

**RS Package Insurance Setup** 



TechNote #210. Rev. 11.03.2016

RS Package Insurance is offered from RS Associates, in partnership with Marsh Insurance.

In order to use RS Package Insurance by Marsh, you must;

1. Be a current member of RS Associates:

If you are not a member of RS Associates, go to <u>www.rscentral.org</u> and select "Membership > Join Now" and complete all steps to become a member. *Note: RS Package Insurance has two rate structures—on for RS Basic Members and one for RS Premium Members.* 

2. Apply for the RS Package Insurance program at Retail Shipping Associates.

To apply for the RS Package Insurance program, please login to <u>http://www.rscentral.org/</u> <u>Programs/RS-Package-Insurance</u>, choose **Apply** and follow the steps to complete the application. Once your RS Package Insurance account is setup, you can activate RS Package Insurance in PostalMate with your RSA Member ID number.

#### Alternate Insurance Setup

When using RS Package insurance, you cannot allocate any portion of the declared value to another insurance provider (including shipping carriers).

In PostalMate, choose Tools > PostalMate Settings and select Insurance Settings on the left pane.

PostalMate Sett	ings	3. Set retail rates.
Introduction Store Information Branding / Store Group	Insurance Settings Global rate-setting Advanced rate-setting	See page 3.
Carrier Setup Set Shipping Rates Add-On Rates	1. Add a 50 % margin or 100 % markup       2. Check which rate group(s) to apply the above to:	
Surcharge Rates Insurance Settings Shipping Settings Drop-Off Settings Pro Pack Settings Package Receiving	OPH     Endica     Fredix     UPS     USPS     Map services to coverage	1. Setup RS Package Insurance log-in credentials. See page 2.
Email Notifications Sales Tax Settings Departments & Products Customer Settings Scale Settings Label Settings Station Settings Additional Settings	<ul> <li>3. Apply &amp; Save</li> <li>4. Repeat steps 1-3 as desired for any set of sec</li> <li>Use Endicia Insurance for USPS</li> <li>Allocate entire DV to alternate insurer</li> <li>*Replaces carrier-provided coverage; also known as "3rd-party" insurance</li> </ul>	2. Set RS Package Insurance as your default coverage to all applicable services. See page 2.
Allocating the the initial "free example: If yc amount will be insurance rath	entire DV to alternate" allows you to cover e" amount with RS Package insurance. For ou enter \$90 DVU for a FedEx shipment, this e covered, and charged, by RS Package er than by FedEx.	



#### 1. Companies and rate groups

- Choose the button Companies and rate groups.
- Select **RS Package Insurance** and choose **Edit.**
- Enter your **RSA ID** and click **Verify**.
- Verify the box "Enabled" is checked.
- Once your credentials are verified, click **OK** to save your changes.
- Close the Edit Alternate Insurance Company screen.

Reference		Rate	Groups		cannot be edited.
Name:	RS Package Insurance	RS	5 Certified Domestic 5 Certified International		
RSA Accou RSA Me RSA ID	unt Status embership Level: Certified ): xxxxxxxxx Status: Verified Verify			Edit	

#### 2. Map Services to Coverage

Introduction Store Information	Insurance Settings	
Branding / Store Group	Global rate-setting	Advanced rate-setting
Carrier Setup Set Shipping Rates	1. Add a     50     % margin or     100     % markup       2. Check which rate group(s) to apply the above to:	Set rates individually Choose Map services to
Surcharge Rates Insurance Settings Shipping Settings Drop-Off Settings Pro Pack Settings Package Receiving Email Notifications Sales Tax Settings Departments & Products Customer Settings Scale Settings Label Settings	ADV ADV DHL Endicia FedEx FedEx Dhpsurance Dhpsurance DFS J	Alternate Insurance* setup  Comparing and rate groups  Map services to coverage  Use Endicia Insurance for USPS Allocate entire DV to alternate insurer  *Replaces carrier-provided coverage; also known as "3rd-party" insurance
Additional Settings		🗸 Save 🔀 Cancel

TechNote F	Page 3		
	Map Services to Insurance If you use Alternate (3rd party) Insurance, thi Select one or more services, then choose the o	ce Coverage is is where you assign a rate group to each service, desired coverage from the drop-down list on the right	t.
	Carrier Service	Default coverage	<b>^</b>
	FedEx 2Day AK/HI	RS Certified Domestic	
	FedEx 2Day AK/HI [flat rate]	RS Certified Domestic	Select All
	FedEx 2Day [AK/HI origin]	RS Certified Domestic	
	FedEx 2Day [AK/HI origin] [flat rate]	RS Certified Domestic	Deselect All
	FedEx 2Day [D]	RS Certified Domestic	
	FedEx 2Day [flat rate]	RS Certified Domestic	D ( 110
	FedEx Economy Canada	RS Certified International	Default Coverage:
1. From the drop-down	FedEx Economy International	RS Certified International	RS Certified International V
menu. choose RS	FedEx Economy Puerto Rico	RS Certified International	
Package Insurance and	FedEx Express 1Day Freight	RS Certified Domestic	
click Apply.	FedEx Express 2Day Freight	RS Certified Domestic	
	FedEx Express 3Day Freight	RS Certified Domestic	
2. Choose <b>Yes</b> to the	FedEx Express Saver Commercial	RS Certified Domestic	<b>v</b>
warning message         asking if you wish to         proceed.    Automatic mapping: RS Package Insurance           Apply			
3. Click <b>OK</b> to save.			OK Cancel Pelp

# 3. Rate setting (Global)

Use Global rate-setting to quickly set your retail rates for RS Package insurance. Using the Global Rate setting tool ensures that your retail rates for RS Package Insurance are increased by the percentage you enter. If you are happy with these rates—you may skip the next step of Advanced Rate Setting.

	PostalMate Sett	Insurance Settings	Advanced rate-setting	Optionally, you can also use Advanced rate-setting to set rates individually for each rate group.
<ol> <li>Enter the % margin or markup you wish to increase the wholesale rates by.</li> <li>Select RS Package Insurance.</li> <li>Click Apply &amp; Save.</li> <li>Package Receiving Email Notifications Sales Tax Settings Departments &amp; Products Customer Settings Scale Settings Label Settings Additional Settings</li> <li>Additional Settings</li> </ol>		Alternate Insurance* setup     Alternate Insurance* setup     Image: Companies and rate groups   Image: Comp	See next page for details.	
	Show hints	Back	Next Close	



## Rate setting (Advanced)

Use **Advanced rate-setting** for setting specific retail rates for RS Package insurance for both Domestic and International rate groups.

**Retail Flat Amount:** Enter a Retail Flat amount for each row, except the last row. The flat amount is the "minimum charge." This screen allows you flexibility in setting a Retail Flat amount for each declared value range (even though the flat amount is the same).

**Retail Percent:** Enter a Retail Percent in the last row. This percent is multiplied by the declared value entered in PostalMate for all amounts above the minimum rate charge.

The example below displays a 50% retail margin for all rate groups.





## Insuring Drop-Off packages (optional)

- You can use RS Package Insurance to insure drop-off packages. •
- Once you have completed the initial setup for RS Package Insurance in PostalMate, choose Tools > PostalMate Settings > Drop-Off Settings.
- Select **RS Package Insurance** from the drop down and click **Save**. •

Introduction	Drop-Off Settings		
Store Information			
Branding / Store Group	Carrier-specific settings	Add-One and Insurance	
Carrier Setup	Carrier-specific settings	Add-ons and insurance	
Set Shipping Rates	Service: FedEx ~	Description	Enabled Retail
Add-On Rates		Email notification	\$0.00
Surcharge Rates	Compensation: 0.00 (carrier pays store)	Taping and searing	\$0.00
Insurance Settings	Retail charge: 0.00	Insurance: RS Package Insurance	$\sim$
Shipping Settings		Dessist	
Drop-Off Settings		Receipt	
Pro Pack Settings		Store disclaimer:	
Package Receiving			
Email Notifications			
Sales Tax Settings			
Departments & Products			
Customer Settings		Printer:	Copies
Scale Settings		[None]	× 1 ×
Label Settings			
Station Settings			
Additional Settings			
			Save 🛛 🔀 Canc

Now, you can add insurance to any drop-off. A Customer and Ship To must be selected and Contents must be filled in before selecting Insurance. The insurance will be uploaded when you choose **Record**.

Scan or enter tracking #	Optional Customer, Ship To and
✓ОК	Applies to all packages: Contents are required to
	8 Customer: SALLY SMITH add RS Package Insuran
Tracking Number         Carrier         Amount           1 789565656561656         FedEx         1 0.00	Applies only to selected package: to a drop-off.
	Ship To: STEPHEN JONES
	Email notification 0.00
	Taping and sealing         0.00
	✓ Insurance (\$500.00) 4.00
Delete	Contents: enter contents here
Do not print receipts Packages: 1 Base amount: \$0	00 Options: \$4.00 Tax: \$0.00 <b>Total: \$4.00</b>
FedEx service marks are owned by Federal Exp	ess Corporation and used by permission.



## **Using RS Package Insurance**

RS Package insurance cannot be split with any other insurance carrier, including Carrier insurance. All declared value is allocated to RS Package Insurance automatically (including the first \$100 of declared value). As needed, you can allocate all of the declared value to Carrier insurance.

		FedEx service marks are owned by Federal Express Corporation and used by permission		
	Add-Ons	reals de tree maine are officia by reacha Express corporation and accord premission.		
		Choose optional services:		
	EadErr	FedEx Date Certain Home Delivery®         \$6.00           Delivery will be made on specified date         \$6.00		
	<b>FEGEX</b> .	FedEx Evening Home Delivery®       \$14.00         Delivery will be made between 5:00 PM and 8:00 PM       To allocate do	alarad	
Facilities have	FedEx Home Delivery®	FedEx Appointment Home Delivery®       \$30.00         FedEx will contact recipient in advance to arrange date and time       insurance for of	ciarea er a	
that your insurance is		FedEx® Delivery Signature Options       \$8.50-\$10.50       specific shipm         A specified recipient signature is required upon delivery       "Alt : \$ amount"	ent, ue 1t″ link.	
allocated to RS		Declared value: \$500 Alt: \$500 Charge: \$7.50		
insurance.		Total package cost including add-ons: \$30.50 <i>Checkmark the "Do not use alternate insul</i>	₂ box rance".	
	Allocate Dec	clared Value of: \$600		
		This allows you to override the default of how insurance is split between the primary and alternate providers.		
		Shipping/Primary Carrier 7 8 9		
		4 5 6 [\$50,000.00 maximum]		
		Alternate Provider		
	\$ 0 To RS_certified Domestic			
		[\$100,000.00 maximum]		
	Do not use alternate insurance			
		ок 🔀 Cancel 🔐 Help		



# **Certificate of Insurance**

For each shipment in which RS Package insurance applied, you can retrieve, save and print the Certificate of Insurance through Find Package.

In PostalMate, choose Everyday Tools > Find Package.

Locate the shipment using any of the search criteria.

- Choose View.
- Select the Additional Info tab.
- Choose Get Certificate.

Package History	
General Info Additional Info Charges FedEx Package Status	
Additional Information         Physical         Package dimensions:       N/A         Object dimensions:       N/A         Package weight:       0 LB 8.00 OZ         Dimensional Weight:       N/A         Other:       Packed by:         Customer       Contents:	Insurance Declared Value: \$500.00 Primary (shipping carrier) \$0.00 Alternate provider(RS Premium Domestic) \$500.00 ID: 4445917000059 Get Certificate Note: Terms of coverage and/or terminology may vary between providers
Label Packing	Close Help

#### Reporting

When using RS Package Insurance, the insurance information is uploaded to RS Servers at the time of the shipment with specified insurance information. The shipment upload will include date, package ID, zip, carrier and service, declared value, and alternate declared value.

Use the Alternate Insurance report to view/print a log of RS Package Insurance transactions by date range. This report is located under *Reports > Shipping > Alternate Insurance*.