

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.

The screenshot shows the 'PostalMate Settings' window with the 'Insurance Settings' section selected in the left-hand navigation pane. The main content area is titled 'Insurance Settings' and contains the following sections:

- Global rate-setting:**
 1. Add a % margin or % markup
 2. Check which rate group(s) to apply the above to:
 - DHL
 - DHL Global Mail
 - Endicia
 - FedEx
 - Shipsurance
 - UPS
 - USPS
 3. Apply & Save
 4. Repeat steps 1-3 as desired for any set of services
- Advanced rate-setting:**
 -
- Alternate Insurance* setup:**
 -
 -
 - Use Endicia Insurance for rates

*Replaces carrier-provided coverage; also known as "3rd-party" insurance

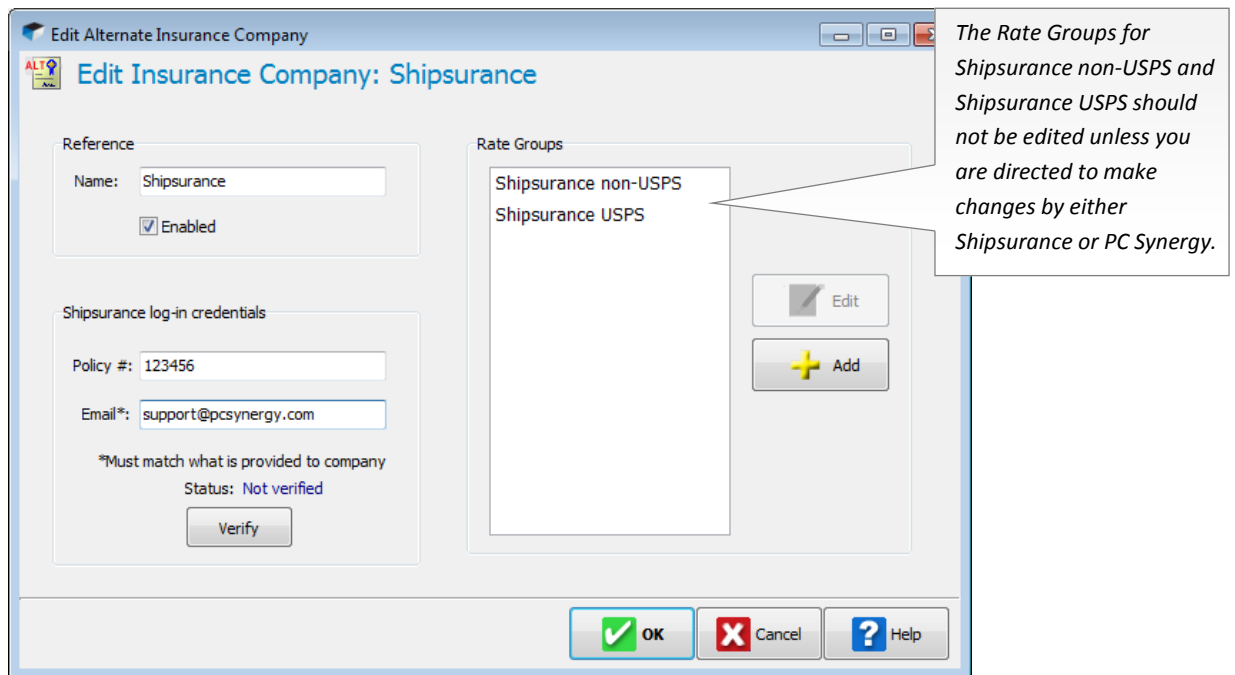
At the bottom of the window are buttons for 'Save', 'Cancel', 'Back', 'Next', 'Close', and 'Help'. A 'Show hints' checkbox is located in the bottom left corner.

Three callout boxes provide instructions for the steps shown in the interface:

- Callout 1:** Points to the 'Companies and rate groups' button. Text: "1. Setup Shipsurance log-in credentials. See page 2."
- Callout 2:** Points to the 'Map services to coverage' button. Text: "2. Set Shipsurance as your default coverage to all applicable services. See page 2."
- Callout 3:** Points to the 'Set rates individually' button. Text: "3. Set wholesale and retail rates. See page 3."

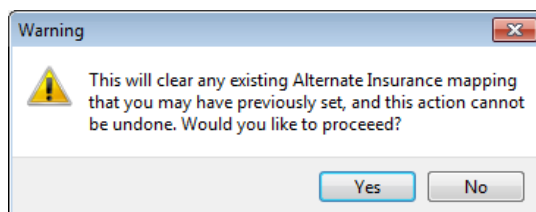
1. Companies and rate groups

- 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.

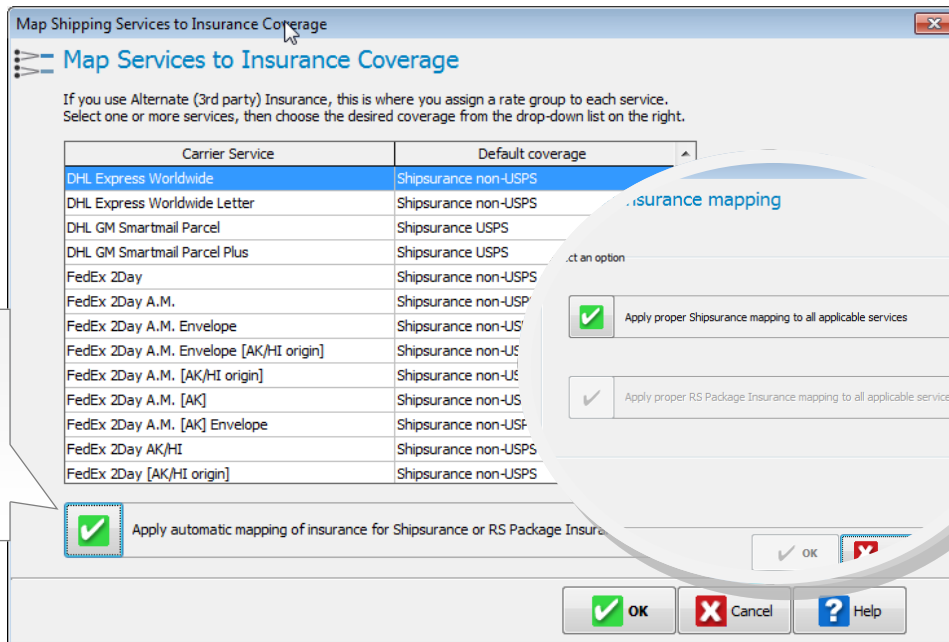


2. Map Services to Coverage

- 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.



- Click **OK** to save your settings.

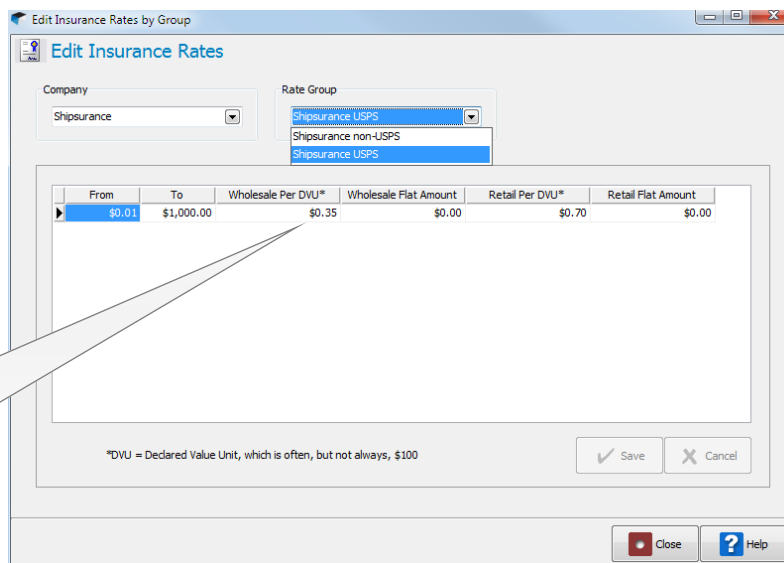


Select this button to automatically set Shipsurance as the default provider for all applicable services.

3. Rate setting

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

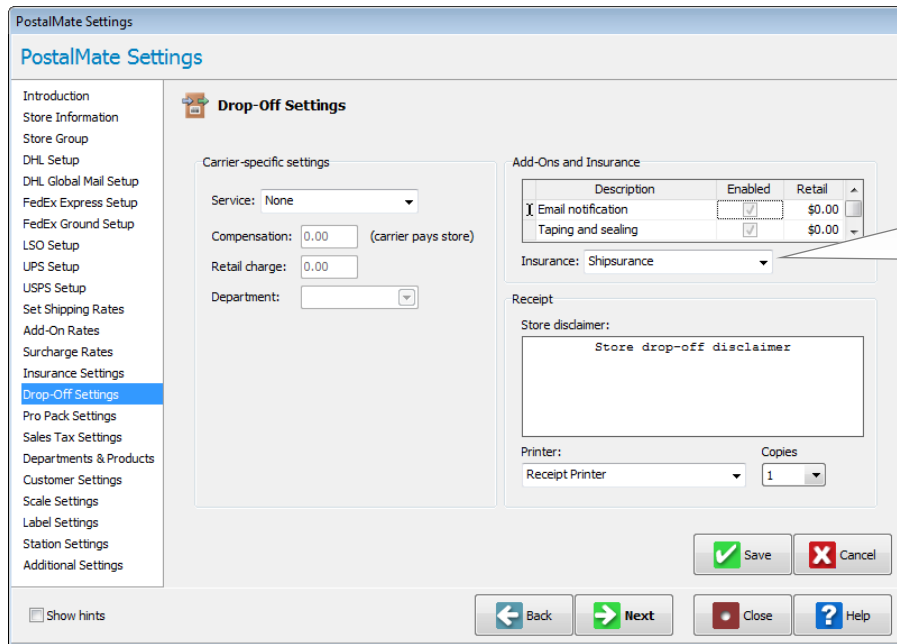
- On the **Insurance Settings** screen, choose the button next to **Set rates individually**.
- Select **Shipsurance** from drop-down under **Company**.
- For each Rate Group, verify the **Wholesale per DVU** amount and make any changes based on your contracted rates from Shipsurance.
- Enter a **Retail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



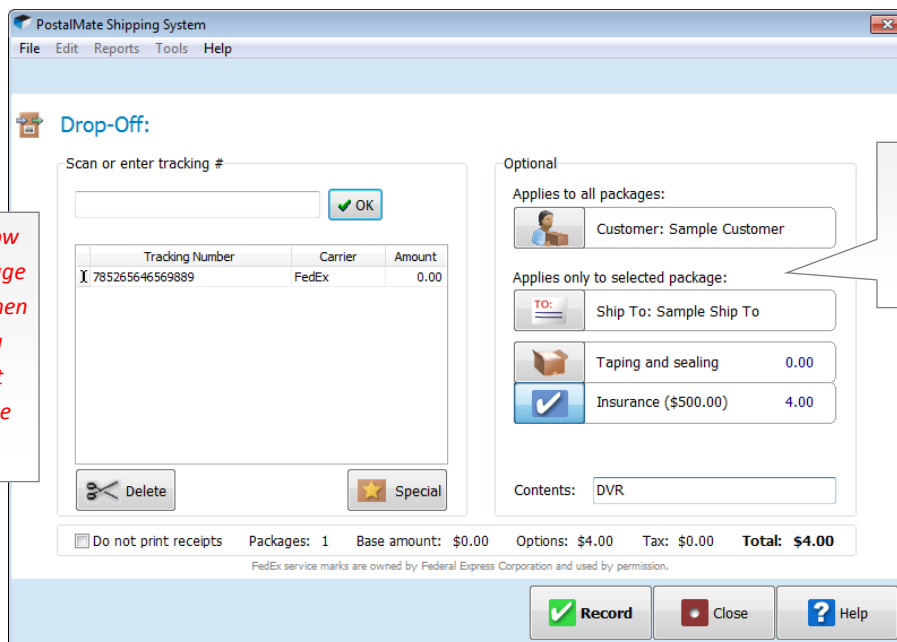
The \$.35 wholesale rate displayed here is an example only. **Verify** with your Shipsurance policy to enter your actual wholesale rate.

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**.



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.



Note: Make sure to follow your Shipsurance coverage terms and conditions when insuring drop-offs. If you have any questions about insuring drop-offs, please contact Shipsurance.

Customer, Ship To and Contents are required to add Shipsurance to a drop-off.

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.

Depending on when you updated to 8.5, you may need to fax the alternate insurance report to Shipsurance to include the first of the month through the date you updated.

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.

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.

