



# Getting Started

## USERS GUIDE





## What is PMTools?

PMTools bolts onto PostalMate with awesome time-saving money making tools.

## About this Users Guide

PMTools is easy to use, we won't waste your time with obvious details.

## Additional Assistance

### **PMTools Misc Tab Help Resources**

Create Help Ticket opens a web based help portal. Complete the form and we'll get started.

Remote Support opens a gateway to log into your machines

Upload Backup is a quick secure way to get us your data to analyze.

### **Getting Support at [www.VSoftwareTools.com](http://www.VSoftwareTools.com)**

Review FAQ's, see known issues and submit Help Tickets.

### **Training Classes**

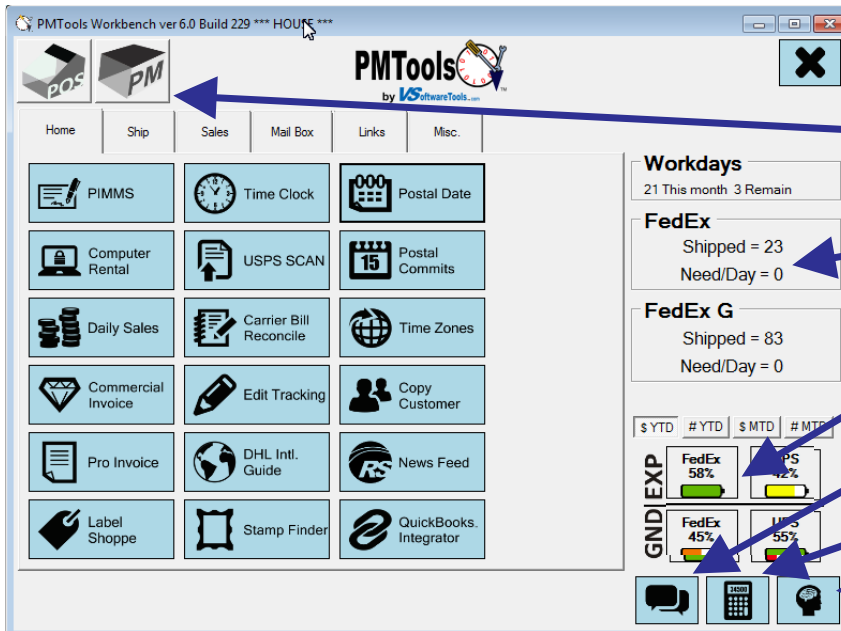
We are available and teach at many regional and national industry events and are also available for additional web meetings via SKYPE or webinars. Contact us for availability.

## Contacting Customer Support

**E-Mail:** [support@vsoftwaretools.com](mailto:support@vsoftwaretools.com)

**Phone:** 800-778-4078

**Fax:** 503-828-9073



Application Switching

FASC Requirements

Carrier Balancing

Chat

Profit/Margin Calc

User Guides



## PMTools

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Getting Started .....	6
Download and Install.....	6
Security Setup.....	6
PIMMS .....	7
Computer Rental .....	7
Daily Sales.....	8
Commercial Invoice .....	8
Pro Invoice.....	9
Label Shoppe .....	9
Time Clock & Manager .....	10
USPS SCAN.....	11
Postal Date .....	11
Postal Commits.....	11
Carrier Bill Reconcile.....	12
Edit Tracking .....	12
DHL International Guide.....	12
Stamp Finder .....	13
Time Zones .....	13
Copy Customer .....	13
RS News Feed .....	13
Email Setup.....	14
Suggestion Box .....	14

# Getting Started

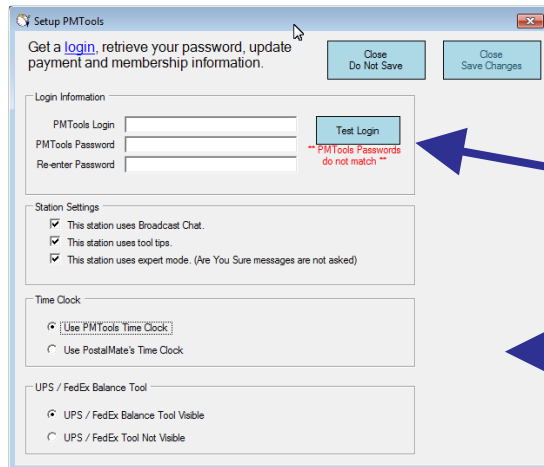
PostalMate 9.9 or higher is required to install PMTools.

## Install PMTools

1. Download your PMTools from VSoftwareTools.com and install it, starting with Master.
2. "Allow" PMTools as an exception if prompted by your AntiVirus or Firewall.
  - A. Repeat the installation steps on all PostalMate workstations.



On Misc Tab

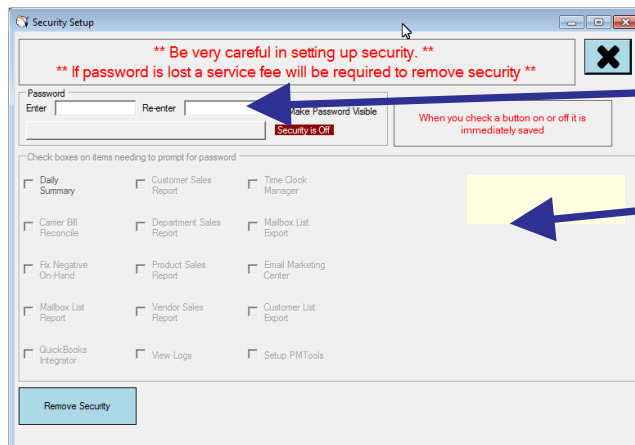


Enter and test your Login

Adjust Station Settings



On Misc Tab



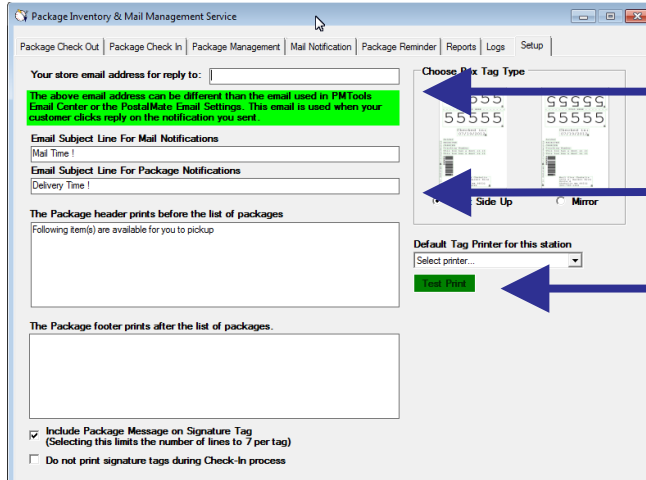
Enter matching Password to activate security

Check the data/tools you want to protect



Misc Tab in PIMMS

PIMMS makes it easy to email / text customers about inbound packages with accurate records and accountability. Get more info at [VSoftwareTools.com](http://VSoftwareTools.com) > User Guides

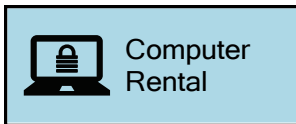


Enter email for customer reply

Adjust subject lines & content

Select and test printer

Click any other tab to save



ezCRT manages computer rental time in your lobby. Get the User Guide at [VSoftwareTools.com](http://VSoftwareTools.com) > User Guides





Daily Sales

Filters  
From: Wednesday, May 20, 2015 To: Saturday, May 23, 2015  
 Exclude Hash

Collecting a large date range may briefly slow PostalMate down.

Date	Total Retail	Total Cost	Count	Avg Receipt \$	Avg GP \$
5/20/2015	431.60	196.12	19	22.72	12.39
5/21/2015	558.12	259.96	31	18.00	9.62
<b>Totals</b>	<b>989.72</b>	<b>456.08</b>	<b>50</b>	-	-
<b>Averages</b>	<b>494.86</b>	<b>228.04</b>	<b>25</b>	<b>20.36</b>	<b>11.01</b>

Select All Copy Selected to Clipboard

Fast Accurate Current Sales



Commercial Invoice

From: 5/18/2015 To: 5/21/2015 Start Another

Tracking	Date/Time	ShipID	Country
78067559	5/18/2015 2:04 PM	120856	CANADA

**EDIT MODE**

Create/Edit Commercial Invoice for Selected Tracking

Customer: Lamy Dean  
Ship To: Rick Peterson

Items Details

#	Qty	Description	Country Mfg	Value ea. (US)	Commodity Code
1	0		USA	0.00	
2	0		USA	0.00	
3	0		USA	0.00	
4	0		USA	0.00	
5	0		USA	0.00	

Check One  
 Gift  Samples  Merchandise  
 Documents  Returns  Other

Signature Line: Lamy Dean  
Remarks:

PO: Ref1: PkgID: 120856  
Ref2: ShipID: 101281

Use "COMMERCIAL"  
 Use "PRO FORMA"  
 Print Blank

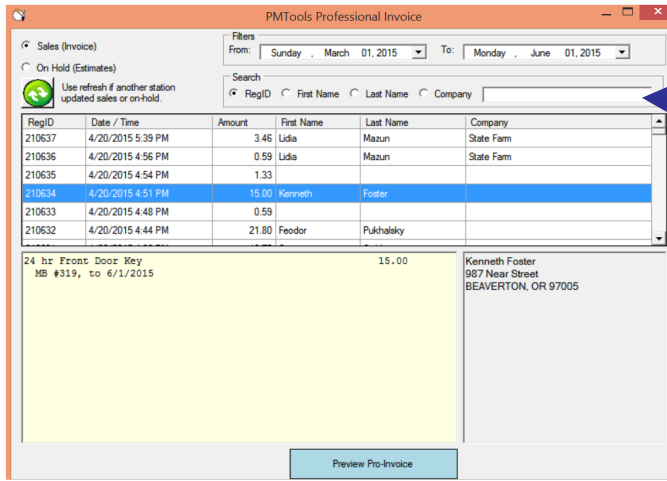
Review/Print Commercial Invoice

Select shipment from PostalMate

Create/Edit Commercial Invoice

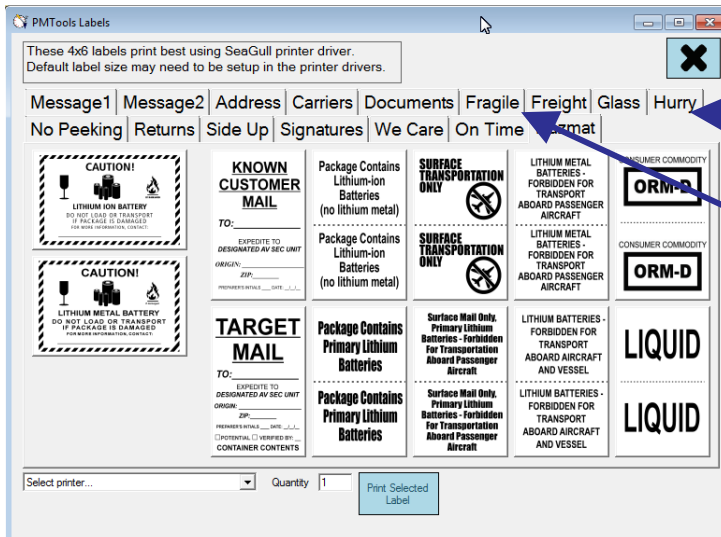
Complete the form





Prints 8 1/2 x 11 Invoices

Save as Word, PDF or Excel

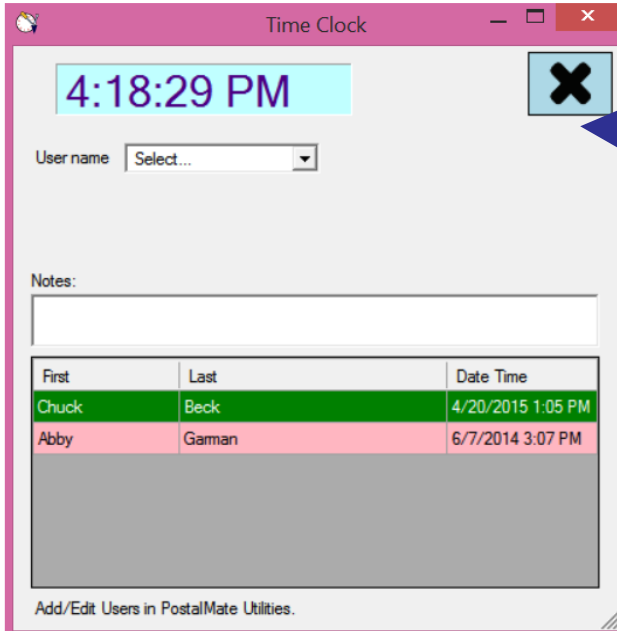


Over 90 assorted 4x6 labels

Customers love Fragile labels



Get more info at [VSoftwareTools.com](http://VSoftwareTools.com) > User Guides



Simple for staff and managers

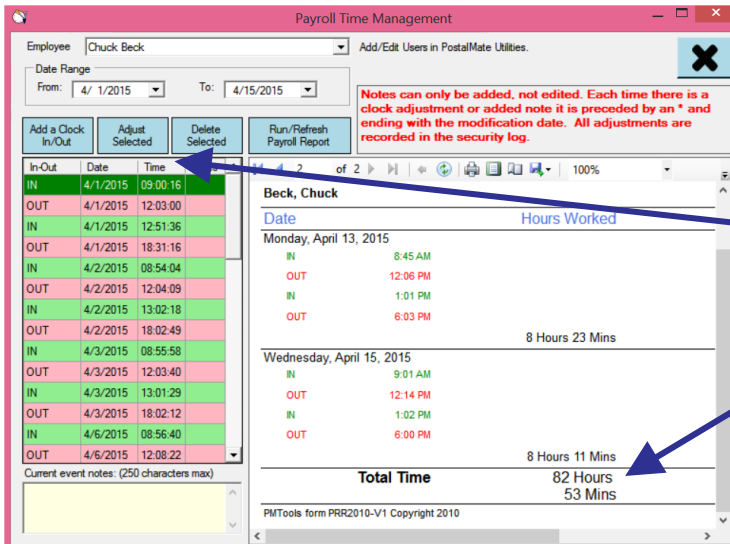
Staff notes for payroll report

Check in from any workstation



On Misc Tab

Get more info at [VSoftwareTools.com](http://VSoftwareTools.com) > User Guides



Simple for managers

Secure notes on payroll reports

Edits / adjusts are logged

Total Time easy to read

Add/Edit users in PM Utilities



Create SCAN from any station

Keep track of Postage Resets  
DAZzle is required for access!



Change Postal Date from any station



Quickly Check USPS Commits



Carrier Bill Reconcile

Invoice to Reconcile  
 Invoice Number: 5034-38487  
 Total: 119.61  
 Carrier: FedEx Express  
 Invoice Date: 5/18/2015  
 Due Date: 5/18/2015

Payment Information  
 Check Number: [ ] Amount: 0  
 Invoice Date: 5/18/2015

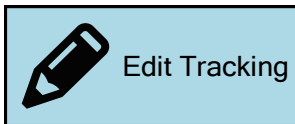
Filters  
 From: 4/27/2015 To: 5/18/2015  
 Search by Tracking Number

Tracking	Trk	Pkg ID	Ship ID	Ship	Whs	Ret	Ship To
780572732770	3:05 PM	120053	100539	Ship	21.60	45.06	1235 CORTEZ DR APT 1 SUNNYVALE, CA 94086 6506695193
780577389140	4/29/2015 11:37 AM	120078	100564	Pack	0.00	0.00	
780577730172	4/29/2015 12:05 PM	120082	100568	Disc	0.00	0.00	
				At In	0.00	0.00	
				Sur	25.60	50.06	

Service: FedEx Standard Overnight Envelope  
 Weight: 0.02 Exp Arrival: 4/30/2015 8:00:00 PM  
 Dim: 0 X 0 X 0 Contents: notarized document

Reconcile Information  
 Invoice: 5:027-00196 Inv Date: 5/9/2015 Amount: 25.60  
 Trk Total: 25.60 PM Retail: 50.06 Cost in PM: 25.60 Billed Now: 0.00  
 Trk vs. Inv: 0.00 PM vs. Inv: 0.00 Invoice Tally: 0.00

- Enter Invoice info
- Set Date Range
- Double Click to Track for Lates
- Package data & Delivery Commits
- Commercial Residential Toggle
- Enter \$ Billed now



Edit Tracking

Filters  
 From: Wednesday, May 20, 2015 To: Thursday, May 21, 2015

Ship From List

Company	First Name	Last Name	Address 1	Address 2	City	St	Zip
Kisti	Totten		3324 JACKSON ...		CHEHALIS		
Robert	Strumbaugh		103 Pier Rd		CHEHALIS		
Travers Electric			122 STURDEVA		CHEHALIS		
Ted	Stegeman		1731 SW KELLY...		CHEHALIS		
Lynette	Ahutick		1673 S MARKET...		CHEHALIS		

Ship To List

PkgID	Date	First Name	Last Name	Address 1	Address 2
120992	5/21/2015 3:27 PM			PO BOX 1001	
120993	5/21/2015 3:28 PM			8644 PACIFIC AVE	
120994	5/21/2015 3:29 PM			475 NW CHEHA...	
120995	5/21/2015 3:30 PM			10817 26TH AV...	
120996	5/21/2015 3:31 PM			PO BOX 1347	
120997	5/21/2015 3:33 PM			11095 SW INDU...	

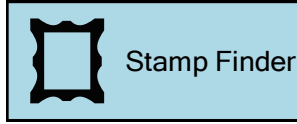
Package Information  
 Package ID: 120992  
 Carrier: United States Postal Service  
 Service: Priority Mail  
 Date: 5/21/2015 3:27 PM

Old Tracking: 9405510200881619017605  
 Change to: [ ]  
 Change Tracking

- Select shipment
- Type/scan new tracking



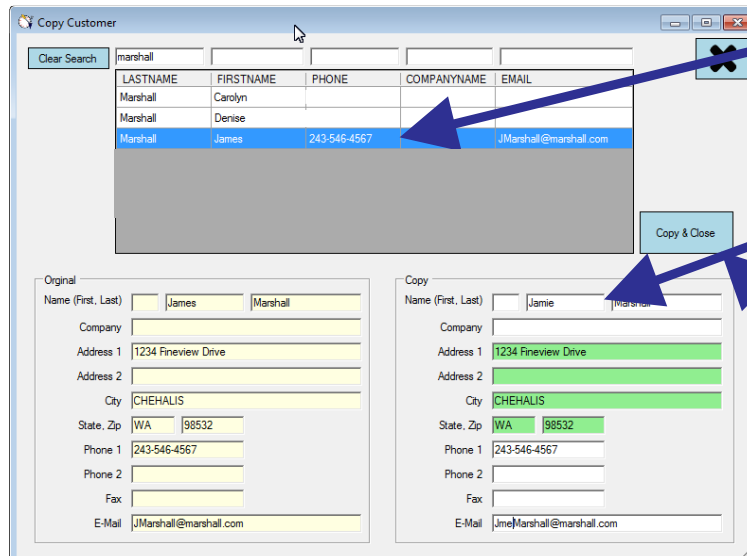
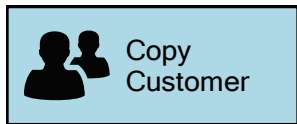
Fast access to International commodity restrictions by country.



Expertly find values for non-denominated USPS stamps



Quickly check the time around the world



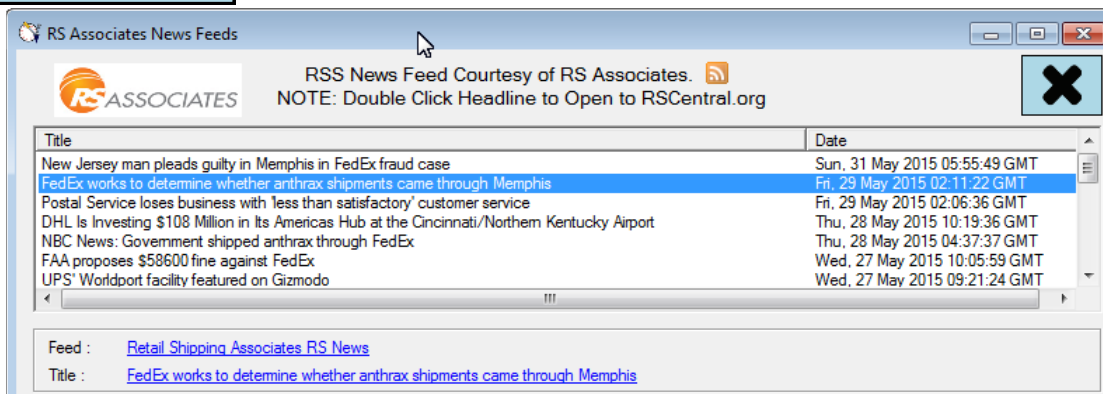
Locate existing customer

Update info for new customer

Copy and close



RS News Feed at your fingertips





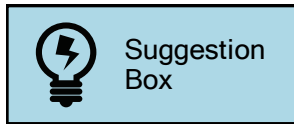
On Misc Tab

Email Setup is optional. It does not affect messages from PIMMS Package Management.

Enter your email & server info

Contact your local computer person for assistance

Test and Save Changes



On Misc Tab

We LOVE Tool Ideas!

