

**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. <b>Verify</b> 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 <b>Save</b> .
	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.

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## 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.

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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.

