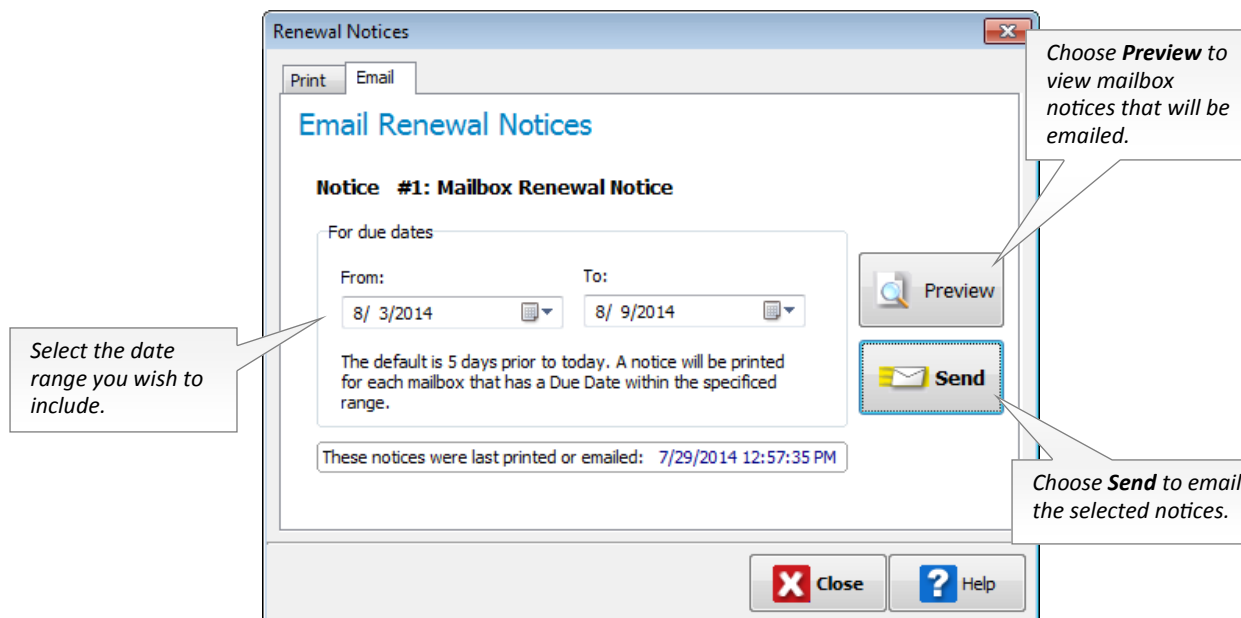
Print Mailbox Notices

From Mailbox Manager, choose **Tools > Print Mailbox Notices** and select **First...**, **Second...**, or **Third...**



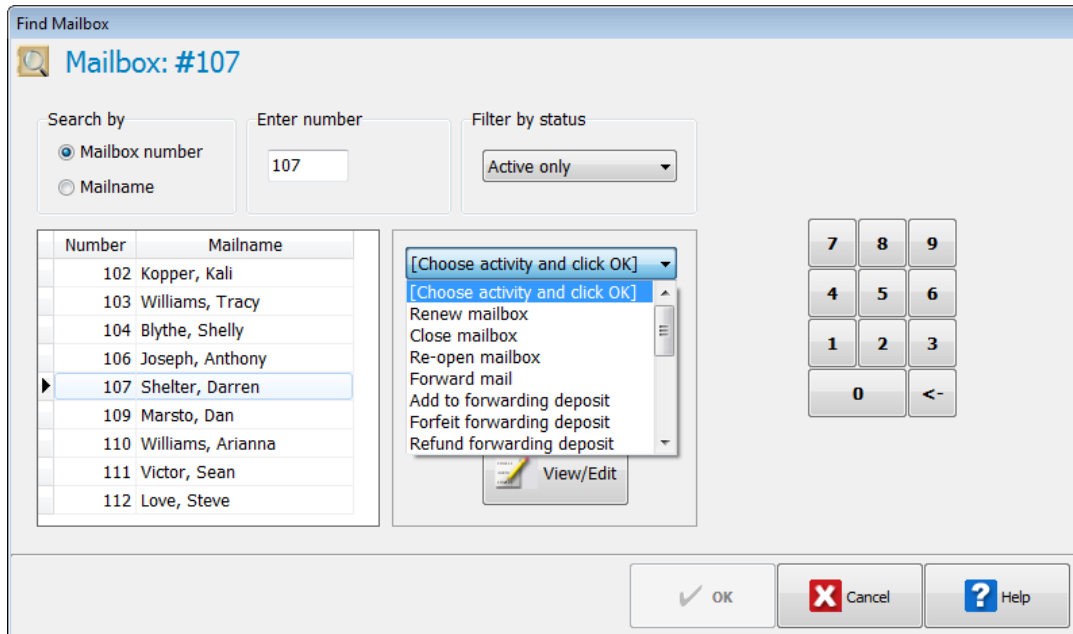
Email Mailbox Notices

In order to Email mailbox notices, each mailbox must be set up with either **Email** or **Print & Email** delivery. Setup can be done for individual mailboxes by going to **Find Mailbox**, select the mailbox you wish to edit, select **View/Edit** and then choose the **Detail** tab. Alternately, you can setup multiple existing box holders in Mailbox Manager for **Email** or **Print & Email** delivery by selecting **Tools > Setup and Preferences > Renewal Notices > Setup for mailboxes**.



Mailbox Activities

Additional Mailbox Manager options can be found in **Find Mailbox**, by selecting the drop down arrow next to **Choose activity and click OK**.

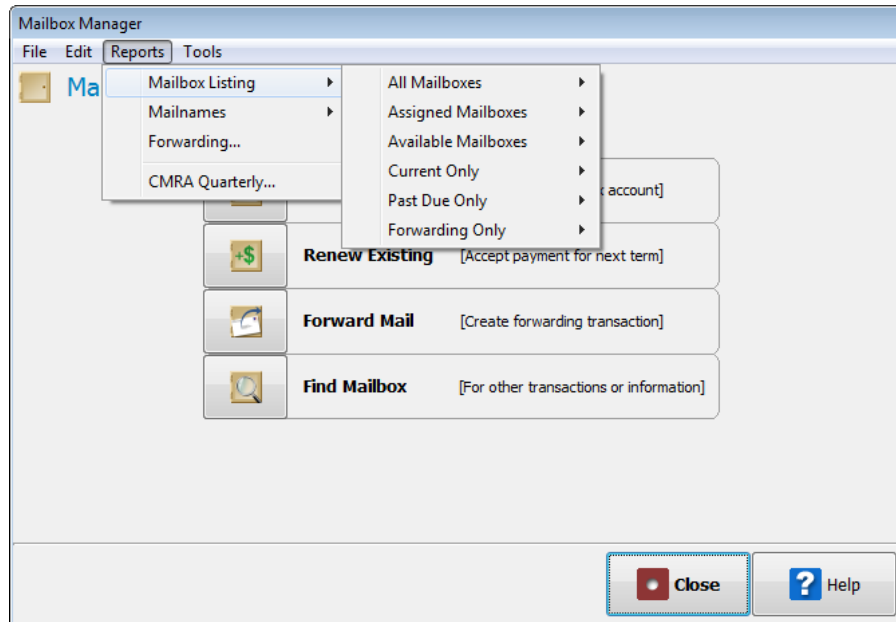


Optional: Set up Forwarding for Existing Mailbox Accounts

1. From the Mailbox Manager, click the **Find Mailbox** button.
2. Select the desired mailbox, and click the **View/Edit** button. The Edit Mailbox screen will appear.
3. Click on the **Forwarding** tab.
4. To enable (start) forwarding, select **Yes**.
5. Select a forwarding Cycle. If you choose **According to schedule** (the default), then enter the number of days between each forwarding.
6. Enter a beginning and ending date for the forwarding period.
7. Accept the default fee (flat amount charged per forwarding) or enter a different amount.
8. Select how the fee will be applied or charged. To set up a traditional forwarding deposit, set up (or use an existing) debit account. Alternatively, you can apply charges to a credit account or credit card.
9. (Optional) Supply a forwarding address: Click the **To** button to select a 'Ship To' from the PostalMate database, or to add a new one.
10. (Optional) Enter forwarding notes. This can be anything, for example, to discard junk mail, or to use a specific shipping carrier for forwarding.
11. Click **OK**. Initial setup is now complete, and all Mailbox Manager features are ready to use.

Reports

Mailbox Manager includes many reports that are useful in day-to-day operations of mailboxes and mail forwarding.



CMRA Quarterly Report

This is a Mailbox Manager report, designed to meet USPS regulations.

If you offer mailbox services in your store, you are considered a CMRA (Commercial Mail Receiving Agency) by the Postal Service, and each quarter you are required to submit this report to your local Post Office, as specified in section D042.2.7.d of the Domestic Mail Manual (DMM). It provides a listing of customers cross-referenced to their mailboxes.

The report is due on January 15th, April 15th, July 15th, and October 15th of each year. If you run this report earlier than the due date it will show last quarter data. This is per regulation.

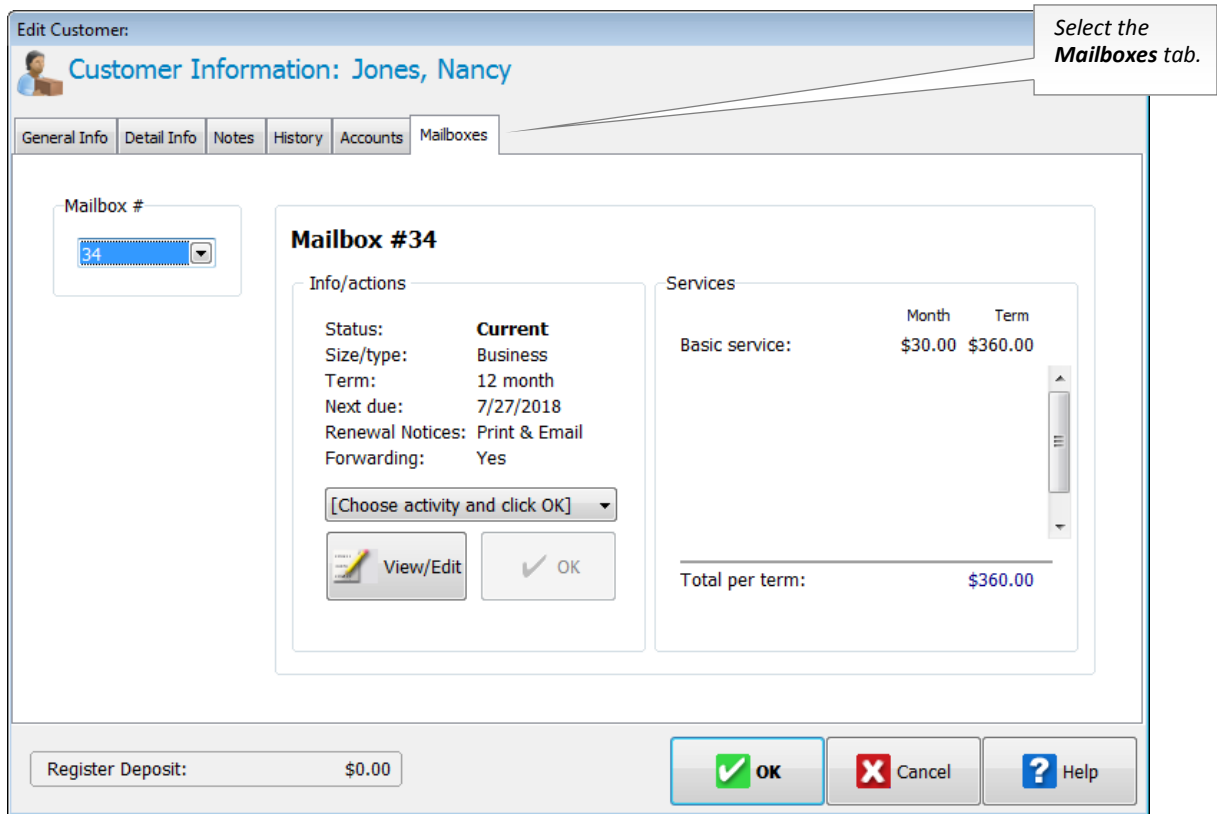
Mailbox Manager Help

For more detailed information than what is in this brief document, click on any Help button. The topic most closely relating to that screen will be displayed. On the left is a Table of Contents, which has a special “book” just for the Mailbox Manager. You can also use the Index and/or Search features if you’re looking for something specific.

Mailboxes tab on Edit Customer screen in the POS

For your convenience, a “Mailboxes” tab is also located on the Edit Customer screen in the POS Register. This provides an additional way to see mailbox information for a given customer, and to initiate mailbox activities.

From the POS Register screen, choose the Customer button or **Edit > Customer**. Use the search criteria to locate the customer and choose **Edit**.



Customer Information: Jones, Nancy

General Info | Detail Info | Notes | History | Accounts | **Mailboxes**

Mailbox #
34

Mailbox #34

Info/actions

Status: **Current**
 Size/type: Business
 Term: 12 month
 Next due: 7/27/2018
 Renewal Notices: Print & Email
 Forwarding: Yes

[Choose activity and click OK]

View/Edit OK

Services

	Month	Term
Basic service:	\$30.00	\$360.00
Total per term:		\$360.00

Register Deposit: \$0.00

OK Cancel Help

Select the Mailboxes tab.