

Shipsurance Setup

#113 | Rev. 01.02.24

Shipsurance rates are included and maintained within PostalMate. After completing the initial setup, your alternate insurance activity will be automatically uploaded to Shipsurance every day when you perform your carrier pickup in PostalMate

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

Companies and rate groups

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

The image shows the 'PostalMate Settings' window with the 'Insurance Settings' tab selected. The left sidebar lists various settings categories, with 'Insurance Settings' highlighted. The main area displays 'Global rate-setting' and 'Advanced rate-setting' options. A callout points to the 'Companies and rate groups' button under 'Alternate Insurance* Setup'. Below this, the 'Edit Alternate Insurance Company' dialog box is open, showing the 'Shipsurance' company selected. The 'Reference' section shows 'Name: Shipsurance' and 'Enabled' checked. The 'Shipsurance log-in credentials' section shows 'Policy #: 31193XX' and 'Email*: sales@pcsynergy.com'. A 'Verify' button is present. The 'Rate Groups' section lists 'Shipsurance non-USPS' and 'Shipsurance USPS'. A callout points to these rate groups. At the bottom of the dialog are 'OK', 'Cancel', and 'Help' buttons.

PostalMate Settings

PostalMate Settings

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Departments & Products
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Label Settings
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Additional Settings

☐ Show hints

Insurance Settings

Global rate-setting

1. Add a % margin or % markup

2. Check which rate group(s) to apply the above to:

☐ DHL
☐ Endicia
☐ FedEx
☐ FedEx Freight Box
☐ Shipsurance
☐ UPS
☐ USPS

3. ☒ 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 for USPS
☐ Allocate entire DV to alternate insurer

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

Click here to setup Shipsurance credentials.

Edit Alternate Insurance Company

Edit Insurance Company: Shipsurance

Reference

Name:

☒ Enabled

Shipsurance log-in credentials

Policy #:

Email*:

*Must match what is provided to company

Status: Not verified

Rate Groups

Shipsurance non-USPS
Shipsurance USPS

The Rate Groups for Shipsurance non-USPS and Shipsurance USPS should not be edited unless you are directed to make changes by either Shipsurance or PostalMate.

Enter your Shipsurance credentials and choose Verify.

Map Services to Coverage

Choose the **Map services to coverage** button.

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Advanced rate-setting

Alternate Insurance® setup

☒ Use Endicia Insurance for USPS
☐ Allocate entire DV to alternate insurer

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

☐ Show hints

Select Map services to coverage.

Map Shipping Services to Insurance Coverage

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 12:00	Shipsurance non-USPS
DHL Express Worldwide 12:00 Letter	Shipsurance non-USPS
DHL Express Worldwide Letter	Shipsurance non-USPS
FedEx 2Day	Shipsurance non-USPS
FedEx 2Day A.M.	Shipsurance non-USPS
FedEx 2Day A.M. AK [flat rate]	Shipsurance non-USPS
FedEx 2Day A.M. Envelope	Shipsurance non-USPS
FedEx 2Day A.M. [AK]	Shipsurance non-USPS
FedEx 2Day A.M. [AK] Envelope	Shipsurance non-USPS
FedEx 2Day A.M. [flat rate]	Shipsurance non-USPS
FedEx 2Day AK/HI	Shipsurance non-USPS
FedEx 2Day AK/HI Envelope	Shipsurance non-USPS
FedEx 2Day AK/HI [flat rate]	Shipsurance non-USPS

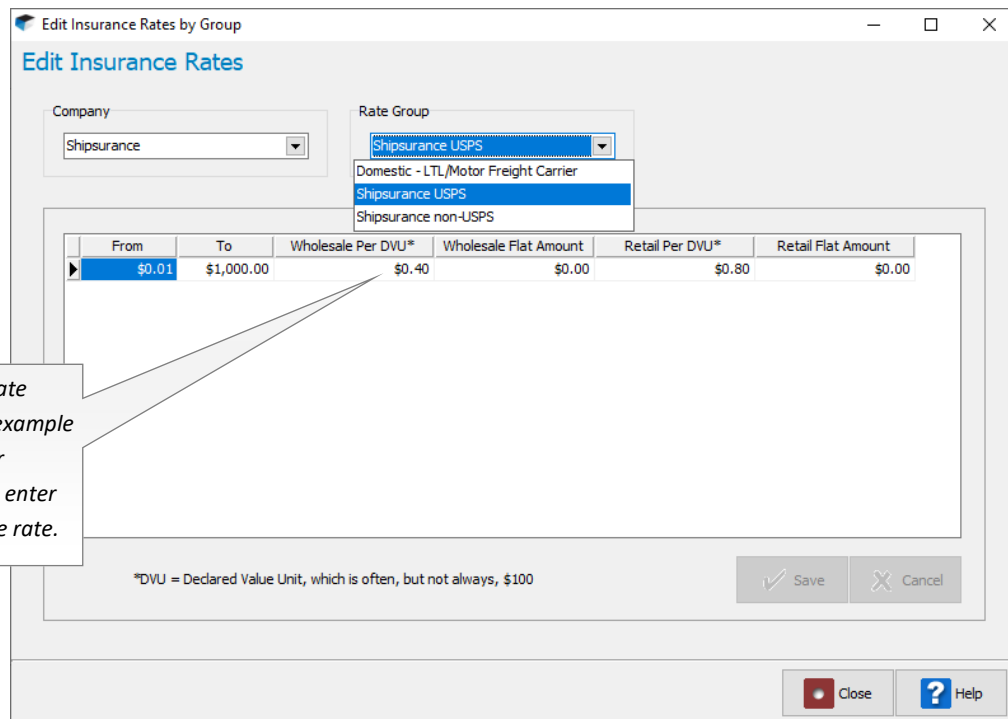
Automatic mapping:

Default Coverage:

1. From the drop-down menu, choose **Shipsurance** and click **Apply**.
2. Choose **Yes** to the warning message asking if you wish to proceed.
3. Click **OK** to save.

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; Shipsurance non-USPS and Shipsurance USPS.
- Choose **Save** once your rates are set. **Close** the **Edit Insurance Rates** screen when finished.



Edit Insurance Rates by Group

Edit Insurance Rates

Company: Shipsurance

Rate Group: Shipsurance USPS

From	To	Wholesale Per DVU*	Wholesale Flat Amount	Retail Per DVU*	Retail Flat Amount
\$0.01	\$1,000.00	\$0.40	\$0.00	\$0.80	\$0.00

*DVU = Declared Value Unit, which is often, but not always, \$100

Save Cancel Close Help

The \$.40 wholesale rate displayed here is an example only. **Verify** with your Shipsurance policy to enter your actual wholesale rate.

Shipsurance Settings for Drop-Offs (Optional)

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

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Carrier-specific settings Receipt Add-ons and Insurance

Add-Ons and Insurance

Description	Enabled	Retail
Email notification	<input checked="" type="checkbox"/>	\$0.00
Taping and sealing	<input checked="" type="checkbox"/>	\$0.00

Insurance:
Shipsurance

Save Cancel

Show hints Back Next Close Help

For Insurance, 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.

PostalMate Shipping System

File Edit Reports Tools Help

Drop-Off:

Scan or enter tracking #

Tracking Number Carrier Amount
7898598989898 FedEx 0.00

Optional

Applies to all packages:
Customer: SANDY SMITH

Applies only to selected package:
Ship To: RETURNS
Taping and sealing 0.00
Insurance (\$800.00) 6.40

Contents: Iphone

Packages: 1 Base amount: \$0.00 Options: \$6.40 Tax: \$0.00 **Total: \$6.40**

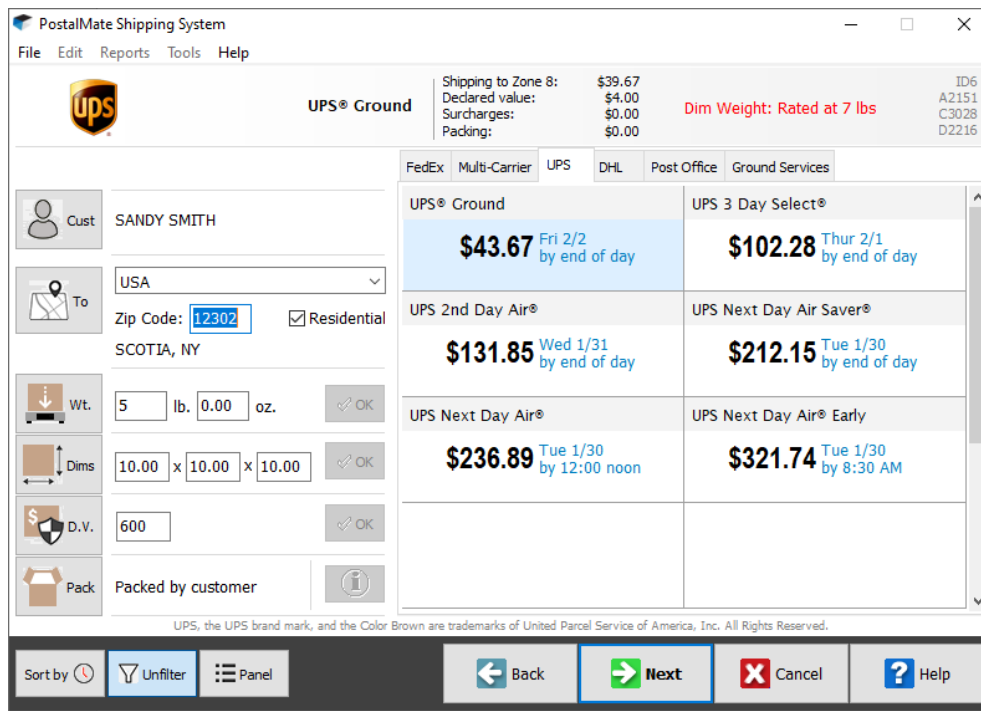
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Record Close Help

Customer, Ship To, and Contents are required.

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.

Once setup is complete, Shipsurance becomes the primary insurance for all applicable services.



PostalMATE Shipping System

File Edit Reports Tools Help

UPS® Ground

Shipping to Zone 8: \$39.67
Declared value: \$4.00
Surcharges: \$0.00
Packing: \$0.00

Dim Weight: Rated at 7 lbs

ID6
A2151
C3028
D2216

Cust: SANDY SMITH

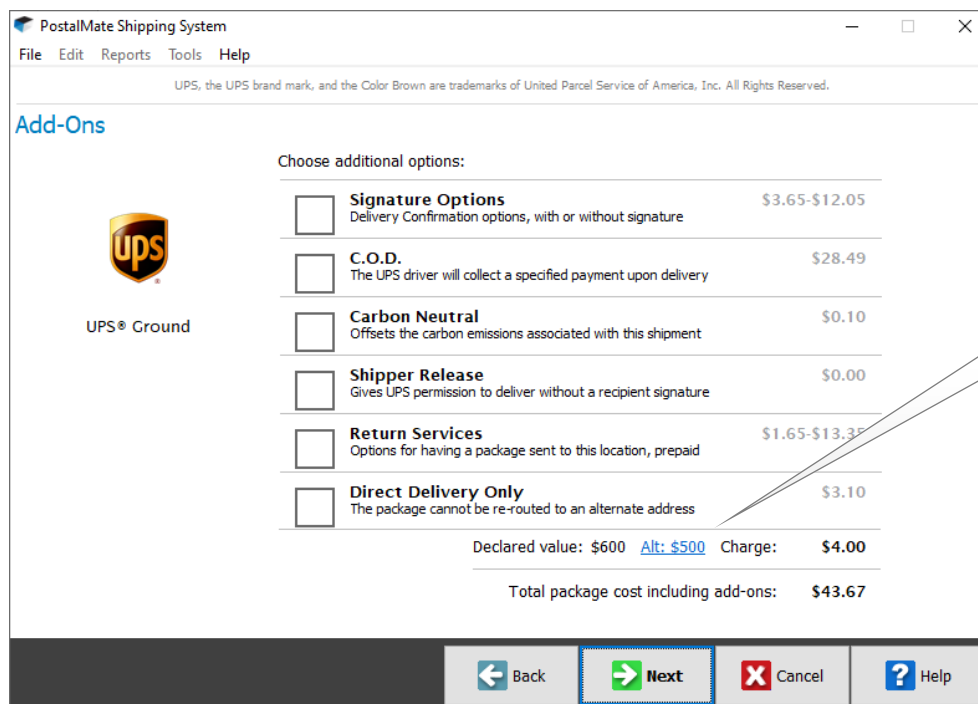
To: USA
Zip Code: 12302 [Residential]
SCOTIA, NY

Wt: 5 lb. 0.00 oz. [OK]
Dims: 10.00 x 10.00 x 10.00 [OK]
D.V.: 600 [OK]
Pack: Packed by customer [OK]

FedEx	Multi-Carrier	UPS	DHL	Post Office	Ground Services
UPS® Ground		UPS 3 Day Select®			
\$43.67 Fri 2/2 by end of day		\$102.28 Thur 2/1 by end of day			
UPS 2nd Day Air®		UPS Next Day Air Saver®			
\$131.85 Wed 1/31 by end of day		\$212.15 Tue 1/30 by end of day			
UPS Next Day Air®		UPS Next Day Air® Early			
\$236.89 Tue 1/30 by 12:00 noon		\$321.74 Tue 1/30 by 8:30 AM			

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Sort by [Clock] [Unfilter] [Panel] [Back] [Next] [Cancel] [Help]



PostalMATE Shipping System

File Edit Reports Tools Help

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Add-Ons

UPS® Ground

Choose additional options:

<input type="checkbox"/>	Signature Options Delivery Confirmation options, with or without signature	\$3.65-\$12.05
<input type="checkbox"/>	C.O.D. The UPS driver will collect a specified payment upon delivery	\$28.49
<input type="checkbox"/>	Carbon Neutral Offsets the carbon emissions associated with this shipment	\$0.10
<input type="checkbox"/>	Shipper Release Gives UPS permission to deliver without a recipient signature	\$0.00
<input type="checkbox"/>	Return Services Options for having a package sent to this location, prepaid	\$1.65-\$13.35
<input type="checkbox"/>	Direct Delivery Only The package cannot be re-routed to an alternate address	\$3.10

Declared value: \$600 Alt: \$500 Charge: \$4.00

Total package cost including add-ons: \$43.67

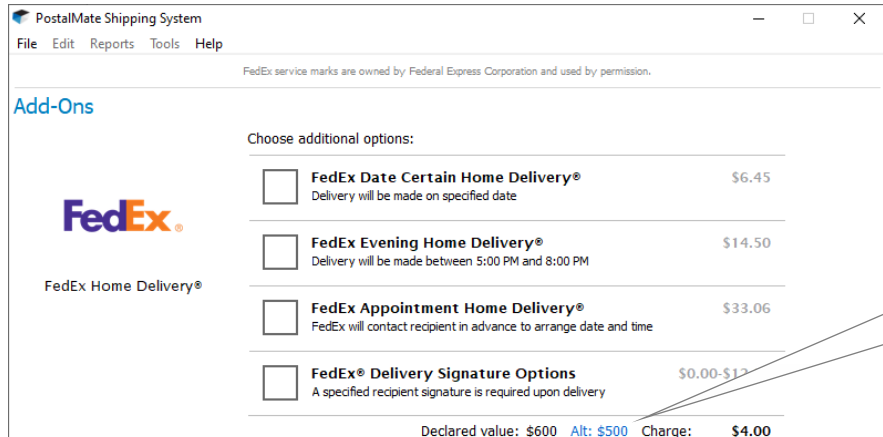
[Back] [Next] [Cancel] [Help]

Easily see here that your insurance is allocated to Shipsurance. .

Allocating Alternate insurance back to Carrier Insurance

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PostalMate allocates the “free” insurance to the carrier when applicable. As needed, you can allocate all of the declared value to carrier insurance.



PostalMate Shipping System

File Edit Reports Tools Help

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Add-Ons

Choose additional options:

<input type="checkbox"/>	FedEx Date Certain Home Delivery® Delivery will be made on specified date	\$6.45
<input type="checkbox"/>	FedEx Evening Home Delivery® Delivery will be made between 5:00 PM and 8:00 PM	\$14.50
<input type="checkbox"/>	FedEx Appointment Home Delivery® FedEx will contact recipient in advance to arrange date and time	\$33.06
<input type="checkbox"/>	FedEx® Delivery Signature Options A specified recipient signature is required upon delivery	\$0.00-\$1.25

Declared value: \$600 [Alt: \\$500](#) Charge: \$4.00

Alternate Insurance

Allocate Declared Value of: \$600

This allows you to override the default of how insurance is split between the primary and alternate providers.

Shipping/Primary Carrier
\$ 600 To FedEx Ground
[\$50,000.00 maximum]

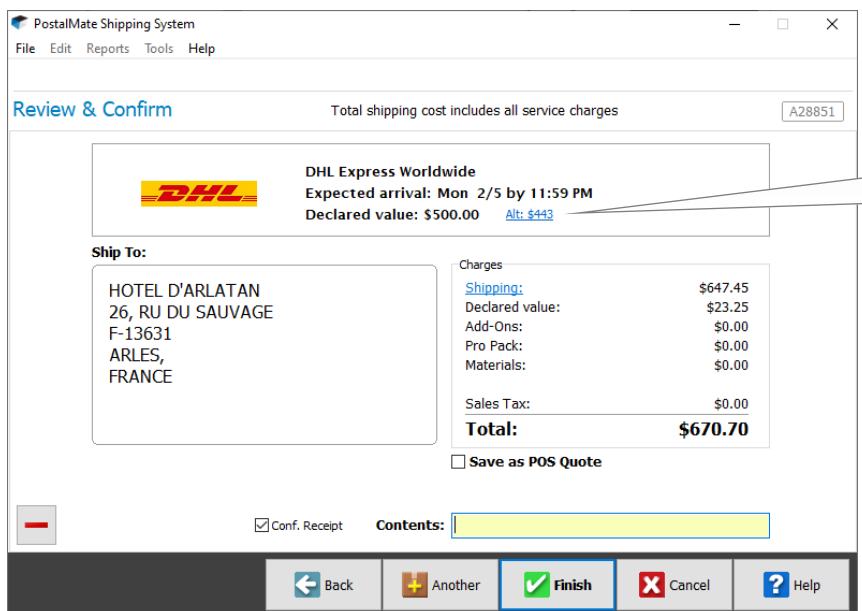
Alternate Provider
\$ 0 To Shipinsurance non-USPS
[\$15,000.00 maximum]

☒ Do not use alternate insurance

OK Cancel Help

To allocate declared value to carrier insurance for a specific shipment, click on the blue “Alt : \$ amount” link.

Then, checkmark the box “Do not use alternate insurance”.



PostalMate Shipping System

File Edit Reports Tools Help

Review & Confirm

Total shipping cost includes all service charges

A28851

DHL Express Worldwide
Expected arrival: Mon 2/5 by 11:59 PM
Declared value: \$500.00 [Alt: \\$443](#)

Ship To:
HOTEL D'ARLATAN
26, RU DU SAUVAGE
F-13631
ARLES,
FRANCE

Charges

Shipping:	\$647.45
Declared value:	\$23.25
Add-Ons:	\$0.00
Pro Pack:	\$0.00
Materials:	\$0.00
Sales Tax:	\$0.00
Total:	\$670.70

☐ Save as POS Quote

☒ Conf. Receipt

Contents:

Back Another Finish Cancel Help

For International shipments, you can change the allocation on the Review & Confirm screen.

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

Carrier: FedEx Ground

Packages are going out for which carrier?

DHL


FedEx Express


FedEx Ground


UPS

USPS

This only lists carriers for which there are currently packages to be picked up.

 **Next**

 **Cancel**

 **Help**

Performing daily Carrier Pickups, for EACH carrier is necessary. This process uploads your insurance information to Shipsurance.

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.