

## Drop-off Settings

In PostalMate, choose **Tools > PostalMate Settings**. Select **Drop-Off Settings** on the left pane.

**Settings for each carrier:**

- Select a Carrier.
- Enter a Compensation amount or a Retail Charge.
- Select a Department (for retail charges associated with drop-offs that will be carried over to the POS Register).

**Optional Add-ons:**

Check the box for "Enabled" and enter a retail amount as desired. If left unchecked, they will not display on the Drop-Off screen. (Note: Email notification for regular shipments must be enabled to use the email notification add-on.)

PostalMate Settings

**PostalMate Settings**

Introduction

Store Information

Branding / Store Group

Carrier Setup

Shipping

Freight Settings

**Drop-Off Settings**

Pro Pack Settings

Package Receiving

Email Notifications

Sales Tax Settings

Departments & Products

Customer Settings

Scale Settings

Label Settings

Station Settings

Additional Settings

### Drop-Off Settings

**Carrier-specific settings**

Service: UPS

Compensation: 0.80 (carrier pays store)

Retail charge: 0.00

Department: UPS

UPS Access Point™ log-in\*

User: [blacked out]

Password: [blacked out]

\* UPS Access Point™ is a website where you must enter drop-offs to be compensated.

Use Windows default browser

Enable pickup report

**Add-Ons and Insurance**

| Description          | Enabled                             | Retail |
|----------------------|-------------------------------------|--------|
| ▶ Email notification | <input checked="" type="checkbox"/> | \$0.00 |
| Taping and sealing   | <input checked="" type="checkbox"/> | \$0.00 |

Insurance: Shipsurance

**Receipt**

Store disclaimer:

I, the undersigned, certify that the Retailer identified below ("Retailer") has provided me a list of items/substances that are considered potentially Hazardous, Illegal, Prohibited, Dangerous or

Receipt Printer     Label Printer    Copies: 1

Printer: Receipt Printer    Test Printer

These settings apply only to UPS, and only for ASO locations that use the UPS Access Point website for reporting drop-offs.

If you use an Alternate Insurance company: Shipsurance or RS Package Insurance, you may use either to cover drop-off shipments.

**Drop-Off receipts:**

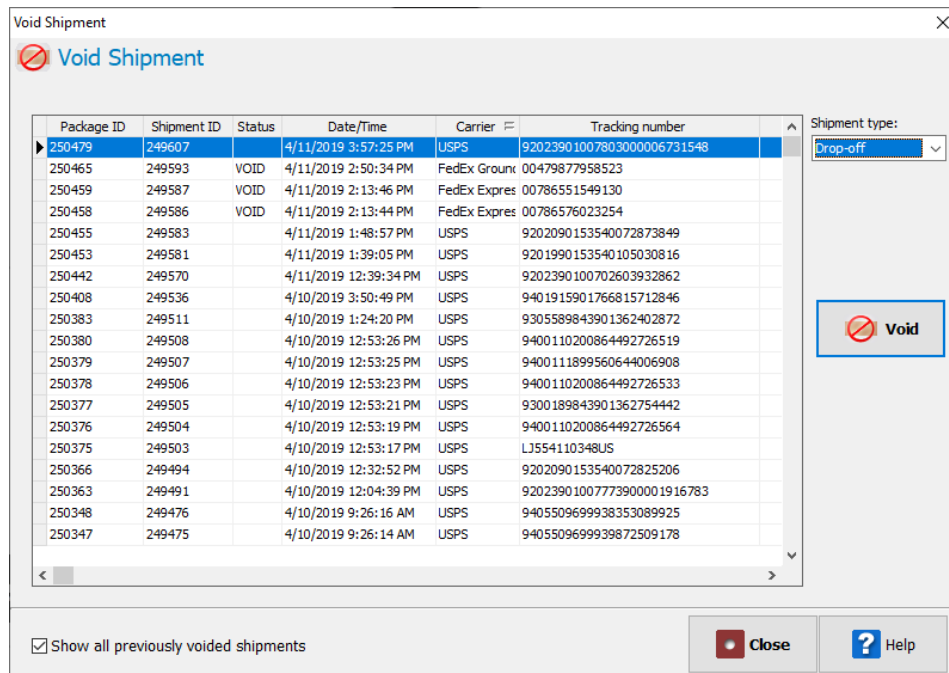
- Enter your disclaimer for drop-offs (optional).
- Select your receipt printer, or 4x6 label printer.
- Choose how many copies you wish to print. Note: Selecting a receipt printer and setting copies to "None" will set your default to not print drop-off receipts, allowing you to print on demand.

## Additional Notes on Setup

- Drop-Off receipts:** Receipts can print to a receipt printer or 4x6 label printer. View PostalMate’s [Hardware Requirements](#) for a list of supported printers.
- Compensation vs. Retail charges:** Generally if a store is being compensated by a carrier for drop-offs, the store is not allowed to charge its customers for accepting them. Unless your store has a special arrangement with the carrier, the retail amount should be set to \$0.00 when a compensation amount is entered.
- Add-On’s:** The Email Notification and Taping and Sealing add-ons are optional. If the boxes are not checked, they will not display on the Drop-Off screen. Email (Delivery) notification for shipments must be set up in order to use the email notification add-on for drop-offs. If you have not yet started using Email notification, please see TechNote titled [Email Notification](#) for more information on setup. **Note:** Make sure to perform daily carrier pickups in PostalMate. The carrier pickup begins the process of email notification.

## Voiding Drop-Offs

If you need to void a recorded drop-off, go to the Void Shipment screen (**Everyday Tools > Void Shipment**). Use the filter on the right side of the screen, (below “**Shipment type:**”) to select Drop-offs.



| Package ID | Shipment ID | Status | Date/Time             | Carrier       | Tracking number            |
|------------|-------------|--------|-----------------------|---------------|----------------------------|
| 250479     | 249607      |        | 4/11/2019 3:57:25 PM  | USPS          | 9202390100780300006731548  |
| 250465     | 249593      | VOID   | 4/11/2019 2:50:34 PM  | FedEx Ground  | 00479877958523             |
| 250459     | 249587      | VOID   | 4/11/2019 2:13:46 PM  | FedEx Express | 00786551549130             |
| 250458     | 249586      | VOID   | 4/11/2019 2:13:44 PM  | FedEx Express | 00786576023254             |
| 250455     | 249583      |        | 4/11/2019 1:48:57 PM  | USPS          | 9202090153540072873849     |
| 250453     | 249581      |        | 4/11/2019 1:39:05 PM  | USPS          | 9201990153540105030816     |
| 250442     | 249570      |        | 4/11/2019 12:39:34 PM | USPS          | 9202390100702603932862     |
| 250408     | 249536      |        | 4/10/2019 3:50:49 PM  | USPS          | 9401915901766815712846     |
| 250383     | 249511      |        | 4/10/2019 1:24:20 PM  | USPS          | 9305589843901362402872     |
| 250380     | 249508      |        | 4/10/2019 12:53:26 PM | USPS          | 9400110200864492726519     |
| 250379     | 249507      |        | 4/10/2019 12:53:25 PM | USPS          | 9400111899560644006908     |
| 250378     | 249506      |        | 4/10/2019 12:53:23 PM | USPS          | 9400110200864492726533     |
| 250377     | 249505      |        | 4/10/2019 12:53:21 PM | USPS          | 9300189843901362754442     |
| 250376     | 249504      |        | 4/10/2019 12:53:19 PM | USPS          | 9400110200864492726564     |
| 250375     | 249503      |        | 4/10/2019 12:53:17 PM | USPS          | LJ554110348US              |
| 250366     | 249494      |        | 4/10/2019 12:32:52 PM | USPS          | 9202090153540072825206     |
| 250363     | 249491      |        | 4/10/2019 12:04:39 PM | USPS          | 92023901007773900001916783 |
| 250348     | 249476      |        | 4/10/2019 9:26:16 AM  | USPS          | 9405509699938353089925     |
| 250347     | 249475      |        | 4/10/2019 9:26:14 AM  | USPS          | 9405509699939872509178     |

Show all previously voided shipments

## Recording Drop-Offs (Simple)

Choose **Ship/Mail** on the left and select the **Drop-off with carrier label** button.

**Drop-Off:**

Scan or enter tracking #

1Z7681A20398331077

| Tracking Number    | Carrier | Amount |
|--------------------|---------|--------|
| 1Z7681A20398331077 | FedEx   | 0.00   |

Optional

Applies to all packages:

Applies only to selected package:

Contents:

Do not print receipts   Packages: 1   Base amount: \$0.00   Options: \$0.00   Tax: \$0.00   **Total: \$0.00**

FedEx service marks are owned by Federal Express Corporation and used by permission.

Scan or type in the tracking number. If it is a known tracking number format, the service will automatically select.

Choose **Record**. Your receipt will print with the tracking number and drop-off disclaimer.

Check this box if you do not need a receipt for this drop-off.

## Recording Drop-Offs (Enhanced)

**Drop-Off:**

Scan or enter tracking #

| Tracking Number        | Carrier | Amount |
|------------------------|---------|--------|
| 1Z7681A20398331077     | UPS     | 0.0    |
| 9407110200828017665526 | USPS    | 0.0    |
| 786678824074           | FedEx   | 0.0    |
| 786678383036           | FedEx   | 0.0    |

Optional

Applies to all packages:

Applies only to selected package:

Email notification   0.00

Taping and sealing   0.00

Contents:

Do not print receipts   Packages: 4   Base amount: \$0.00   Options: \$0.00   Tax: \$0.00   **Total: \$0.00**

FedEx service marks are owned by Federal Express Corporation and used by permission.

Include a **Customer** and/or a **Ship To**.

Select email notification and/or taping and sealing. The price can be overridden at the time of the drop-off.

Enter the description of the contents.

Your receipt will finalize with a tracking number, contents, Customer name, Ship To name and address as well as your drop-off disclaimer when you click **Record**.

## Recording Drop-Offs (Enhanced) continued...

Including a Customer and/or a Ship To has multiple benefits:

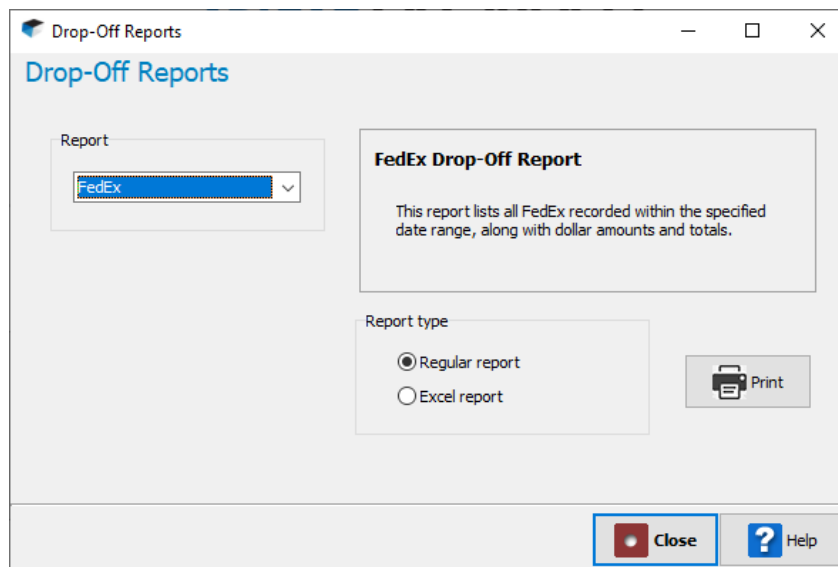
- **Package history:** Ability to locate the shipment in Find Package by “Customer” to retrieve the tracking information at a later date.
- **Email Notification:** While you can add email addresses on the fly when processing drop-offs with email notification, you can also add your frequent drop-off customers and include their email address for quick processing.
- **Receipt:** The selected customer will display on the receipt as well as the Ship To address information.
- **Customer Conversion report:** Track your drop-off customers to see who you have converted into a paying customer.

## Drop-Off Reporting

### 1. Drop-Off Report:

- Choose **Reports > Shipping > Drop-Off > By Carrier.**
- Choose a **Carrier** and click **Print.**
- Select a date range and click **OK.**

This report is available in standard or Excel format.



2. **Customer Conversion Report:** This report lets you track your drop off customers (that have been added to your database) to see who has been converted into a paying customer.
  - Choose **Reports > Shipping > Drop-Off > Customer Conversion .** (Choose Standard or Excel format.)