

Shipsurance Setup



TechNote #113. Rev. 12.18.2013

Shipsurance rates are included and maintained in PostalMate. Once the basic setup is complete, your alternate insurance activity will be uploaded daily to Shipsurance when performing your daily carrier pickup in PostalMate. You will not need to fax your monthly report to Shipsurance!

Alternate Insurance Setup

Setting up Shipsurance as your alternate insurance carrier can be done quickly in three easy steps.

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

| PostalMate Settings | | | |
|--|--|--|--|
| PostalMate Sett | ings | | 3. Set wholesale and retail |
| Introduction Store Information Store Group DHL Setup DHL Global Mail Setup FedEx Express Setup FedEx Ground Setup UPS Setup USPS Setup Set Shipping Rates Add-On Rates Surcharge Rates Insurance Settings Drop-Off Settings Pro Pack Settings Sales Tax Settings Departments & Products Customer Settings Scale Settings Label Settings Station Settings | Insurance Settings Global rate-setting 1. Add a 50 % margin or 100 % markup 2. Check which rate group(s) to apply the above to: > > > > > > > > > > > > > > > > > > > UPS > USPS 3. V Apply & Save 4. Repeat steps 1-3 as desired for any set of services | Advanced rate-setting Set rates individually Alternate Insurance* setup Companies and rate groups Map services to coverage Use Endicia Insurance non *Replaces carrier-provided coverage; also known as "3rd-party" insurance | rates. See page 3. 1. Setup Shipsurance log-in credentials. See page 2. 2. Set Shipsurance as your default coverage to all applicable services. |
| Show hints | Back | Next Close Help | See page 2. |



1. Companies and rate groups

- Choose the button *Companies and rate groups.*
- Select Shipsurance and choose Edit.
- Verify the box "**Enabled**" is checked.
- Enter your Shipsurance policy number and email address you use with Shipsurance and click *Verify*.
- Once your credentials are verified, click *OK* to save your changes.
- Close the *Alternate Insurance Company* screen.

| | te Insurance Company Insurance Company: Ship | surance | | The Rate Groups for Shipsurance non-USPS and |
|---|---|---|--------|--|
| Reference Name: Shipsurance Policy #: Email*: | Shipsurance | Rate Groups Shipsurance non-USPS Shipsurance USPS | Edit | Shipsurance USPS should not be edited unless you are directed to make changes by either Shipsurance or PC Synergy. |
| | | Ск | Cancel | Ī |

2. Map Services to Coverage

- Choose the *Map services to coverage* button.
- Select the box to "Apply automatic mapping of insurance for Shipsurance or RS Package Insurance".
- Select the option to "Apply proper Shipsurance Mapping to all applicable services". Click OK and then click Yes on the warning message.

| Warning | This will clear any existing Alternate Insurance mapping that you may have previously set, and this action cannot be undone. Would you like to proceeed? |
|---------|--|
| | Yes No |

• Click **OK** to save your settings.

| Tech Note | Shipsurance Setup |
|-----------------------|---|
| | Map Shipping Services to Insurance Converge |
| | Map Services to Insurance Coverage If you use Alternate (3rd party) Insurance, this is where you assign a rate group to each service. Select one or more services, then choose the desired coverage from the drop-down list on the right. |
| | Carrier Service Default coverage |
| | DHL Express Worldwide Shipsurance non-USPS |
| | DHL Express Worldwide Letter Shipsurance non-USPS .surance mapping |
| | DHL GM Smartmail Parcel Shipsurance USPS |
| | DHL GM Smartmail Parcel Plus Shipsurance USPS .ct an option |
| | FedEx 2Day Shipsurance non-USPS |
| | FedEx 2Day A.M. Shipsurance non-USP Apply proper Shipsurance mapping to all applicable services |
| Select this button to | FedEx 2Day A.M. Envelope Shipsurance non-US' |
| automatically act | FedEx 2Day A.M. Envelope [AK/HI origin] Shipsurance non-US |
| automatically set | FedEx 2Day A.M. [AK/HI origin] Shipsurance non-US |
| Shipsurance as the | FedEx 2Day A.M. [AK] Shipsurance non-US / Apply proper RS Package Insurance mapping to all applicable services |
| default provider for | FedEx 2Day A.M. [AK] Envelope Shipsurance non-USF |
| 5 1 5 | FedEx 2Day AK/HI Shipsurance non-USPS |
| all applicable | FedEx 2Day [AK/HI origin] Shipsurance non-USPS |
| services. | Apply automatic mapping of insurance for Shipsurance or RS Package Insur |
| | OK Cancel Pelp |

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3. Rate setting

Use Advanced Rate Setting to verify and make any necessary changes your wholesale rates and to set your retail rates.

- On the Insurance Settings screen, choose the button next to Set rates individually. •
- Select Shipsurance from drop-down under Company.
- For each Rate Group, verify the Wholesale per DVU amount and make any changes based • on your contracted rates from Shipsurance.
- Enter a *Retail Per DVU* for each rate group. •
- Choose Save once your rates are set. Close the Edit Insurance Rates screen when finished. •

| | Edit Insurance Rates by Group | |
|-------------------------------|---|-------------|
| | Edit Insurance Rates | |
| | Company Rate Group | |
| | Shipsurance USPS | |
| | Shipsurance non-USPS Shipsurance USPS | |
| | From To Wholesale Per DVU* Wholesale Flat Amount Retail Per DVU* Retail | Flat Amount |
| | \$0.01 \$1,000.00 \$0.35 \$0.00 \$0.70 | \$0.00 |
| The \$.35 wholesale rate | | |
| displayed here is an example | | |
| only. Verify with your | | |
| Shipsurance policy to enter | *DVU = Declared Value Unit, which is often, but not always, \$100 | e 🗙 Cancel |
| your actual wholesale rate. | | |
| | | Close Help |



Insuring Drop-Off packages (optional)

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

| Introduction Store Information | Trop-Off Settings | | |
|------------------------------------|---|--|-----------------------|
| itore Group HL Setup | | | For Insurance, select |
| HL Setup HL Global Mail Setup | Carrier-specific settings | Add-Ons and Insurance | |
| edEx Express Setup | Service: None | Description Enabled Retail | Shipsurance from th |
| edEx Express Setup | Service. None | I Email notification V \$0.00 | 📙 drop-down menu an |
| SO Setup | Compensation: 0.00 (carrier pays store) | Taping and sealing 🖉 \$0.00 👻 | |
| JPS Setup | Retail charge: 0,00 | Insurance: Shipsurance | click Save . |
| | Retail charge: 0.00 | | |
| JSPS Setup | Department: | Receipt | - |
| Set Shipping Rates Add-On Rates | | Store disclaimer: | |
| | | Store drop-off disclaimer | |
| Surcharge Rates | | | |
| insurance Settings | | | |
| Drop-Off Settings | | | |
| Pro Pack Settings | | | |
| ales Tax Settings | | Printer: Copies | |
| Departments & Products | | Receipt Printer | |
| Customer Settings | | ······································ | |
| Scale Settings | | | |
| abel Settings | | | |
| Station Settings | | Save 🔀 Cancel | |

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 at the time of carrier pickup.

| | PostalMate Shipping System • Edit Reports Tools Help | |
|--|---|--|
| Note: Make sure to follow your Shipsurance coverage terms and conditions when insuring drop-offs. If you have an questions about insuring drop-offs, please contact Shipsurance. | Scan or enter tracking # Image: Ima | Customer, Ship To and Contents are required to add Shipsurance to a drop-off. |
| | | |

TechNote Shipsurance Setup

Reporting

Shipsurance will get a daily upload with specific insurance information when you perform your daily carrier pickups for each carrier. The daily upload will include date, package ID, tracking number, alternate identifier, zip, carrier and service, declared value, alternate declared value and premium amount.

Use the Alternate Insurance report to view/print a log of Shipsurance transactions by date range .This report is located under *Reports > Shipping > Alternate Insurance*. All alternate insurance information is uploaded to Shipsurance with your carrier pickup and no monthly report needs to be faxed, unless requested by Shipsurance.

| | Alternate Insurance Report | × |
|----------------------------|--|---|
| | Company | |
| | Shipsurance | |
| Depending on when you | | |
| updated to 8.5, you may | Date range | |
| need to fax the alternate | From: 8/ 1/2013 🛛 🔽 To: 8/31/2013 | |
| insurance report to | | J |
| Shipsurance to include the | | |
| first of the month through | Egacy data only (report on transactions recorded prior to version 8.5) | |
| the date you updated. | Close Pelp | , |

Using Shipsurance

PostalMate will allocate the "free" insurance to the carrier when applicable. As needed, you can allocate all of the declared value to carrier insurance.

| IPS, the UPS Shield trademark, the UPS Ready mark, th ackage Details | e UPS Developer Kit mark and the Color Br | rown are trademarks of United Parcel Service of America, Inc. All Rigurds all service charges | hts Reserve |
|--|--|---|-------------|
| Shipped via: UPS 2nd Day Air® Expected arrival: Tue 12/17 by end o Declared value: \$600.00 Tracking #: To be Generated | | Add-Ons More Add-Ons Choose Add-Ons: Signature Options | |
| [User Defined]: Ship To: PC Synergy | Package charges Base Amt: \$35.47 Declared value: \$3.50 | C.O.D. Carbon Neutral | |
| 804 N Twin Oaks Valley Rd Suite 122 SAN MARCOS, CA 92069 USA | Add-Ons: \$0.00 ProPack: \$0.00 Materials: \$0.00 \$0.00 Sales Tax: \$0.00 | Shipper Release | |
|] | Total: \$38.97 Contents: | | |



Note to those that added Shipsurance prior to version 8.5

If you added and alternate insurance carrier for Shipsurance prior to version 8.5, this will display as a carrier in brackets however it was named prior to the update (i.e. [Shipsurance]). It is recommended that you disable this user-added insurance carrier, and use the instructions in this TechNote to configure Shipsurance.

