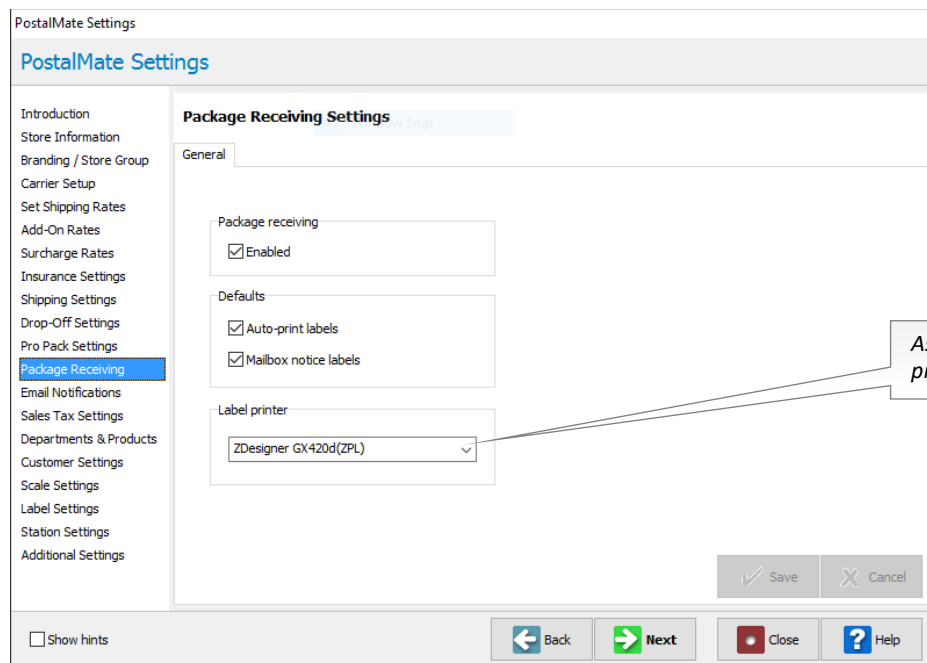


Process, manage and keep records of incoming packages for mailbox holders and other customers.

You can log packages delivered to your store by any supported carrier, and then release them to the designated recipients. ID and mailbox notice labels can be printed for easy package identification and lookup. If you'd like to require signatures for package releases, Topaz signature devices (Standard Pads and LCD Pads) are supported.

## Enabling and Setup

1. Go to **Tools > PostalMate Settings**, and choose **Package Receiving** on the left.
2. Check the **Enabled** box.
3. If you want labels to print automatically (labels can also print on demand by clicking a button at the time of receiving); check the corresponding boxes.
4. Assign a label printer, which will normally be the same 4x6 printer used for your regular shipping label. Click **Save**, then **Close**.



The screenshot shows the 'PostalMate Settings' window with the 'Package Receiving Settings' tab selected. The 'General' sub-tab is active. The 'Package receiving' section has the 'Enabled' checkbox checked. The 'Defaults' section has 'Auto-print labels' and 'Mailbox notice labels' checkboxes checked. The 'Label printer' dropdown menu is set to 'ZDesigner GX420d(ZPL)'. A callout box points to this dropdown with the text 'Assign 4x6 label printer here.'. At the bottom right, there are 'Save' and 'Cancel' buttons. At the bottom of the window, there are 'Back', 'Next', 'Close', and 'Help' buttons. A 'Show hints' checkbox is located at the bottom left.

For signature capture, launch PostalMate System Utilities and choose **Tools > Signature Capture Device** to see device information and links. See the last page of this TechNote for more info.

## Setup Email Notifications for Package Receiving

1. Email notifications for shipments must be enabled for package receiving emails to work.

In PostalMate, choose **Tools > PostalMate Settings > Email Notifications**. On the **Shipment** tab, “Enabled” should have a checkmark. See TechNote titled [Email Notifications](#) for more information on this feature.

**PostalMate Settings**

**Email Notification Settings**

From

Store name: PostalMate Store

Store email:\* support@pcsynergy.com

\*This can be different than the email entered in your store information.

These settings are uploaded and stored on PC Synergy servers.

Shipment | Delivery | Tracking Options | **Package Receiving**

Enabled

Defaults

Send to: Customer  Copy to store  Auto send

Marketing content

Text:

Image URL:

Custom Image

Show hints

*If shipment notifications are not yet enabled, place a checkmark in this box...*

**PostalMate Settings**

**Email Notification Settings**

From

Store name: PostalMate Store

Store email:\* support@pcsynergy.com

\*This can be different than the email entered in your store information.

These settings are uploaded and stored on PC Synergy servers.

Shipment | Delivery | Tracking Options | **Package Receiving**

Email text

You have received a package that will not fit in your mailbox!  
We are holding it for you to pick up.  
Please stop by as soon as possible.

Marketing content

Text:

Image URL:

Custom Image

Show hints

*...then, choose the Package Receiving tab.*

*Enter the text you wish to display on the email here.*

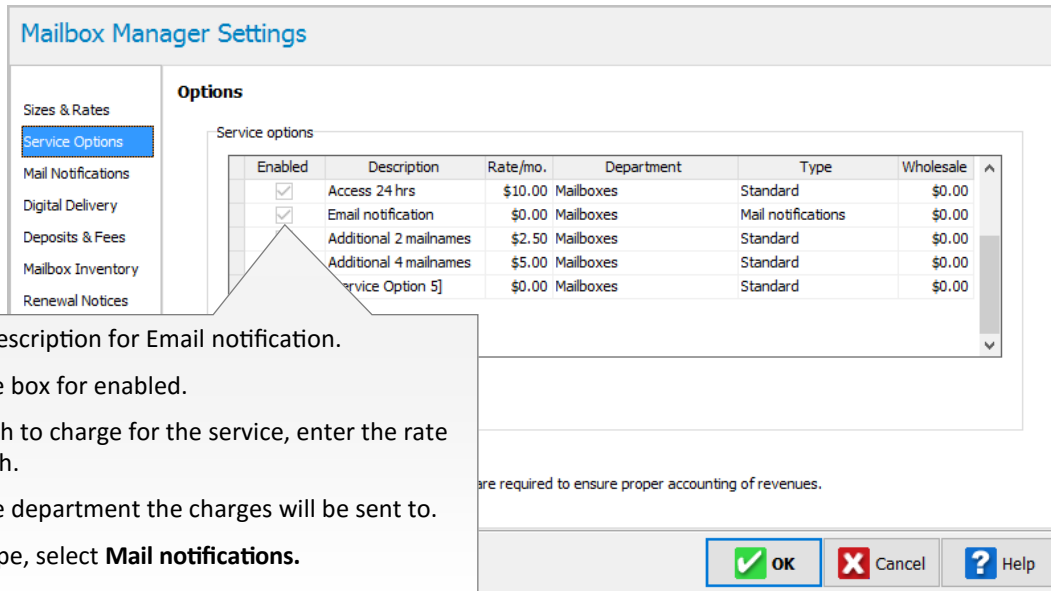
*You may enter marketing content here. HTML is allowed.*

*Optional: enter the URL for your store logo image, this will also display on the email.*

## Setup Email Notifications for Package Receiving continued...

### 2. Add the service in Mailbox Manager

- In Mailbox Manger, choose **Tools > Settings**. Select **Services Options**



**Mailbox Manager Settings**

**Options**

Service options

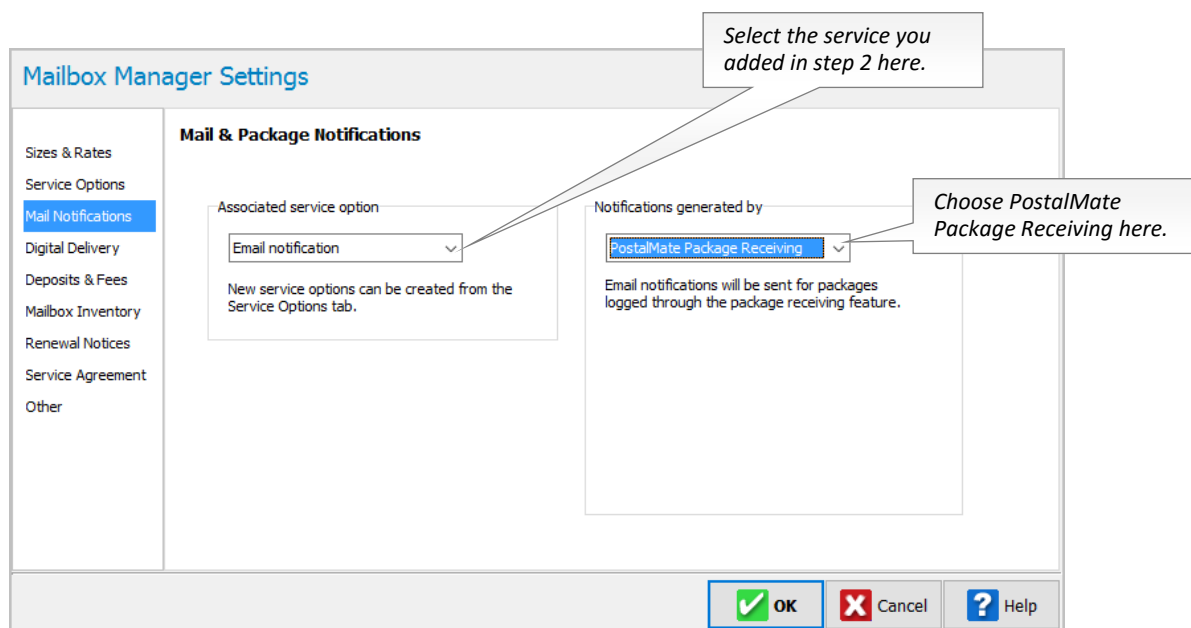
Enabled	Description	Rate/mo.	Department	Type	Wholesale
<input checked="" type="checkbox"/>	Access 24 hrs	\$10.00	Mailboxes	Standard	\$0.00
<input checked="" type="checkbox"/>	Email notification	\$0.00	Mailboxes	Mail notifications	\$0.00
<input type="checkbox"/>	Additional 2 mailnames	\$2.50	Mailboxes	Standard	\$0.00
<input type="checkbox"/>	Additional 4 mailnames	\$5.00	Mailboxes	Standard	\$0.00
<input type="checkbox"/>	Service Option 5]	\$0.00	Mailboxes	Standard	\$0.00

are required to ensure proper accounting of revenues.

OK Cancel Help

1. Enter a description for Email notification.
2. Check the box for enabled.
3. If you wish to charge for the service, enter the rate per month.
4. Select the department the charges will be sent to.
5. Below Type, select **Mail notifications**.
6. Click **OK** to save.

### 3. Enable the service. Choose **Mail Notifications** on the left.



**Mailbox Manager Settings**

**Mail & Package Notifications**

Associated service option

Email notification

New service options can be created from the Service Options tab.

Notifications generated by

PostalMate Package Receiving

Email notifications will be sent for packages logged through the package receiving feature.

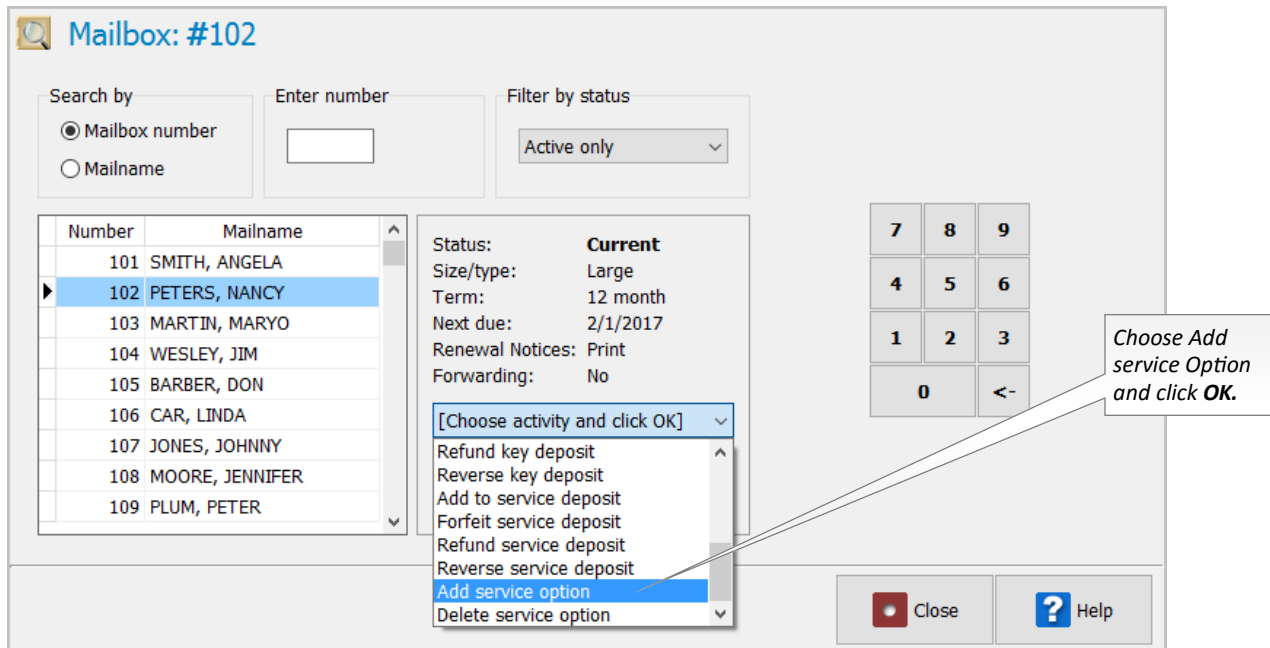
Select the service you added in step 2 here.

Choose PostalMate Package Receiving here.

OK Cancel Help

## Setup Email Notifications for Package Receiving continued...

4. Add the service to each mailbox who will use the email service.
  - In **Mailbox Manger**, choose **Find Mailbox**
  - Find and highlight the appropriate mailname.
  - Select **Add service option** from the drop-down menu and click **OK**.



**Mailbox: #102**

Search by:  Mailbox number  Mailname

Enter number:

Filter by status: Active only

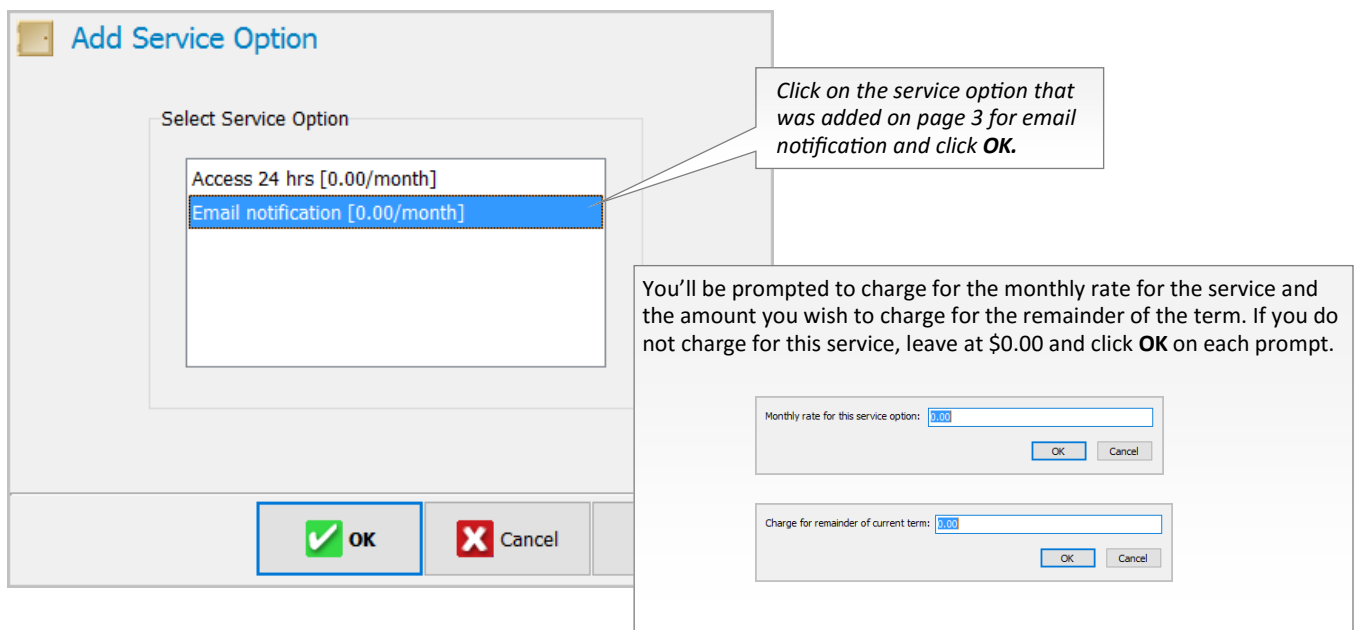
Number	Mailname
101	SMITH, ANGELA
102	PETERS, NANCY
103	MARTIN, MARYO
104	WESLEY, JIM
105	BARBER, DON
106	CAR, LINDA
107	JONES, JOHNNY
108	MOORE, JENNIFER
109	PLUM, PETER

Status: **Current**  
 Size/type: Large  
 Term: 12 month  
 Next due: 2/1/2017  
 Renewal Notices: Print  
 Forwarding: No

[Choose activity and click OK]

- Refund key deposit
- Reverse key deposit
- Add to service deposit
- Forfeit service deposit
- Refund service deposit
- Reverse service deposit
- Add service option**
- Delete service option

Buttons: Close, Help



**Add Service Option**

Select Service Option

- Access 24 hrs [0.00/month]
- Email notification [0.00/month]**

Buttons: OK, Cancel

*Click on the service option that was added on page 3 for email notification and click OK.*

You'll be prompted to charge for the monthly rate for the service and the amount you wish to charge for the remainder of the term. If you do not charge for this service, leave at \$0.00 and click OK on each prompt.

Monthly rate for this service option: 0.00  OK Cancel

Charge for remainder of current term: 0.00  OK Cancel

Setup Email Notifications for Package Receiving continued...

Mail Notifications Box # 102

Customer name  
First:  Last:

Notification method(s)

Email Address:

Text Phone:

**OK** **Cancel** **Help**

*Checkmark **Email** and enter the customer's email address. Click **OK** to save.*

*\*\*Text is not an available option for PostalMate Package Receiving at this time. PMTools and Smart Alert are mail/package receiving software which integrate with Mailbox Manager and do offer text capabilities.\*\**

View or make changes

In Mailbox Manager, choose **Find Mailbox**. Locate the mailbox and choose **View/Edit**. Select the **Mail Notifications** tab.

Edit Mailbox: #102

General Detail Forwarding **Mail Notifications** History

Customer name  
First:  Last:

Notification method(s)

Email Address:

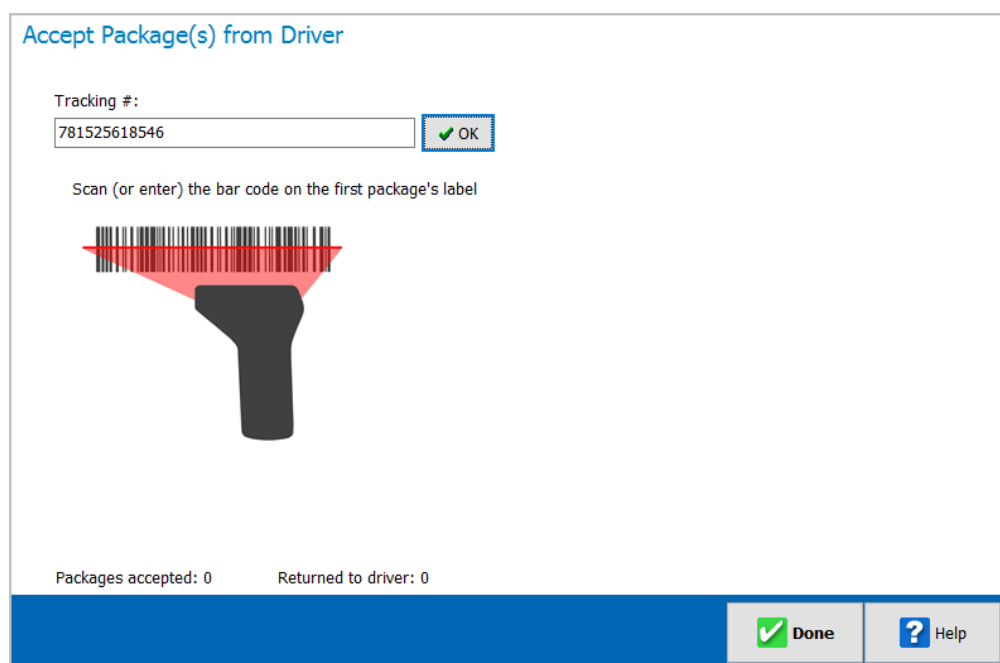
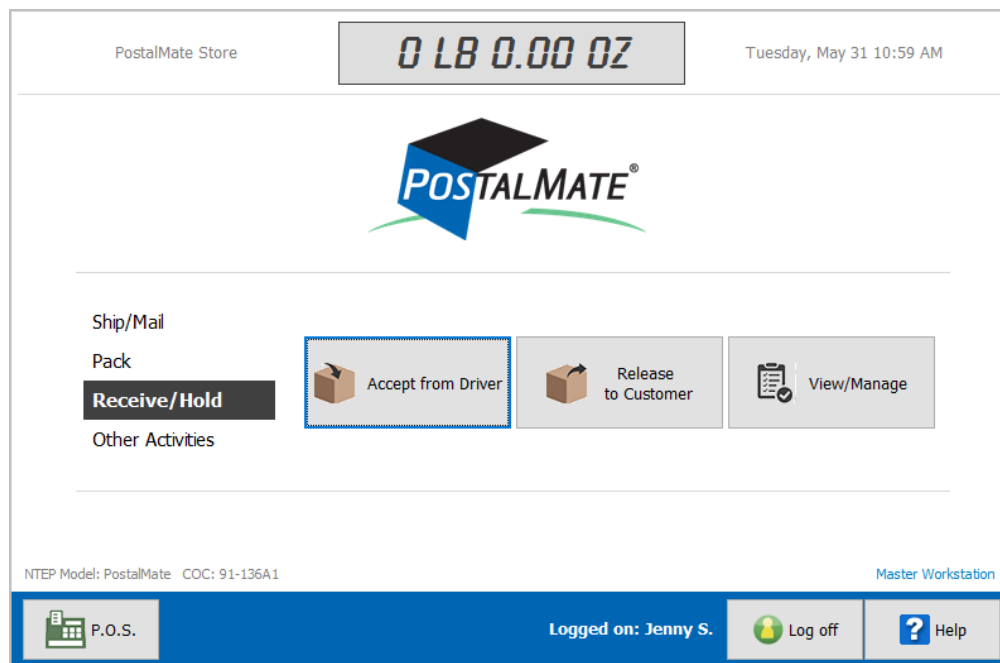
Text Phone:

**OK** **Cancel** **Help**

## Using the Package Receiving feature

### Receiving incoming packages

1. From PostalMate's main screen, select **Receive/Hold** on the left.
2. Click on **Accept from Driver**.
3. For each package either scan the bar code (or enter the tracking number and click **OK**). If PostalMate can't determine the carrier by the tracking number, select it from the list.



**Using the Package Receiving feature continued...**

4. Optionally you can enter additional information. This can be done later if more convenient.
5. If you have ID and/or Mailbox notice labels set to auto-print, the label(s) will print when you scan the next package or click "Done." Otherwise, click the print button(s) when you want the label(s). A Mailbox label is available only when you've linked a mailbox to the package.
6. Click **Done**.

**Accept Package(s) from Driver**

Tracking #:   OK

Tracking #: 9464110200793681562691	ID #: <b>018</b>
Type: Regular Delivery	
Tracking #: 8063196934	ID #: <b>019</b>
Type: Regular Delivery	
Tracking #: 000000000010440	ID #: <b>020</b>
Type: Regular Delivery	

Additional Information **FedEx Ground**

from ID 018

Sender: Amazon

Mailbox #: 102  OK  Email Notification

First/last: NANCY PARK

Notes:

Auto-print labels

Packages accepted: 3    Returned to driver: 0

*Scan all packages received.*

*If you have more than one package for the same mailbox, use the copy button to carry over the info quickly.*

*Enter the mailbox number and click OK. The primary mail name will display.*

*If email notification has been assigned to the mailbox, **Email Notification** will display here. Leave the box checked to send emails automatically.*

*Print out the Package Identification label here.*

*Click here to print a label to place in the mailbox.*

**To enter additional information later in the day:**  
Repeat the Steps 1-2 above, and click on the **Retrieve earlier** button.

**Accept Package(s) from Driver**

Tracking #:   OK

Scan (or enter) the bar code on the first package's label

Packages accepted: 0    Returned to driver: 0

## Releasing packages to customers

1. From PostalMate’s main screen select **Receive/Hold** on the left.
2. Click on **Release to Customer**.
3. You can either look up a package using search criteria, or if you already have it, just scan the bar code on the shipping label.
4. When all packages for the customer have been scanned, click **Next**.
5. Verify the recipient information on the screen and check the appropriate boxes.

### Release Package(s) to Customer

Search by:  Mailbox #:

Scanned

ID #: 006	Tracking #: 00680940013962	Name: NANCY Jones	
<input checked="" type="checkbox"/>	ID #: 009	Tracking #: 42095747947770712345612345678	Name: NANCY Paul
<input checked="" type="checkbox"/>	ID #: 015	Tracking #: 000000000000000	Name: NANCY Paul
<input checked="" type="checkbox"/>	ID #: 020	Tracking #: 0000000000010440	Name: NANCY Paul

Regular Delivery

Package ID: 020 Tracking #: 0000000000010440  
 Named recipient: NANCY Paul  
 Mailbox #: 102

Action:

Notes:

*If the customer refuses the package for any reason, select "Customer rejected pkg..." from the Action list, which will set it up for returning to the carrier.*

Click Next.

### Verify Recipient Information

Verify the following information from the person signing for the package(s).

Recipient Name

Signature from device:

First name/initial and last name:

Check verifications (required)

- Recipient's signature
- Recipient has government-issued photo ID
- If a business, address on ID or bill must match label
- Recipient's ID shows birth date not after 5/3/1995

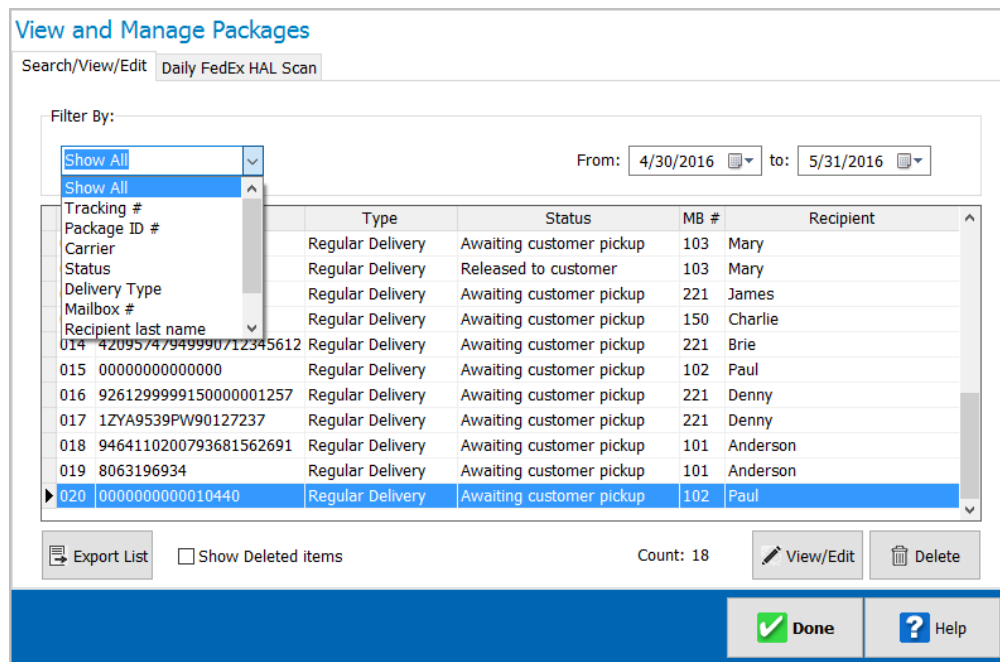
Verify the recipient information on the screen and check the appropriate boxes.

Click Finish.



## Viewing and managing packages

1. From PostalMate’s main screen select **Receive/Hold** on the left.
2. Click on **View/Manage**. All packages entered into the system in the last 30 days will be listed on the screen. Options are:
  - To find specific packages, select/enter filtering criteria..
  - To view or edit information about a package, select it from the list and click **View/Edit**. You can also print labels from here. Click **OK** to save any changes.
  - To export the displayed list of packages to a .csv file, click **Export List**.
3. Click **Done** to close the screen.



## Returning packages to the carrier

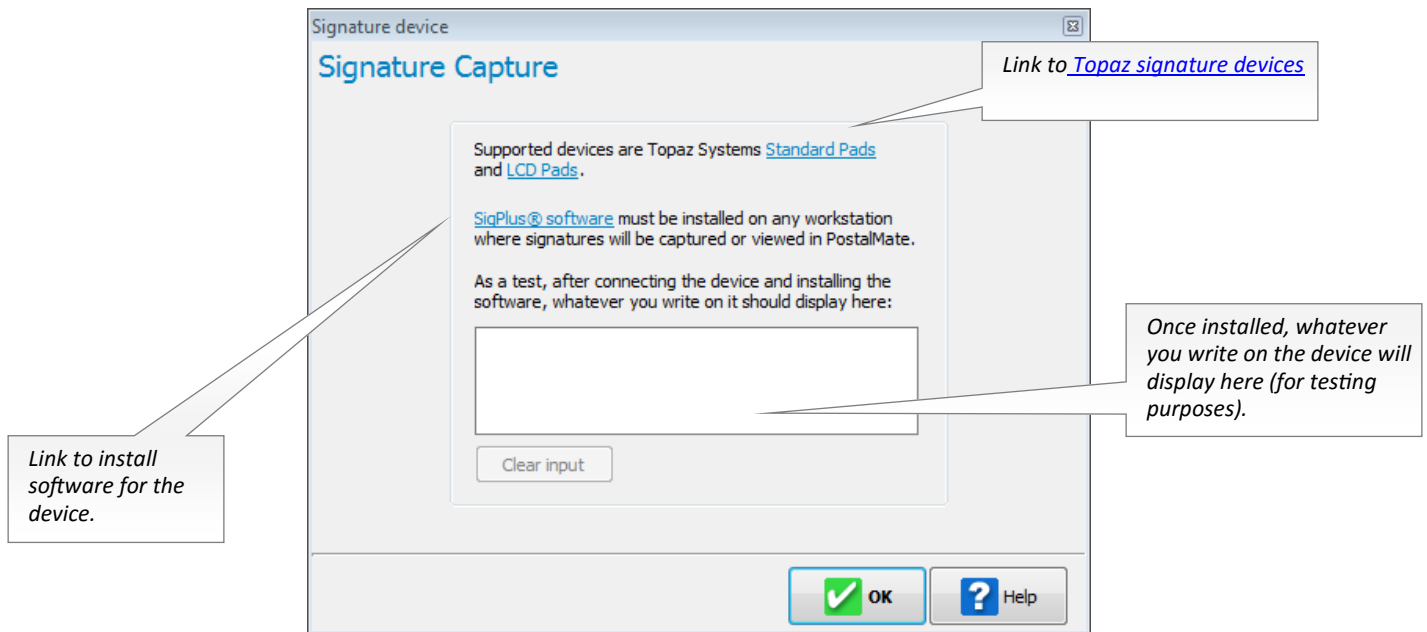
This is done as part of a normal Carrier Pickup.

1. From PostalMate’s main screen select **Other Activities** on the left.
2. Click on **Carrier Pickup**.
3. Select the carrier and click **Next**
4. On the Pickup Schedule screen, click **Next** as usual. If there are any packages set to return, you’ll now see a “Held Package for Return” screen.
5. For each package on the list, either scan the bar code on its shipping label, or check the box next to it (for any that you’re *not* returning at this time, don’t scan or check).
6. Click **Next** and complete the pickup process normally.

You can now give the driver the returned packages, along with any regular shipments.

## Signature Capture

For signature capture, launch **PostalMate System Utilities** and choose **Tools > Signature Capture Device** to see device information and links.



Note: After installing the signature pad driver, you may need to close **PM Utilities**, and re-open and go back to **Tools > Signature Capture Device** to test the device.