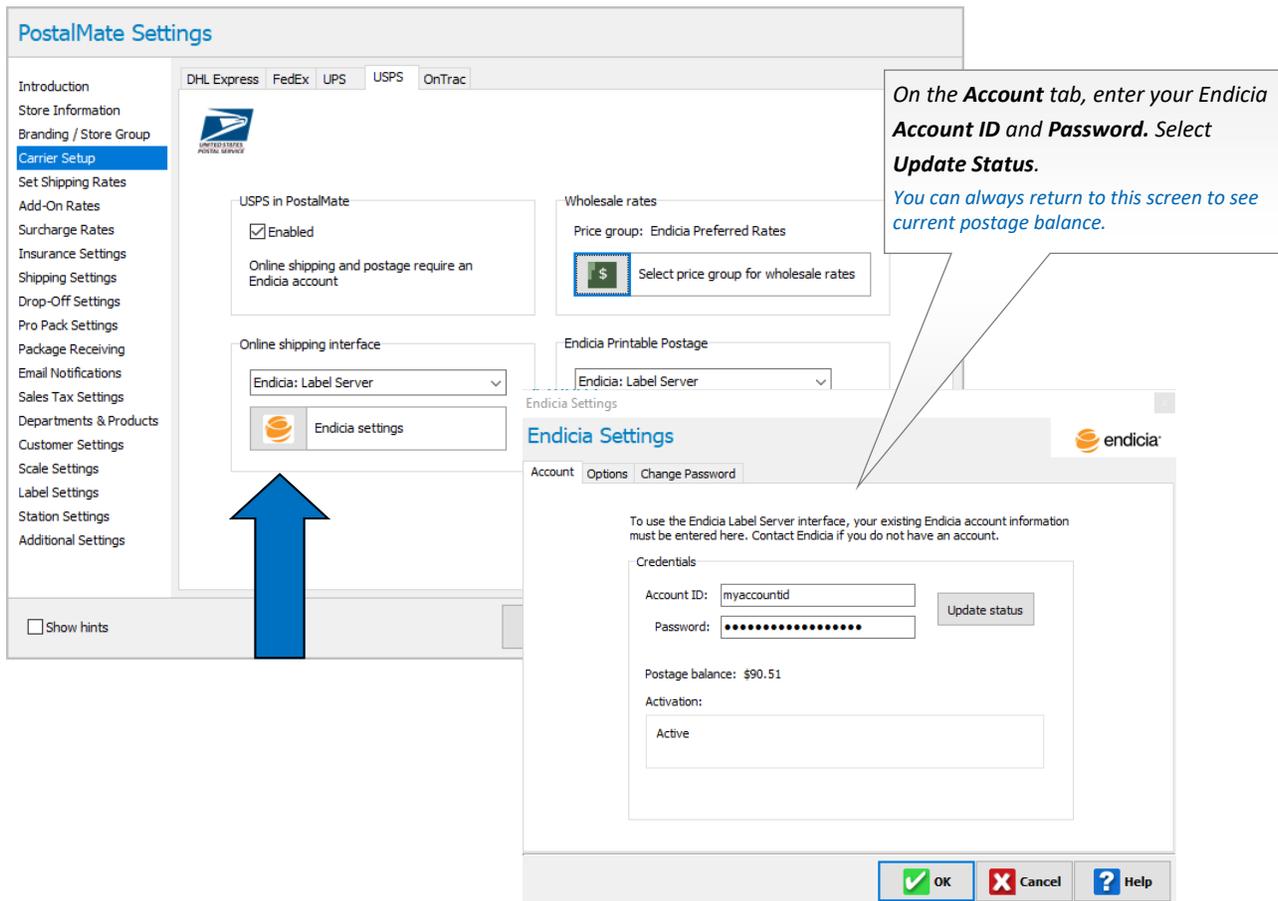## Establish a new Endica postage account

1. Go to bit.ly/USPSPrefRates  Click on **Sign Up Now.**
2. Follow the instructions on the Endicia website for setting up an Endicia Label Server account and adding funds to the account. Make note of your Endicia Account ID and Password in the setup process. You'll need this information for the next step.

> *You will get a 60 day free trial using this link (even though the page shows 4-weeks).*

## Set up Endicia Label Server (ELS) In PostalMate:

*(USPS Setup settings only need to be completed on a Main or Standalone station.)*

1. Choose **Tools > PostalMate Settings > Carrier Setup > USPS**

2. Below online shipping interface, select **Endicia: Label Server**

3. Choose the **Endicia settings** button.



> *On the **Account** tab, enter your Endicia **Account ID** and **Password.** Select **Update Status**.*
> *You can always return to this screen to see current postage balance.*

4.  Enter your Account ID and Passphrase on the **Account tab**. Select **Update Status**.

5.  Choose the **Options** tab.

    - Select transaction options desired. (Remember to un-check **Test mode** when you are ready to use real postage.)

    - Select **USPS Tracking pre-selected** preference.

    - Select your defaults for **Postage Buying** options .
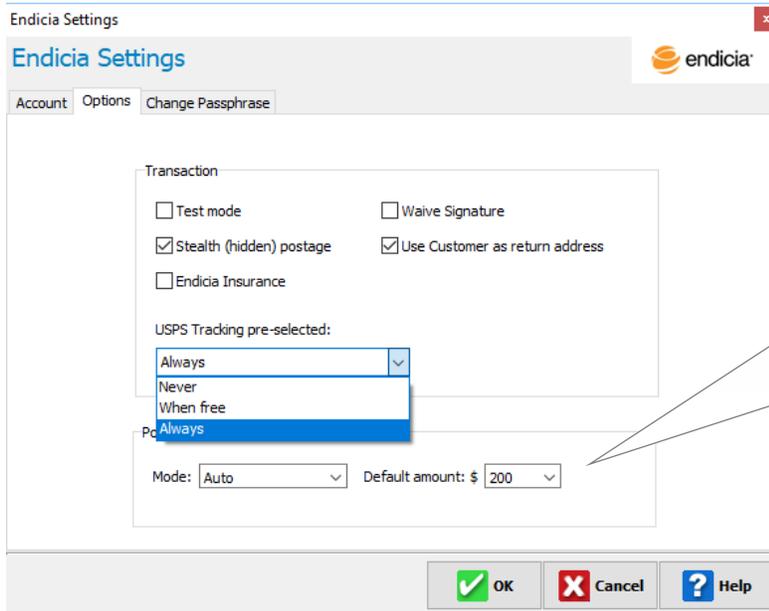
Postage buy modes:

**Manual Only** = You will be required to manually add postage when postage balance is low.

**Prompt** = You'll be prompted to purchase postage during a transaction, when postage balance is low.

**Auto** = Postage will be purchased automatically during a transaction, when postage balance is low.

6.  **Change Passphrase** tab:  Use this option *only* when you need to update your Endicia login passphrase.
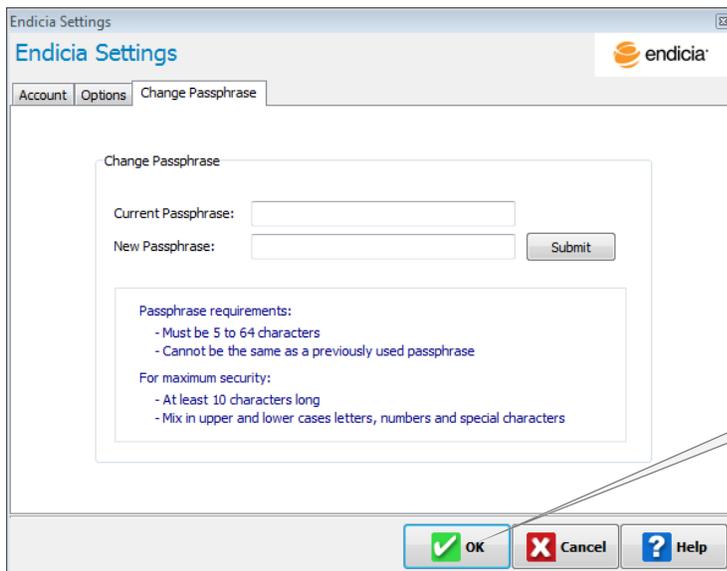
*Click **OK** to Save your settings.*

7. Select your wholesale price group:  On the **USPS** tab, click the button below **Wholesale rates**.  Select **Endicia Preferred rates**.



Click here to select Endicia Preferred Rates.

Here is where you turn on Printable Postage. This requires a Dymo 400 or 450 label printer, and Dymo stamp stock #30915, to print "stamp" postage. See TechNote titled *Endicia Label Server Printable Postage* for more detailed information.

## Review Shipping Rates

Go to **Set Shipping Rates** if you wish to review (or set) your shipping rates for USPS.



Used the **Advanced rate setting** options for Fixed-rate, Weight-based, and Cubic-rate services as desired.

Use Global rate-setting to quickly set retail rates for USPS.

## Review Shipping Rates continued...

Set retail rates for Endicia Add-ons (on Master workstation only).

Choose **Tools > PostalMate Settings** and select **Add-On Rates**.
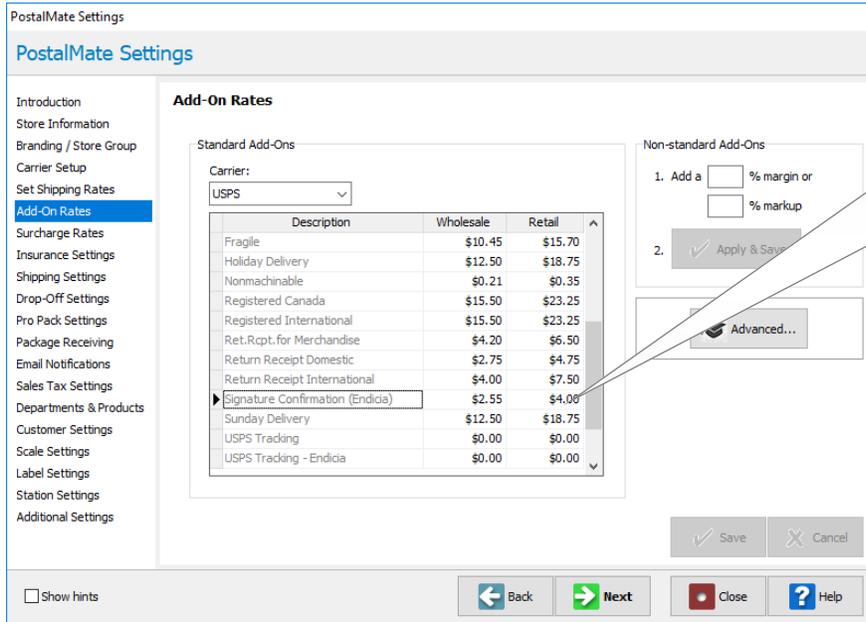


Select USPS below Carrier and enter desired retail rates for the following USPS Add-On's:

- *USPS Tracking—Endicia (free when using Endicia)*
- *Signature Confirmation (Endicia)*

## Service Display for USPS on Rate Comparison

In **PostalMate Settings**, choose **Shipping Settings** on the left pane. Select the **Service Display** tab. Choose which tab you wish for USPS services to show up on that tab you desire.  You may wish for some services to display on a All-Carriers tab, and more to show up the Post Office tab. You may also "hide" some services on another tab.
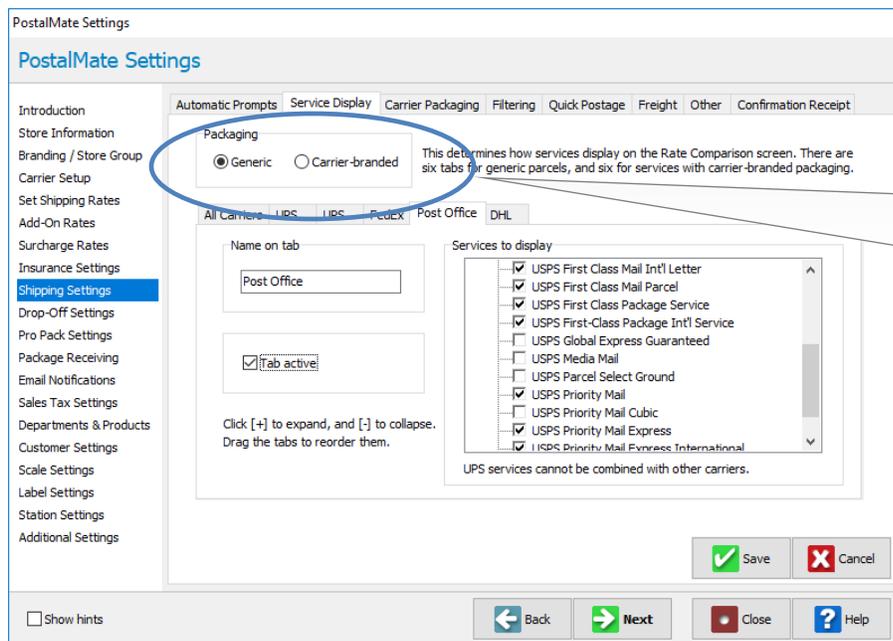


For both **Generic** and **Carrier Branded**, choose the tab you wish for USPS services to display. Click the ">" in front of **United States Postal Service** and checkmark the **USPS services** you wish, then choose **Save**.

## Assign Printers

**Printers need to be assigned on each PostalMate workstation.**

- In **PostalMate Settings**, choose **Label Settings.**

- Scroll down to the bottom of the screen.

- Assign your 4x6 label printer to **USPS Shipper**

  - Select your existing Zebra or UPS printer driver. This will be needed to print some USPS labels such as USPS First Class Mail Certified letters.

  - In some cases a Seagull Zebra driver may be necessary. If First Class Mail Certified prints out as a postage size image on a 4x6 label, you will need this driver. The Seagull Zebra driver can be downloaded from *http://www.seagullscientific.com/aspx/download-free-windows-printer-drivers-for-Zebra.aspx*

- Assign your 8.5 x 11 report printer next to **USPS Shipper w/ Customs**.



## Alternate Insurance for USPS

USPS insurance is **not** available with Endicia Preferred Rates. If you wish to insure USPS over the free insurance value, you will need to use an Alternate Insurer.

*Note: When shipping, it is important to not enter the amount of "free" insurance, as you will receive an error message back from the Endicia servers when finalizing the shipment.*

Click below get information on how to set up any of the following alternate insurance interfaces.

- ♦ Endicia Parcel Insurance

- ♦ Shipsurance

- ♦ RS Insurance

## Package Details

When shipping, live postage will be deducted from your Endicia account. Postage can be purchased at the time of the transaction automatically, by prompt, or manually, depending on how you set up your Postage Buying options (see page 2).

You have additional options to change the mailing date, buy postage or even turn off Endicia for a specific shipment as needed.



*Choose the **Endicia Options** button for more options (see page 7).*

## Package Details Continued…

> *Turning off Endicia Label Server will show published rates for the "A" cost, and the shipment will be processed offline.*
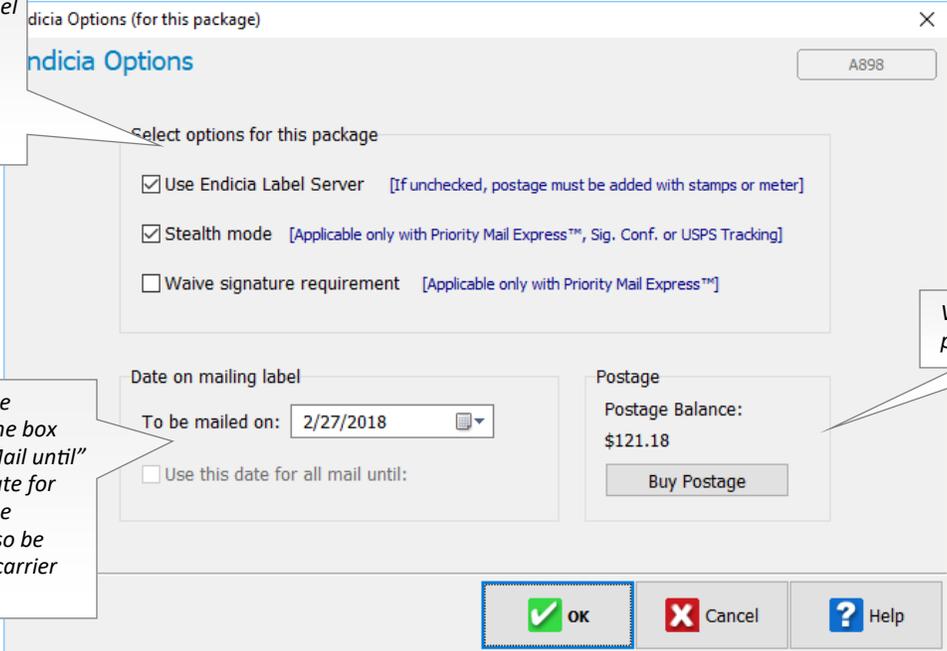
**Endicia Options (for this package)**   ✕

**Endicia Options**                          A898

Select options for this package

☑ Use Endicia Label Server   [If unchecked, postage must be added with stamps or meter]

☑ Stealth mode   [Applicable only with Priority Mail Express™, Sig. Conf. or USPS Tracking]

☐ Waive signature requirement   [Applicable only with Priority Mail Express™]

> *View and purchase postage options.*

> *The mailing date can be changed here. Check the box "Use this date for all Mail until" if you want the mail date for the rest of the day to be advanced. (This can also be done by performing a carrier pickup for USPS.)*

Date on mailing label

To be mailed on:   2/27/2018

☐ Use this date for all mail until:

Postage

Postage Balance:
$121.18

Buy Postage

✓ OK      ✗ Cancel      ? Help

## Void USPS shipments in PostalMate

Refund requests are automatically sent to Endicia when voiding a shipment through PostalMate.

- Shipments must be voided prior to performing your end of day carrier pickup for USPS in PostalMate, or within 30 days of the original printing date.

- If a refund request is needed and the package is not eligible for a refund in PostalMate, you will need to log into your Endicia account at www.endicia.com. From **My Account**, choose **Tools > Request a Postage Refund**.

## Endicia Postage Purchases Report

This report lists Endicia postage purchases made via PostalMate within a specified date range. (It will NOT include purchases made outside of PostalMate.) This report is in the ".csv" format.

**Printing the report**

1. From the PostalMate main menu, go to **Reports > Shipping > Endicia Postage Purchases**.

2. Select a date range and click **OK**.

## Carrier Pickup & USPS Shipment Confirmation Acceptance Notice (SCAN) form

Performing a carrier pickup for USPS in PostalMate will allow you to advance your mailing date for any USPS packages that may go out today, and automatically generate a USPS SCAN form. This form can be scanned by a USPS employee at the time of pickup.

Carrier Pickup

### Pickup Schedule

**Is this your last USPS pickup today?**

| ● Yes | These are the last USPS packages going out today |
| ● No | More USPS packages may go out today |

Choosing yes will set the postmark for any subsequent mailings today to the next mailing day.

*If this is your last USPS carrier pickup today, choose Yes and the postmark for any subsequent mailings today will be postmarked for the next mailing day.*

Carrier Pickup

### Package Count: USPS

Recorded in PostalMate

| Regular: | 2 |
| Drop-Offs: | 0 |
| Return | 0 |
| Total: | 2 |

**Does this match the physical count?**

| ● Yes |
| ● No |

Click No to see a list of packages recorded in

*If you don't want to include all packages on today's SCAN form, choose No .*

*Then, checkmark which packages should be included for the pickup. Multiple pickups are acceptable.*

*You may need to contact Endicia and have them set your account to "manual pickups" for today's shipments to be included on the next day's SCAN form.*

*Note: Endicia imposes an 8:50pm (Pacific) cutoff time for items to be placed on a SCAN form.*

← Back   ✓

*If a SCAN form is available to print with the days carrier pickup, choose OK when the print option displays, and the SCAN form will print to your default report printer.*

**UNITED STATES POSTAL SERVICE.**

**Shipment Confirmation Acceptance Notice**

**A. Mailer Action**

Note To Mailer: The labels and volume associated to this form online, must match the labeled packages being presented to the USPS® employee with this form.

| | |
| Shipment Date: | 2/27/2018 |
| Shipped From: | PC Synergy |
| Name: | PC Synergy |
| Address: | 804 N TWIN OAKS VALLEY |
| City: | SAN MARCOS |
| State: | CA ZIP+4® 92069 |

| Type of Mail | Volume |
| Priority Mail Service® | 3 |
| Priority Mail Express Service®* | 0 |
| International Mail* | 0 |
| Other | 0 |
| Total Volume | 3 |

**TEST ONLY
DO NOT MAIL**

**B. USPS Action**

USPS EMPLOYEE: Please affix upon pickup or receipt of mail. Leave form with customer or in customer mail receptacle

USPS Tracking

94 757 102 007 93000558709

PS Form 5630, November 2008, PSN 7530-08-000-4335

## Endicia ELS Benefits

1.  Additional software is not necessary to install to print USPS Stamps or Labels.
2.  To print USPS stamps, a Dymo label printer is required.
4.  Postage buying options for Endicia shipments.  Set your defaults to **Manual Only**, **Prompt,** or **Auto buy** and set the default amount of how much you wish to buy.
5.  Voiding USPS shipments in PostalMate will automatically send  a Postage Refund request to Endicia.  Remember the refunds are not automatic and may take up to two weeks to be applied to your Endicia account.
6.  IMbp tracking numbers will not display as a tracking number in PostalMate on the Ship Info label, POS receipt or email notification.
7.  Shipments that include add-on's such as USPS Tracking and signature confirmation will be available for   tracking in PostalMate's **Find Package** screen.
8.  USPS SCAN Form:  The Shipment Confirmation Acceptance Notice form will automatically print when performing a carrier pickup for USPS in PostalMate.
9.  Certified Mail can be processed through the **Ship a Package** screen and the label will included the certified information in the tracking number. No need to use certified stickers.

## Endicia ELS Restrictions

1.  Endicia Label Server does not support Registered Mail (ELS may be turned off on the **Review & Confirm** screen and Registered Mail will be available to perform offline).

# FAQ's for Endicia Preferred Rates

1.  Discounts are best on Priority Mail weight based and cubic rate services.

2.  You receive a 3 cent discount on a first class stamp (using a Dymo label printer).

3.  You can mail First Class International Flat through Endicia's GAP program.

4.  Priority Mail includes $100 free insurance.  Express Mail envelope includes $100 free insurance. Express Mail packages includes $200 free insurance. *You must leave the declared value field in PostalMate blank to get the free insurance.*

5.  You may not use USPS insurance above what has been listed in this document. You may use Endicia Parcel Insurance or other third party insurance to cover additional amounts or other USPS services.

6.  You may use USPS Priority Mail Cubic pricing for qualifying boxes and soft packs (envelopes).

7.  You probably should never select cubic rate pricing for a box you are mailing.  Usually your regular Priority Mail price will be higher – that is the one you should sell.  It is a great idea to move the cubic rate pricing option to a back tab, where you won't see it unless you need it for a soft pack. Remember, when mailing a box, Endicia will automatically give you the lowest qualifying price (cubic or regular) when selecting Priority Mail. However, if you are mailing a soft pack, you must actually select the soft pack pricing option to get that rate.