Pitney Bowes

Business Manager

User Guide
Canada English Version

Alerting Messages

Various messages are used throughout this guide to alert you to potentially hazardous or error causing conditions. These messages are as follows:

WARNING! Alerts you to conditions or practices that could cause serious injury.

CAUTION: Alerts you to conditions or practices that could cause damage to the equipment or to the material being run.

NOTE: Provides a comment or explanation of the associated topic.

IMPORTANT: Alerts you to conditions or practices that could adversely affect equipment operation if instructions are not followed exactly.

FCC Compliance

This equipment has been tested and found to comply with the limits for a Class A digital device, pursuant to part 15 of the FCC rules. These limits are designed to provide reasonable protection against interference when the equipment is operated in a commercial environment. This equipment generates, uses, and can radiate radio frequency energy and, if not installed and used in accordance with the instruction manual, may cause interference to radio communications. Operation of this equipment in a residential area is likely to cause interference, in which case the user will be required to correct the interference at his own expense.

Use only a shielded interface cable to operate this equipment with a scale or other peripheral device.

CAUTION: Changes or modifications to this equipment not expressly approved by the party responsible for compliance (Pitney Bowes®) could void the user's authority to operate the equipment

FCC Compliance of Modem

This equipment complies with Part 68 of the FCC rules and the requirements adopted by ACTA. On the UIC (control centre) backcover of this equipment is a label that contains, among other information, a product identifier in the format US: AAAEQ##TXXXX. If requested, this number must be provided to the telephone company. The equipment is designed to connect to a two-wire, local switch, access loop start (Facility Interface Code 02LS2) with a standard RJ-45 interface.

The REN is used to determine the quantity of devices that may be connected to the telephone line. Excessive RENs on the telephone line may result in the devices not ringing in response to an incoming call. In most, but not all areas, the sum of the RENs should not exceed five. To be certain of the number of devices that may be connected to the line, contact the telephone company to determine the maximum REN for your calling area.

If this modem causes harm to the telephone network, the telephone company may discontinue your service temporarily. You will be notified in advance or as soon as possible. You will be advised of your right to register a complaint with the FCC. If the user experiences trouble using this equipment, the user shall disconnect the equipment from the telephone line to determine if the equipment is malfunctioning. If the equipment is malfunctioning, the use of the equipment shall be discontinued until the problem is corrected.

The telephone company may make changes to its facilities, equipment operations, or procedures that could affect the operation of this equipment. In this event, the telephone company will provide advance notice for you to make necessary modifications to maintain uninterrupted service.

If you experience trouble with this modem, please refer to the warranty information provided with this equipment. If the trouble is causing harm to the network, the telephone company may request that you remove the equipment from the network until the problem is resolved.

This equipment may not be used with party lines or coin lines.

This equipment is not intended to be serviceable. Please refer to the warranty information if problems occur. Failed units will be withdrawn by approved Pitney Bowes® service engineers and returned to the U.S. Service Center. For reference purposes, the U.S. Service Center contact address is: Pitney Bowes® Inc., Walter Wheeler Drive, Stamford, CT 06926-0700.

A plug and jack used to connect this equipment to the premises wiring and telephone network must comply with the applicable FCC Part 68 rules and requirements adopted by ACTA. A compliant telephone cord and modular plug is provided with this product. It is designed to be connected to a compatible modular jack that is also compliant. See installation instructions for details.

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Chapter 1 - Read This First

Using this Help Guide

There are several built-in features you can use to navigate through the Help guide:

- Topics highlighted by a blue rectangle are hyperlinks.

  Using the Hand tool ( ), you can click anywhere within a hyperlink to jump to the topic's location in the Help guide.

  > - If you have not yet defined the accounting period on your system you will see the following icon in the Main screen at the Business Manager Host PC. You must set an accounting period before running mail. Refer to *Appendix A* in this guide.

  Example 1: Use the Hand tool to click on highlighted hyperlinks.

- Entries in the main *Table of Contents* and the table of contents at the beginning of every chapter are hyperlinks, although they are not highlighted.

  Simply move the Hand tool over a table of contents entry until it points, then click to jump to the location of the entry in the Help guide.

  Example 2: Use the Hand tool to click on table of contents hyperlinks.

- Page numbers in the *Index* are hyperlinks, although they are not highlighted.

  Simply move the Hand tool over the page number until it points, then click on the page number to jump to that page of the Help guide.

  Example 3: Use the Hand tool to click on page number hyperlinks in the Index.

What is Business Manager

Overview

Business Manager is an accounting system that allows you to capture postal transactions from the following Pitney Bowes® meters and mailing systems:

- Paragon® Meter
- B900 (with and without an Integra™ scale)
- 6500 (with and without an Integra™ scale)
- A900 (with and without an Integra™ scale)
- DM Series™ Digital Mailing Systems (DM400™, DM500™, DM550™, DM800i™, DM800™, DM900™ and DM1000™)

The Paragon®, B900, 6500, and A900 meters are collectively referred to as mailing peripherals or processors in this guide. Each one of these connects to its own Data Collector PC which is a PC running the Data Collector Module of Business Manager.

Each Data Collector PC connects to a master Host PC either via a direct network connection or through a dialup connection. The Host PC contains the working database and runs the Administrative Module of Business Manager.

The DM Series™ Digital Mailing Systems connect directly to the Host PC through your local area network. They do not require a Data Collector PC.

Running Mail

When you run mail from a Paragon® or other mailing peripheral, you enter the account number and rate information at the Data Collector using the Data Collector PC module. You then run the mail through the mailing machine or meter as you normally would do.

If you are using a DM Series™ Digital Mailing System, you enter the account number and rate information at the DM Series™ Digital Mailing System IntelliLink® Control Center.

All mailing peripheral data collectors and DM Series™ Digital

Mailing Systems automatically send the postal transactions to the master Host PC where they are stored in the working database.

Reporting and Analyzing Your Data

You can analyze and create reports on all of the postal transactions collected from the PC Data Collectors and the DM Series™ Digital Mailing Systems and stored in the working, archived or consolidated database on the Business Manager Host PC.

You manage all of your accounts, operators, and transaction data using the Administration Module of Business Manager at the Host PC. You can perform analyses and generate reports based on a wide range of criteria, including operator name, account name, the meter or mailing system used, the transaction date, number and/or weight of the pieces of mail, postage category and so on. You can use standard pre-formatted reports that come with Business Manager. The statistics module that is part of Business Manager extends the reporting facilities to include graphical representations of the data in the form of 2-D or 3-D charts. You can also export results of your statistical analyses for viewing in other external applications like Crystal Reports®.

Enterprise Organizations - Multiple Host PCs

If your organization has multiple sites that function independently, you can have several Business Manager host systems and designate one of those systems as the master Host PC. The hosts at the other sites, referred to as client or local hosts, connect to the master host via direct network connection, or through a dialup connection. The client hosts upload all of their transactions to the master Host PC where it is stored in a single consolidated database.

You can then analyze and create reports on all of the postal transactions stored in the consolidated database.

Navigating Through Business Manager

You can access all operations either from the Main menu, shortcuts on the Main menu, or from submenus from the top menu bar in any of the Business Manager screens.

From the Main menu:

1. From the Main menu, simply click on the appropriate selection. Links to other submenus are indicated by arrows next to the selection items:

2. Continue to click on the submenu selections until you get to the operation you want.

3. If there are system messages or tasks that require your attention, these appear in the Administration tasks to perform section at the top of the Main menu. To get more information on these, move the cursor over the icon in this section.
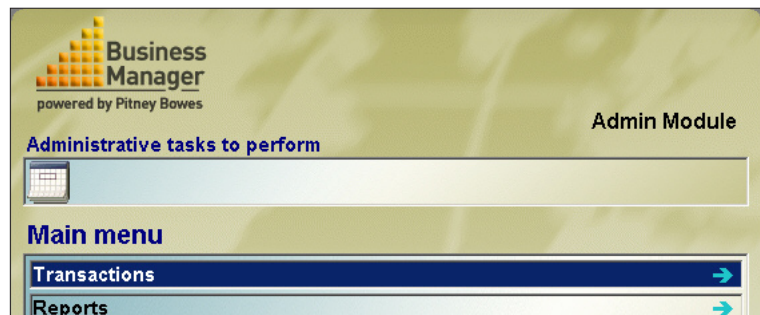
4. To go back from a submenu, click on the **Previous Menu** button.

From Main menu shortcuts:

1. To add a shortcut to the main menu:

    a. Click on the Main menu selections and submenus se-
        lections until you get to the operation you want.

    b. Right-click on the operation and select **Add to short-
        cuts**. The shortcut appears on the right side of the
        Main menu.

2. To go directly to an operation, click on the shortcut on the
    right side of the Main menu.

From submenus on the top Menu bar:

The top menu bar duplicates the Main menu options and pro-
vides an alternative method of navigating through the screens.
Click on a selection on the top menu bar and select the appro-
priate operation from the submenu or submenus:
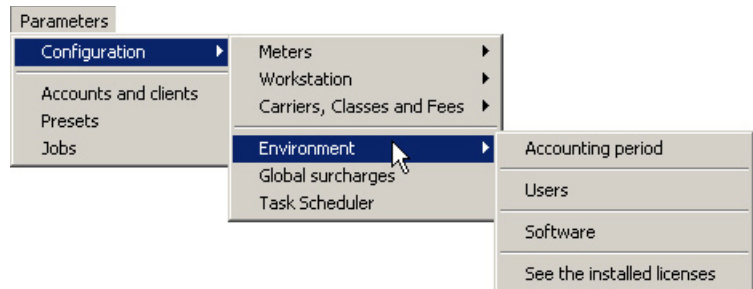
Before Using Business Manager

If your system is already set up and all of your accounts and operators are defined, you can begin processing mail at your meter or DM Series™ Digital Mailing System. For instructions on running mail, refer to *Chapter 2, Processing Mail Using Business Manager*.

If this is the first time you are using Business Manager, follow the steps listed here.

- Learn about the accounts and clients and how to view, edit, and create new clients and accounts. Refer to *Chapter 3, Understanding and Setting Up Accounts and Clients* in this guide.

- Learn about the types of operators and their rights and privileges. Refer to *Chapter 4, Understanding and Setting Up Operators* in this guide.

- If you have not yet defined the accounting period on your system you will see the following icon in the Main screen at the Business Manager Host PC. You must set an accounting period before running mail. Refer to *Appendix A* in this guide.
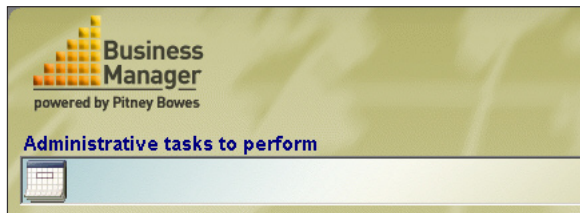
- Verify that all of your software licenses are enabled. This list of licenses shows the types of meters and mail processors you can run with Business Manager. It also lists any additional features that you may have purchased with you system. Refer to *Appendix B* in this guide.

- Check to see that all of the mail processors (meters, mailing machines, scales, barcode readers etc.) are defined and their connections verified at each Data Collector PC. In addition, you need to verify that each mail processor is registered at the Host PC. Refer to *Chapter 5, Working with Meters and Mail Processors* in this guide.

- Create a virtual meter to add manual transactions for those meters that are not connected to data collectors but for which you want to add postage information to the Business Manager database, or to simply create manual transactions independent of a meter. Refer to the section, *Creating a Virtual Meter for Manual Transactions* in *Chapter 5* in this guide.

- Import standard carriers, classes and fees, if necessary or add your own customized classes and fees. Refer to *Chapter 6, Working with Carriers, Classes and Fees* in this guide.

What's next?

After you start collecting all of your mail transaction data from mail processors and DM Series™ Digital Mailing Systems, you can edit, analyze and report on the data.

For viewing and editing transactions, refer to *Chapter 7.*

To analyze transaction data, refer to *Chapter 8*.

To run reports, refer to *Chapter 10* and *Chapter 11*.

Where You Perform Business Manager Operations

In general, you run mail from the Data Collector PC in combination with the mailing peripheral (for example, a Paragon® or 6500 Meter with or without an Integra™ scale) that is connected to the Data Collector PC. You can also run mail from the IntelliLink® Control Center on a DM Series™ Digital Mailing System.

You run mail as an operator using the Data Collector module of Business Manager, or as an operator at a DM Series™ Digital Mailing System.

As a manager, you perform all administrator functions, like adding new mailing peripherals or processors, adding or modifying accounts and operators, generating reports and analyzing your data at the Business Manager Host PC. You perform these operations using the Administration module of Business Manager.

The table on the following page summarizes the major system operations, where they are performed, and who can perform them.

Operation:	Perform at:	Who can do this:
Run mail	Data Collector or mail processor connected to the Data Collector. If you have a DM Series™ Digital Mailing System, you run mail from the IntelliLink® Control Center.	All
Add or edit clients and accounts	Business Manager Host PC.	Manager
Add or edit operators	Business Manager Host PC.	Manager
Add new mail processors; release old ones	Data Collector to which the mail processor is connected.	Manager
Display, edit, analyze, transaction data	Business Manager Host PC.	Manager
View, print, and schedule reports	Business Manager Host PC.	All
Backup and restore account data	Business Manager Host PC.	Manager

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Chapter 2 - Processing Mail Using Business Manager

Running Mail

You run mail from the Data Collector PC in combination with the mailing peripheral (for example, a Paragon® or 6500 Meter with or without an Integra™ scale) that is connected to the Data Collector PC. If you have a DM Series™ Digital Mailing System, you run mail from the IntelliLink® Control Center on the DM Series™ Digital Mailing System.

You can run mail as a Manager or operator.

Refer to the sections listed here for instructions on running mail from the following mail processors.

- Using a B900, 6500 or A900 Meter
- Using a B900, 6500 or A900 Meters with an Integra™ Scale
- Using a Paragon® Meter
- Using a DM Series™ Digital Mailing System

NOTE 1: The screens and procedures for running mail on the B900, 6500 and A900 meters with or without an Integra™ scale are almost identical and are therefore combined in two common procedures.

NOTE 2: If when you are running mail at any of the above meters or mailing systems and you let the system remain idle for a certain period of time (length of time depends on how your system is configured), you will be prompted to re-enter your password before continuing.

Using a B900, 6500, or A900 Meter

1. Set the date at the B900, 6500, or A900 as you would normally.

2. At the Data Collector PC, select **Process Mail | B700/B900**, or **6500**, or **A900**.

3. The message "Initializing Meter" appears and then the *Process Mail screen*.

NOTE: If you get a register discrepancy message, refer to the *Correcting Register Discrepancy Errors* section in this chapter.
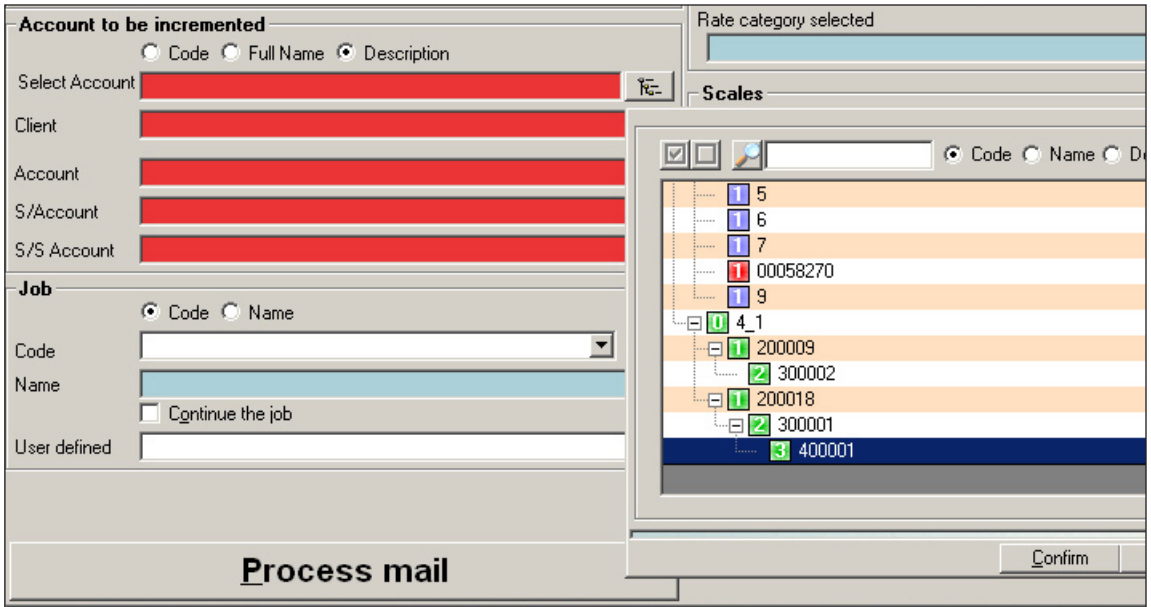
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4. If you have defined optional presets, you can click on the down arrow in the **Name** or **Code** field of the "Preset" section and choose the appropriate preset.

When you select a preset, all of the information fills in the "Account", "Job" and "Rates category" sections. You are then prompted to enter the postage value. Go to step 12. If you are not using presets, continue to the next step.

5. In the **"Account to be incremented"** section select an account by clicking on the account selection button [icon].

   A list of accounts appears as shown in the figure below.

6. Click on and select the account (only the lowest level account in a multilevel account).

7. Click **Confirm**.

8. To select a job, click on the down arrow in the **Code** or **Name** field of the "Job" section and choose from the list of pre-defined jobs.

9. Select the rate, class and any special fees in the "Rate category" section. If you have pre-defined rate categories, click on the down arrow in the **List of current categories** and choose the category.

    To define other rates, click on the **Other rate category** button. Refer to the *Selecting Rates for Processing Mail* section in this chapter for more information.

10. In the "Scales" section, click on the **Enter weight** button and enter in the weight using the mouse and the keypad that appears in the screen.

11. Press the **Confirm** button and the *Postal category valuation* screen appears with a place for you to enter the postage amount.

Please enter valuation for the selection postal category		
Carrier	Canada Post Priority Courier	
Class	Standard Letter	
Destination	Default Destination	0.000
Fees	Auto Oversize	0.000
	Registration	0.000
	Security	0.000
	COD	0.000

12. Enter the postage value for your category. For example, enter .50 for a standard domestic letter that is under 30 grams and click the **Done** button.

13. To add a surcharge to this batch of transactions, click on the **Surcharges** button and enter the surcharge information. For more information on surcharges, refer to *Chapter 9, Adding Surcharges* in this guide.

14. Click on the **Process mail** button. You are prompted to validate the postage amount again. Click **Done** to continue.

15. At the meter, press the **Print Only** or **Tape** button and feed each piece of mail. The message "Processing mail" appears on the Data Collector.

16. When you are finished, click on the **End transaction** button at the Data Collector PC.

17. Before the transactions are charged to the account, you may be prompted to view or charge the transactions to another account. If you want to make changes, refer to the *Reallocating Transactions* section in this chapter.

    To complete the transaction without making any changes, click on the **Update now** button.

Using a B900, 6500, or A900 Meter with an Integra™ Scale

This describes how to run mail at a B900, the 6500, or the A900 that has an Integra™ scale attached to it. You perform this at the Data Collector PC to which the postage meters are connected.

1. Set the date at the B900, 6500, or A900 as you would normally.

2. At the Data Collector PC, select
   Process Mail | B700/B900 with Integra™ scale or
   6500 with Integra™ scale, or **A900 with Integra™ scale**.

3. The message "Initializing Meter" appears and then the *Process mail* screen shown on the next page.

   NOTE 1: If you get a register discrepancy message, refer to the *Correcting Register Discrepancy Errors* section in this Chapter.

   NOTE 2: If you get a message stating that "The meter currently connected reports rates that are not declared yet in Business Manager, click **OK** and refer to the *Register New Meter Rates* section in this chapter.

4. Place the piece of mail on the Integra™ scale.

5. At the Integra™ scale, press the **Accounts** key and enter the account code of the account on Business Manager to which you want to charge the transactions.

   Press the **Enter** key on Integra™ scale and the account information appears in the *Process mail screen* on the Data Collector as shown in the screen on the next page.

6. If you want to assign the transactions to a job, do it in the "Job" section of the *Process mail* screen on the Data Collector. To select a job, click on the down arrow in the **Code** or **Name** field and choose from the list of pre-defined jobs.

7. To add a surcharge to the transaction, click on the **Surcharges** button at the bottom of the *Process mail* screen and enter the surcharge information. For more information on surcharges, refer to *Chapter 9, Adding Surcharges* in this guide.

8. At the Integra™ scale, select the rate, class and any special fees as you normally would do on the scale. Press the **Enter** key on Integra™ scale and the rate information and the weight of the piece of mail appears in the Rate and Integra™ weight sections of the *Process mail* screen.

9. At the Integra™ scale, press the **Meter Set** button. The "Processing mail" message appears in the *Process mail* screen.

10. At the meter, press the **Print Only** or **Tape** button and feed each piece of mail.

11. When you are done, press the **Meter Set** button on the Integra scale to end the mail run.

    The information for the mail run appears on the right side of the *Process mail* screen as shown here.

***Using a Paragon®
Meter***

To run mail from your Paragon®, you enter a valid account code at the Paragon® control panel. A valid account code is one that is in the Business Manager Host PC database.

You initiate the mail run at the Data Collector PC attached to the Paragon®; you perform all other operations for the mail run at the Paragon® control panel.

For detailed information on the Paragon®, refer to your *Paragon® Operating Guide.*

1. At the Data Collector, select **Process Mail**, then select **Paragon**. The message "Initializing the meter" appears.

2. At the Paragon® control panel, press the **Red** key, then the **Zero** key. You are prompted to enter an account number.

3. Enter a valid account number (one that is in the Business Manager Host PC database).

4. The first Paragon® *Process mail* screen appears. The Paragon® account code you selected on the Paragon® appears in the "Paragon External Account" field in the "Entered Codes" section.

5. The account code information also updates in the "Business Manager Account" section as shown in the screen on the next page.

6. At the Paragon® meter, select the class and any fees as you normally do when you run mail.

7. If you want to add surcharges to these transactions, click on the **Surcharges** button at the bottom of the *Process mail* screen at the Data Collector and enter the information. For more information on surcharges, refer to *Chapter 9, Adding Surcharges* in this guide.

8. At the Paragon®, load the mail and press the **Start** key. The message "Processing Mail" flashes on the Data Collector *Process mail* screen.

9. The number of mail pieces, postage and total weight appears in the "Registers" section of the Paragon® *Process mail* screen on the Data Collector.

10. To end the mail run and stop the processing at the Data Collector PC, press the **Stop** key on the Paragon® meter.

11. To start another run, go to the Paragon® control panel keyboard. You can use the same account code to run more mail by simply pressing the **Enter** key.

    a. To start a new batch using the same account, press the **Batch** key on the Paragon® control panel.

    b. To use a different account, press the **Red** key, then the **Zero** key. Enter the new account number when prompted and repeat the process.

Using a DM Series™ Digital Mailing System

Your DM Series™ Digital Mailing System is connected to your Business Manager Host PC though your local area network. It does not require a Data Collector PC.

You set up the accounts for your mailing system at the Business Manager Host PC in the same way you set up accounts for all other meters and mail processors. Refer to *Adding Accounts* in *Chapter 3* in this guide.
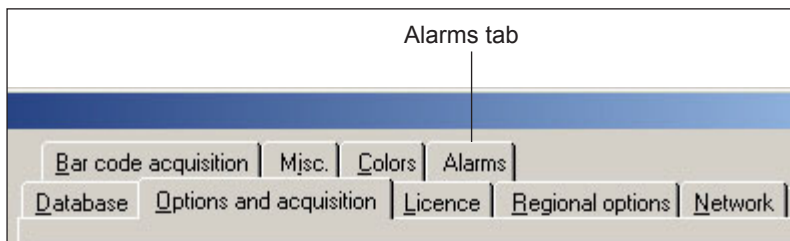
You set up all DM Series™ Digital Mailing System operators at the Business Manager Host PC in the same way you set up all other operators. Refer to *Adding or Editing Operators* in *Chapter 4* in this guide. These operators are automatically available at the DM Series™ Digital Mailing System when you run mail.

DM Series™ Digital Mailing System Alarming Options

You can set alarming options to notify you if your DM Series™ Digital Mailing System becomes disconnected from the Business Manager Host PC.

The alarming options are set at the Business Manager Host PC. You must have manager level access rights to set the alarm.

1. Select **Parameters | Configuration | Environment | Software**. A password prompt appears.

2. Type in your password and click **Confirm**. The *Software* screen opens.

3. Click the **Alarms** tab.
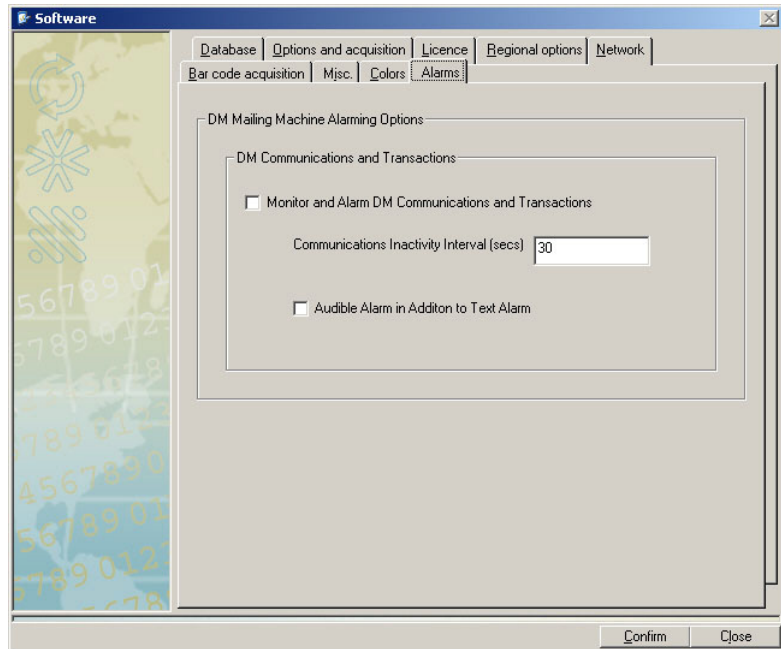
4. Click in the **Monitor and Alarm DM Communications and Transactions** check box (so that a check mark appears) to enable DM Series™ Digital Mailing System alarming.

5. Type the communication interval in the field provided.

   NOTE: "Communication interval" means the amount of time, in seconds, you want the system to wait in between checks for mailing system connectivity.

6. Click in the **Audible Alarm...** check box (so that a check mark appears) if you want to hear an audible "beep" when a DM Series™ Digital Mailing System is disconnected from the Business Manager Host PC.

7. Click **Confirm** when done.

DM Series™ Digital Mailing System Interface Service for Business Manager

Before you run mail from the DM Series™ Digital Mailing System:

1. At the Business Manager Host PC, locate the Meter Status icon in the system task bar located at the lower right corner of your screen:
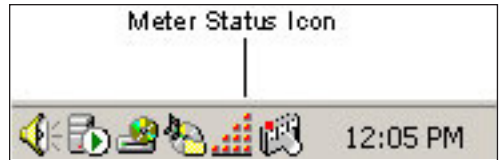
2. Double-click on the icon. A dialog box appears showing how many ports are open on your Business Manager Host PC for your DM Series™ Digital Mailing System and if the interface service is running.
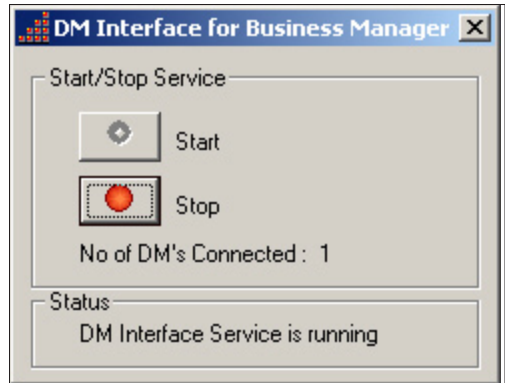
> **IMPORTANT:** If, for any reason, your DM Series™ Digital Mailing System becomes disconnected from the Business Manager Host PC, the interface service screen *may* show that the system is still connected. (This dialog monitors the availability of the port.) It may take several minutes after a DM Series™ Digital Mailing System is disconnected for the port to time out and this screen to update. Once the screen updates, a dialog box will appear indicating the type of error the system has encountered. Be sure to check all of your system connections, and verify the interface service is running.

3. To start or restart the interface service, click **Start**.

Running Mail on the DM Series™ Digital Mailing System

To run mail at the mailing system:

1. At the IntelliLink® Control Center select the account (that you set up on Business Manager) by pressing the **Accounts** key.

2. Use the down arrow on the control center to scroll down through the list of accounts.

3. If you do not see the account, type in the first few digits of the account name and press the **Enter** key. The DM Series™ Digital Mailing System searches for all of the accounts beginning with those digits and lists them in the display.

> **NOTE:** Your DM Series™ Digital Mailing System always checks the local accounts first for a perfect match for your entry. To force a search at the Business Manager Host PC, try entering a space after the first few characters.

4. Press the screen key corresponding to the account you want.

5. Refer to the operator guide supplied with your mailing system for detailed instructions on running mail.

Selecting Rates for Processing Mail

When you run mail or enter manual transactions, you select the rates in the "Rate Category" section of the *Process mail* or *Manual Input* screens.

1. Click on the **Other rates category** button in the *Process mail* screen or the [🖳] button on the *Manual Input* screen. The *Postal category selection* screen open. This screen lists the available carriers.
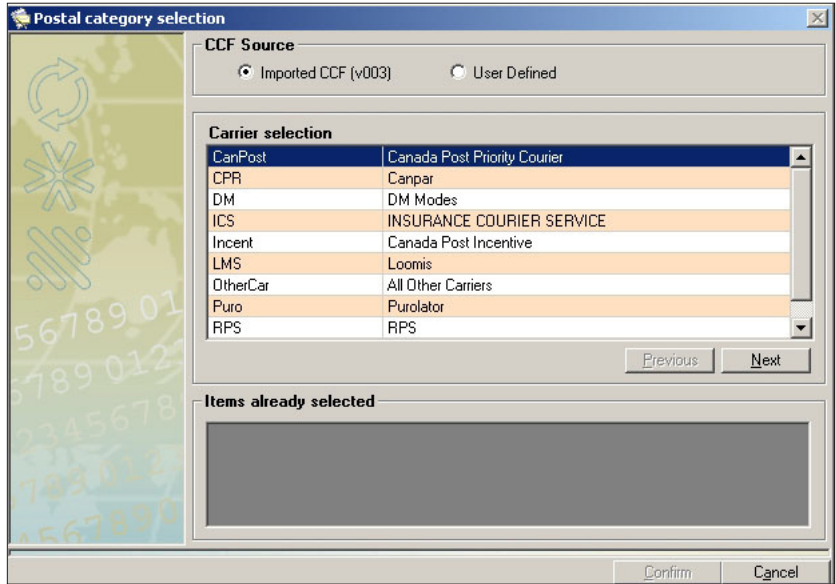
2. Click on the appropriate option button in the "CCF Source" section. Business Manager comes with the most commonly used carriers and their standard classes of service. To use these, click on the option for "Imported CCF."

3. Select and highlight the service you want, for example, Xpresspost. Click on **Next**.

4. The *Postage category selection* screen appears.
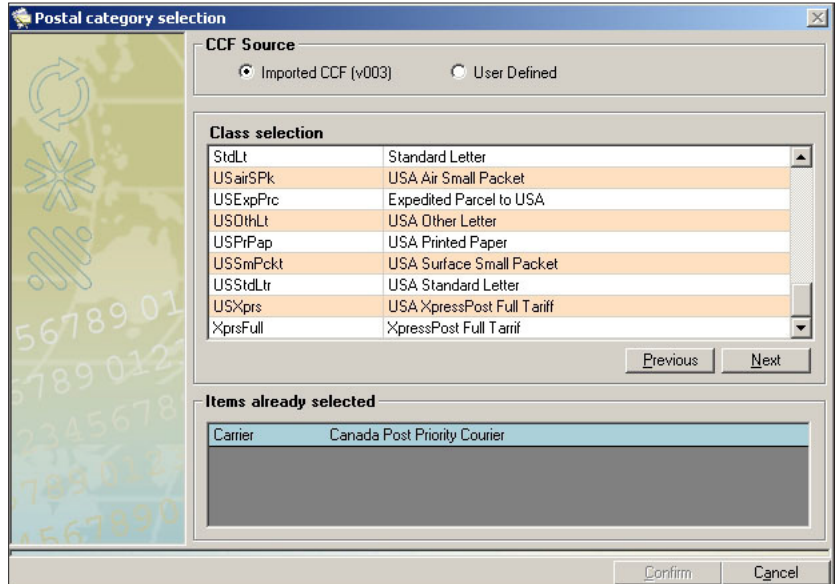
5.   Select and highlight the appropriate class.

6.   Click on the **Next** button and a list of available services appears. If you are done, click **Confirm**.

   a.   If you want to select a service, click on the service and then click **Next**.

   b.   You can continue to add services by clicking selecting the service and clicking on the **Next** button. As you add services, they are displayed in the "Items already selected" box.

7.   When you are done, click the **Confirm** button. At this point, you are prompted to save this rate information (carrier, class, and services).

8.   To save this information so in the future you can select it as a predefined category, click on the option button for "Save this category among the predefinitions" and type a name for the category.

**Correcting
Register
Discrepancy Errors**

1. If for any reason your meter register and the Data Collector register do not match (for example, the meter was disconnected from the Data Collector and the collector never received the transactions) Business Manager shows you the discrepancy and prompts you to correct it.

2. Click **OK** to the prompt and the register discrepancy correction screen appears.


3. This screen allows you to charge the transactions on your meter to an account on Business Manager.

    NOTE: To break up into multiple transactions, use the **Detail entry** tab.

4. Fill in the account, rate category, and job information for these transactions and then click on the **Add** button.

5   The system notifies you that the correction for the meter discrepancy is done. Click **OK**.

6. Click the **Confirm** button to finish adding the transactions to the database. The *Process Mail* screen reappears.

Reallocating Transactions

When you run mail from a meter or mailing machine that is connected to a Data Collector PC, you may be prompted to reallocate or reassign the transactions before charging them to an account. The following screen appears:
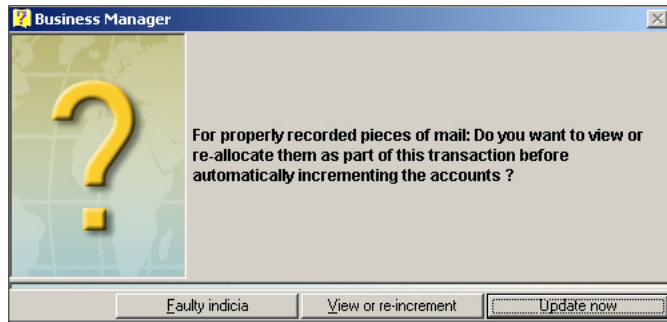
Select the appropriate option and follow the prompts. The options are described in this section.

Update now

To bypass reallocating your transactions, click on the **Update now** button.

Faulty Indicia

1. Click on this button if the meter stamp did not print correctly on a piece of mail. A screen appears that allows you to subtract the number of improperly printed meter stamps (indicia).

2. Select **Faulty refundable** or **Faulty nonrefundable** from the drop-down menu.
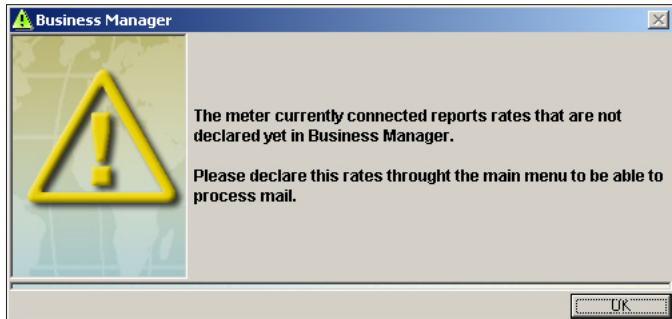
View or re-increment

Click on the **View or re-increment** button if you want to charge the transactions to another account or job.

Registering New Meter Rates

1. When you process mail at a Data Collector connected to a B900, 6500, or A900 with an Integra™ scale, you may get the following message:

2. Click **OK** and the Process mail screen closes.

3. Start the Administrative module on the Business Manager Host PC to which this Data Collector is attached.

4. Log on as a Manager and select **Parameters | Configuration | Carriers, Classes and Fees | Register new Meter rates**. The *Associate Postal Rates* screen opens.

5. Click on **Confirm** at the bottom of the screen.

6. You can now process mail at the Data Collector.

Chapter 3 - Understanding and Setting Up Clients and Accounts

Understanding Accounts

Account Structure

The structure of Business Manager accounting is based on four levels:

- Client
- Account
- Sub Account
- Sub-Sub Account

Your accounting structure can vary depending on your requirements.

You can structure your accounts in single or multiple levels. For example, you can divide a top level department (account) into two additional sub sections. An example of a multiple level account is shown here:

Client	Cost Center A
Account	Engineering Department
Sub Account	Software Development
Sub-Sub Account	Software Testing

IMPORTANT: You can have all single top level accounts or you can mix both single and multi-level accounts but the lowest level account is where charges to the account are incurred.

What is a Client   Clients provide you with a means of organizing your top level accounts according to cost center, location, customer, or whatever business entity is appropriate for your site.

Account Attributes   When you create accounts, you assign the following attributes to each top level account, sub account, and sub-sub account:

Account Code - This is a unique code that Business Manager assigns to identify the account, sub account, or sub-sub account. You can change the number assigned by Business Manager but this code must be unique for every account level for single host sites, and for global accounts (see *Global and Local Accounts* below) within enterprise organizations that have multiple hosts. It is strongly recommended that you use the account code automatically assigned by Business Manager.

This code allows you to find a particular account, sub account or sub-sub account anywhere in your organization.

Account Name - This can be any name you assign to an account, sub account or sub-sub account. This must be unique for the fully qualified name (for example, Engineering-Software-Testing) for all levels in single host sites and for global accounts (see *Global and Local Accounts* below) in enterprise organizations.

Description - You can enter a description for each account, sub account or sub-sub account. This description does not have to be unique.

Global and Local Accounts   When you create accounts in a multiple host enterprise organization, you can designate them as global or local.

Local Accounts - If you define an account as local, you can only charge transactions to that account at the host where you created it. The transactions for local accounts are sent to the master Host PC where they are stored in the consolidated enterprise database where you can view them and run reports on them.

Global Accounts - If you are part of a multi-host enterprise system, you may use global accounts that are shared by all hosts in the enterprise.

If you define an account as global, it is stored on the master host database, even if you create it at a local (client) host. You can charge transactions to any global account from any local host in your enterprise organization.

System Accounts

Business Manager automatically assigns transactions to pre-defined system accounts whenever one of the following conditions occurs:

- You edit or void a transaction (see *Editing or Voiding Transactions, Chapter 7* in this guide).

  NOTE: Any voided or modified transactions are assigned to the system account named: 00007

- You get unverified transactions (see *Correcting Unverified Transactions, Chapter 7* in this guide).
- If the meter stamp (indicia) doesn't print correctly and you need to reallocate the charges for that transaction (see *Reallocating Transactions, Chapter 2* in this guide).

To view the system accounts, refer to the *System Account Reports*, *Chapter 10* in this guide.

Adding Clients

You add or edit clients at the Business Manager master or local Host PC using the Administration module. You must be a manager to perform this operation.

1. To add a new client or edit an existing one, select **Parameters | Accounts and clients**. The *Clients and Accounts* screen opens.
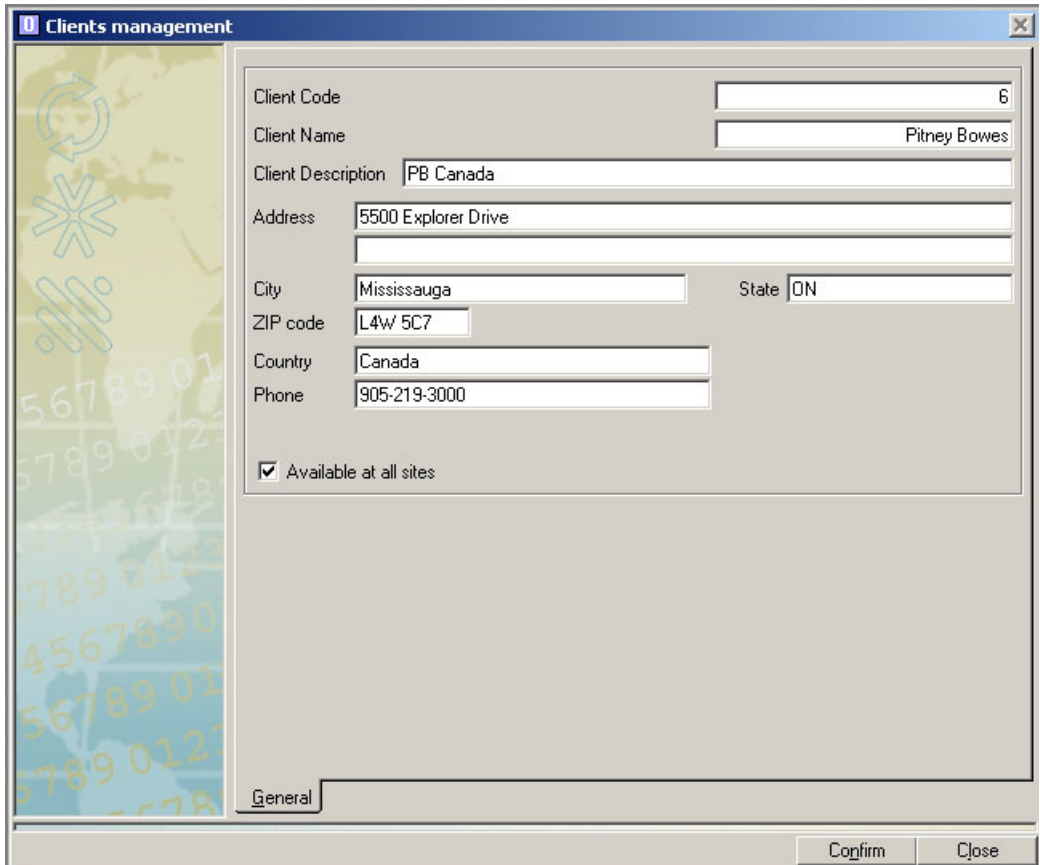

NOTE: The screen shown here is for a multi-host enterprise system. If you have a single host system, the **Disconnect from the Master host** and **Synchronize** buttons do not appear.

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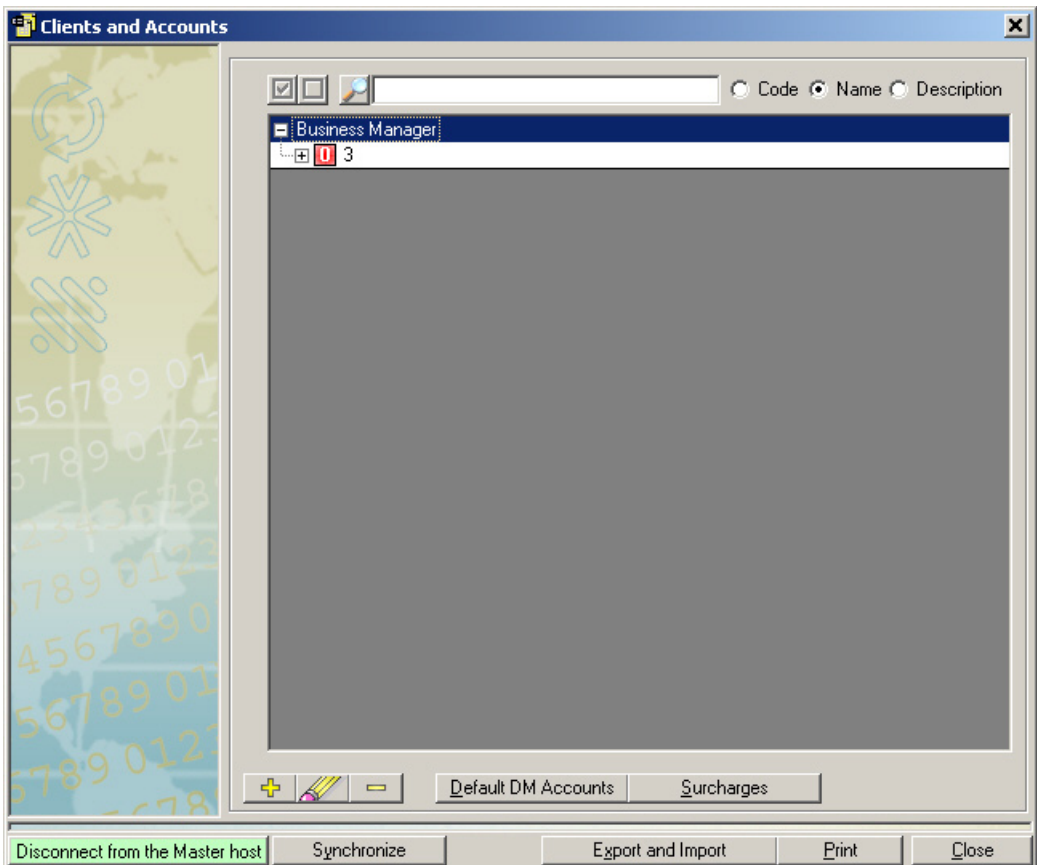
2. Click on and highlight **Business Manager** in the *Clients & Accounts* screen.

---

3. Click the [+] button and the *Clients management* screen appears.

The system automatically assigns a numeric value to the **Client Code**. Use the default value in this field. Enter the information in all of the other fields in the screen.

4. All of the mailing peripherals (Paragon®, B900, 6500) you have registered at this Host PC can charge transactions to the accounts associated with this new client.

   a. If you have an enterprise organization and you want to make this Client and its accounts available to all of the local hosts in your enterprise, click on the check box in

front of "Available at all sites".

> **NOTE:** If you select to make this client available to all local hosts, make sure you have clicked on the **Connect to Master Host** button on the *Clients and Accounts* screen.

    b. If you want to select certain accounts for a DM Series™ Digital Mailing System, refer to *Adding DM Series™ Digital Mailing System Accounts* in this chapter.

5. When finished, click on the **Confirm** button. The new client appears in the *Clients and Accounts* screen. If this is an enterprise operation and you designated this client as global, a green colored icon [U] appears in front of the Client name to indicate that it is a global client.

If you add a local client, it appears as a red colored icon [U] .
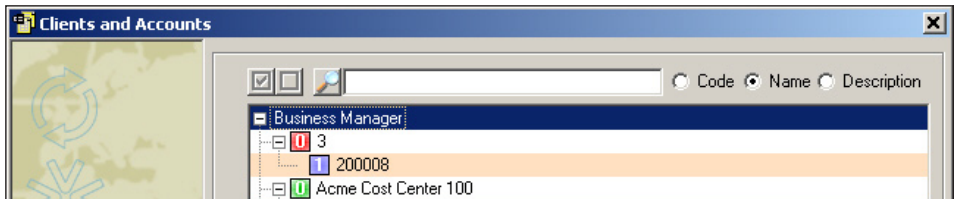
6. If you want to update this host with any changes made to other hosts in an enterprise multi-host site, click on the **Synchronize** button at the bottom of the screen.

Adding and Editing Accounts

You view, add, or edit accounts at the Business Manager master or local Host PC using the Administration Module. You must be a manager to perform this operation.

If this is the first time you are using Business Manager, you need to add the name of the client to which you will be adding the accounts. To add a new client or edit an existing one, refer to *Adding Clients* in this chapter.

If you are adding accounts for a DM Series™ Digital Mailing System, create the accounts as described here and then refer to *Adding DM Series™ Digital Mailing System Accounts* in this chapter.

Adding Accounts

1. To view, add or edit accounts, select **Parameters | Accounts and clients**. The *Clients and Accounts* screen opens.
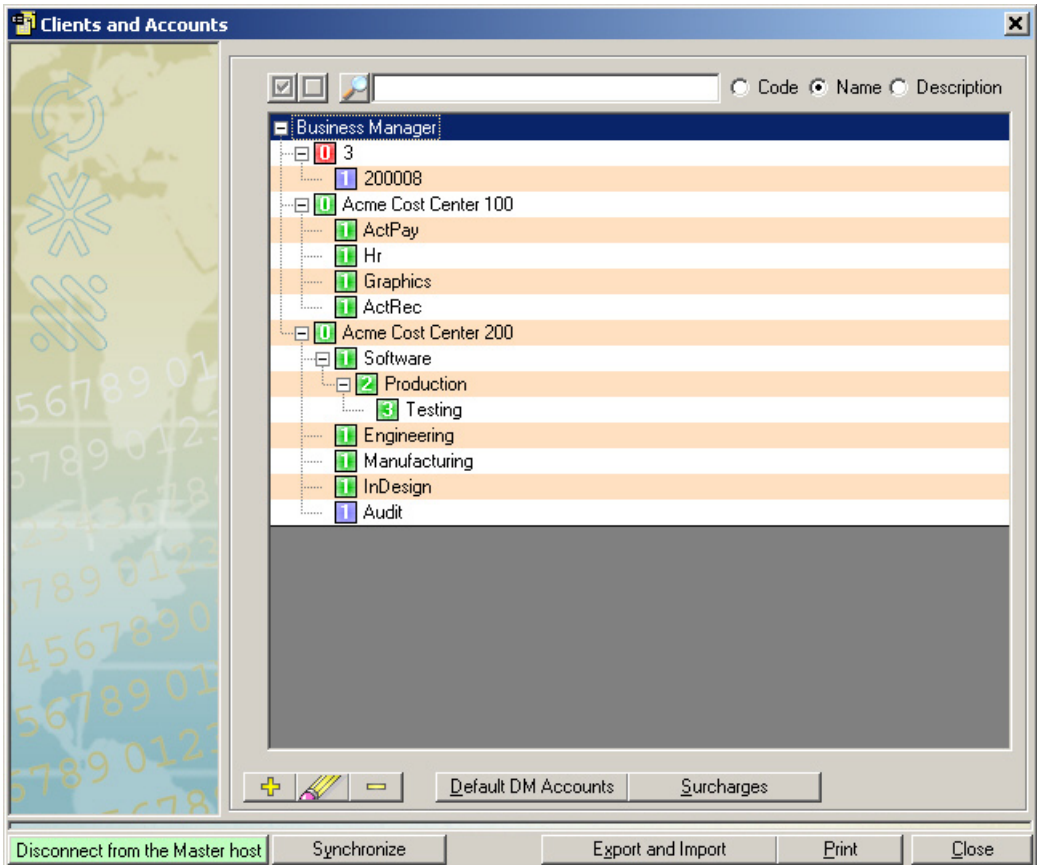
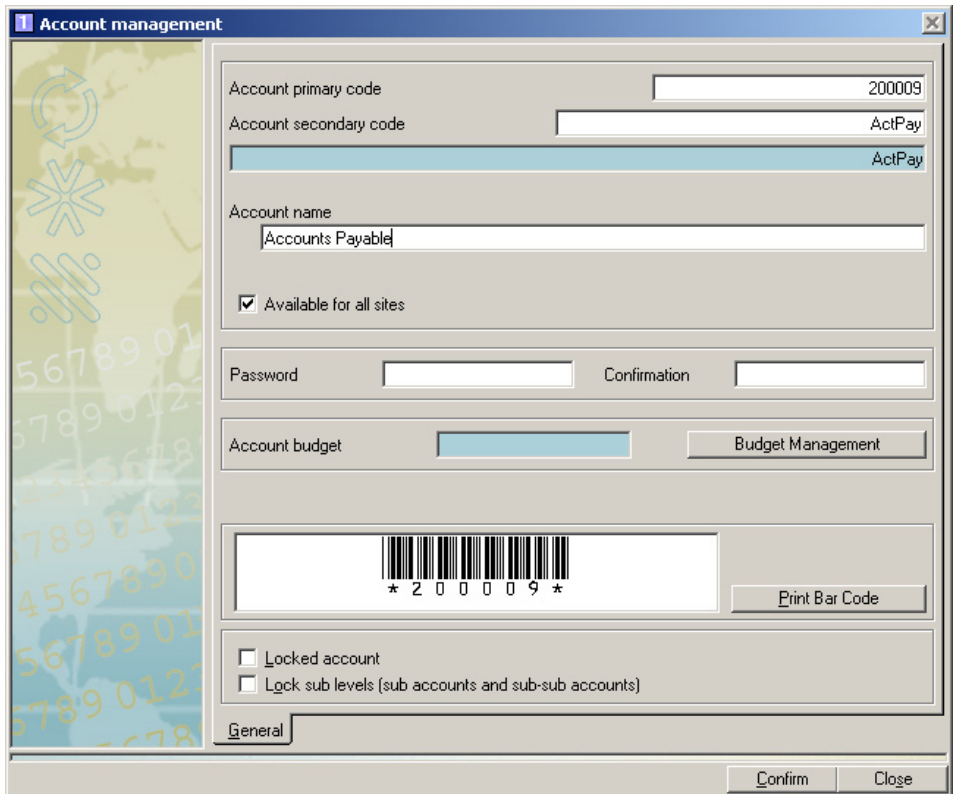2. This screen lists all of the current accounts, sub accounts and sub-sub accounts for each client. This screen shows the accounts listed by Name.

   a. A blue [1] icon appears in front of local accounts.

   b. A green [0] icon appears in front of global accounts.

3. To list the accounts by **Code** or **Description**, click on the corresponding option button at the top of the *Clients and Accounts* screen.

4. To add a new top level account, click on the Client and then the [+] button.

    b. To add a new sub account, click on the top level account and then the [+] button.

    c. To add a new sub-sub account click on the sub account and then the [+] button.

    d. The *Account management* screen opens. All of the screens have similar fields. The screen shown here is for adding a top level account.

5. Fill in the fields in the account management screen. Refer to *Filling in the Account Management Screen Fields* section in this chapter for more information.

NOTE 1: If you create a global account by clicking and putting a check mark in front of "Available at all sites", you cannot change this to a local account once you click on the Confirm button and save the account. The same is true if you create a local account - you cannot change it later to a global account.

NOTE 2: If you need to add a budget to an account, refer to *Assigning Budgets to Accounts* in this chapter.

---

6. If this is the first time you are adding DM Series™ Digital Mailing System accounts, refer to *Adding DM Series™ Digital Mailing System Accounts* in this chapter.

7. When finished, click **Confirm**.

NOTE : You must exit the *Account Management Screen* in order for you changes to take effect.

Editing or Deleting an Account

If you have already charged transactions to an existing account:

- You cannot delete the account. If you want to prevent operators from charging transactions to this account, click on the check box in front of **Locked account** in the account management screen.

- If you add a sub account to an account, the system will notify you that it will move the transactions from the parent account to the sub account. You will be asked to confirm this operation.

1. To edit an account, select the client or sub account and click on the ![edit button] button. One of the account management screens opens.

   NOTE: If you need to add a budget to an account, refer to *Assigning Budgets to Accounts* in this chapter.

2. Fill in the fields in the account management screen. Refer to *Filling in the Account Management Screen Fields* section in this chapter for more information.

3. To delete an existing account, click on and select the account, then click on the ![delete button] button.

4. When you are done, click on the **Close** button.

Filling in the Account Management Fields

- When adding or editing accounts, you need to fill in the fields in the *Account*, *Sub Account*, or *Sub-sub Account Management* screens. The fields are described in the table in this section.

- Most of the fields are the same for all account management screens for both global and local accounts but when there are differences they are noted here.

- When you have finished entering the information in the fields, click on the **Confirm** button at the bottom of the management screen.

Field	Description
Account Code	The system provides a unique numeric code by default. You can change this but the code must be unique for every account on the master host and for every account on each local host.
	You can enter any combination of numbers and letters for this code. If you are adding a sub account or sub-sub account to this account, the total number of character for all account levels cannot exceed 60 characters.
	This code allows you to find this account anywhere in your local or enterprise network of mailing systems and machines.
Account Name	This is another name or code that you can assign to your account. Like the account code, this must also be unique for every account on the master host and for every account on each local host.
	If you do not enter anything in this field, the system uses the account code by default.
Account Description	You can assign a description to any of your accounts to help locate or identify groups of accounts. This does not have to be unique.

Field	Description
Locked Account	If you place a check mark in this box, you lock the account. You will not be able to charge any transactions to this account once it is locked. For global accounts, you can lock this account on the master host, or on the local host where it was created. You cannot lock it from a different local host however.
Lock Sub Levels	If you lock the account, you automatically lock the sub accounts.
PARAGON® account	This applies only if you are using accounts from a Paragon® meter. You can enter the Paragon® account number in this field as a means of cross-referencing your accounts.
Password	You can protect your account by assigning it a password. If you enter a password, you must re-enter it in the Re-type password field. For global accounts, you can assign a password at the master host or on the local host where it was created. You can assign a different password to this account on a different local host, but the password for the account will remain the same as originally assigned on the master host (and on the local host where it was created).
Account Budget	This field displays the amount you have assigned to this account. To change or modify this, click on the **Budget Management** button. If you have multi-level accounts, this button only appears in the lowest account level. All budgets are considered to be local regardless or whether the account is global or local. The budget you set will only apply to the transactions collected at this master or local host. Refer to *Assigning Budgets to Accounts* in this chapter.

Adding DM Series™ Digital Mailing System Accounts

If you have a DM Series™ Digital Mailing System connected to your Business Manager Master or Local Host PC, you create your DM Series™ Digital Mailing System accounts at the Business Manager Host PC in the same way that you create accounts for all other meters and mailing machines.

If this is the first time you are adding DM Series™ Digital Mailing System accounts you can create a default list of accounts that is downloaded and stored directly on the IntelliLink® Control Center of your DM Series™ Digital Mailing System.

NOTE: This download operation is only done one time.

Since these accounts are stored directly on the control center, you can access these accounts more rapidly than if you have the control center search through all of the accounts stored in the Business Manager database.

To set up the default DM Series™ Digital Mailing System accounts

1. Select **Parameters | Accounts and clients**. Create the accounts as described in the *Adding Accounts* section in this chapter.

2. When you are finished creating the accounts, click on the **Default DM Accounts** button at the bottom of the *Clients and Accounts* screen. The following screen opens.
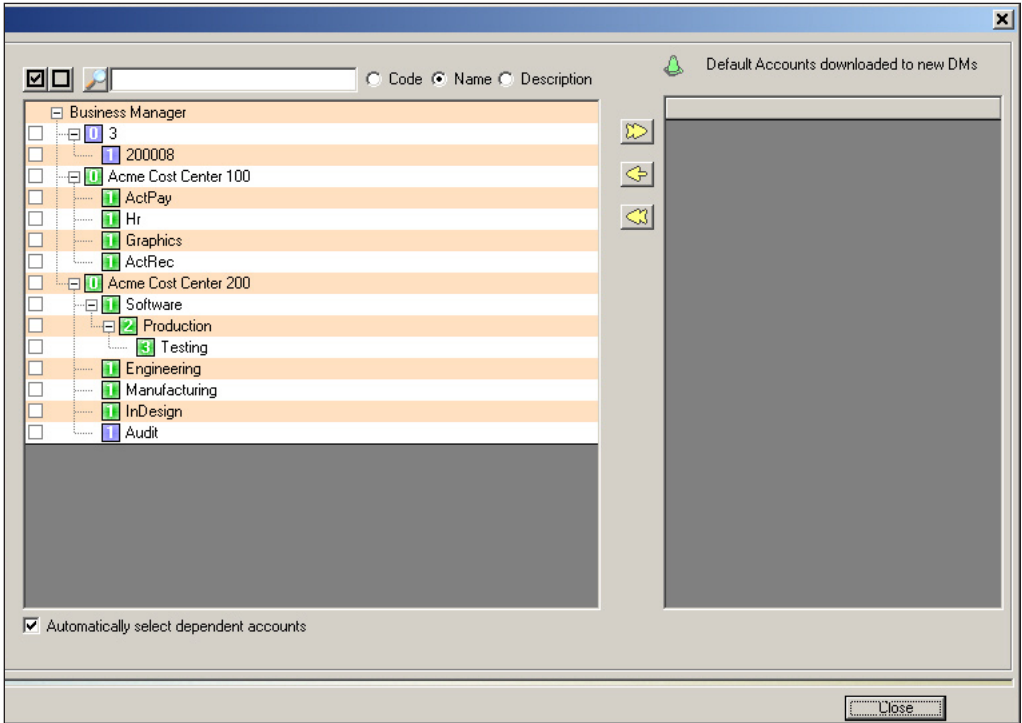

3. The accounts you created appear on the left side of the screen.

4. To select all of the accounts, click on the ☑ icon at the top of the screen.

5. To select individual accounts, click in the box in front of each account.

   To select all of the accounts and sub accounts for a client, make sure there is a check mark in the box in front of "Automatically select dependent accounts" at the bottom of the screen.

When you click on the box in front of the client, all of the accounts and sub accounts will be selected.

6. To deselect all accounts, click on the ☐ at the top of the screen.

7. When you are done selecting the accounts, click on the ⏩ button.

8. The selected accounts now appear in the "Default Accounts downloaded to new DMs" portion of the screen.
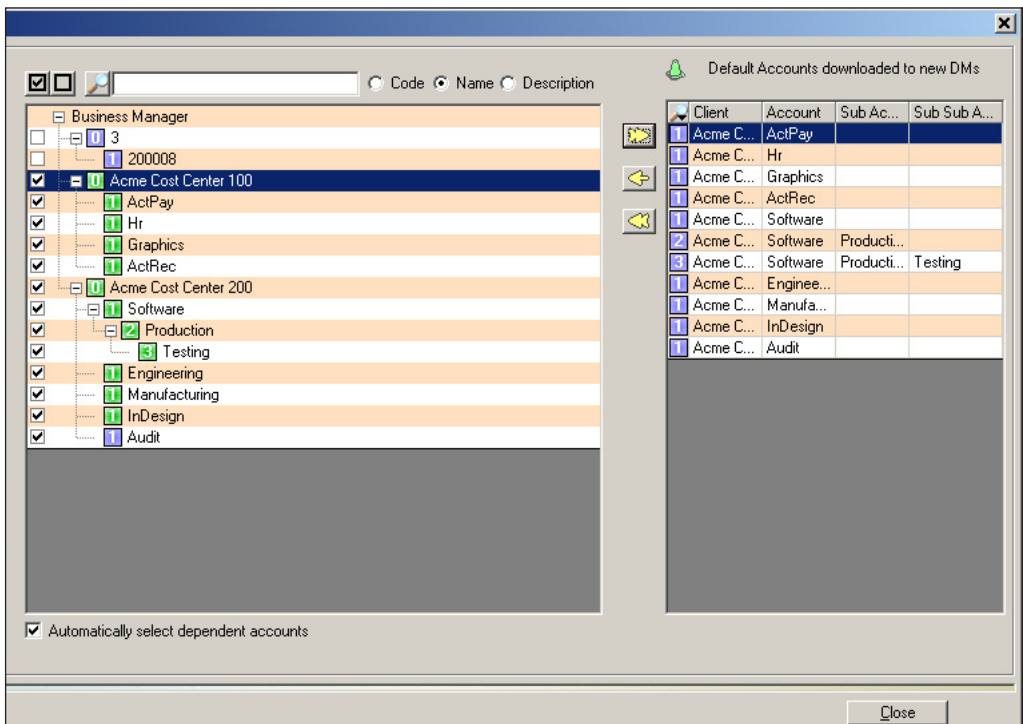
To remove one of the accounts, select it and click on the ⬅ button.

If you want to remove all of the accounts, click on the ⏮ button.

9. Click on the **Close** button at the bottom of the screen to return to the *Clients and Accounts* screen.

Assigning Budgets to Accounts

You assign budgets to accounts at the Business Manager master or local Host PC using the Administration module. You must be a manager to perform this operation.

All account budgets are local. The budget applies only to transactions charged to the account on the Host PC where you defined the budget.

To assign a budget to an account:

1. Select **Parameters | Accounts and clients**. The *Clients and Accounts* screen appears.

2. Click on and select an account, sub account or sub-sub account. If you have a multi-level account, you can only assign the budget to the lowest level of that account.

3. Click on the button to open the *Account management* screen, then click on the **Budget Management** button.

4. Click on the button in the *Management of the budget* screen. This opens the *Parameters for duplication* screen.

5. In the **Seek a budget** field of the *Parameters for duplication* screen, click on the down arrow and select a budget period from the drop-down menu.

Parameters for duplication	
Seek a budget	
	Accounting major period
	Local Host Period
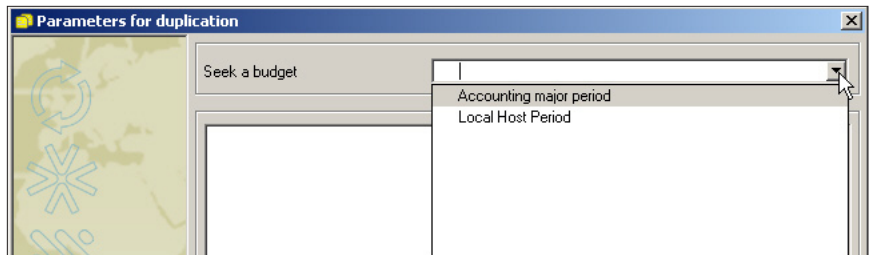
6. As soon as you select one of the budget periods, the name appears in the **Seek a budget field** and is highlighted. You can type in a new name or accept the default name. The budget period information appears in the screen.
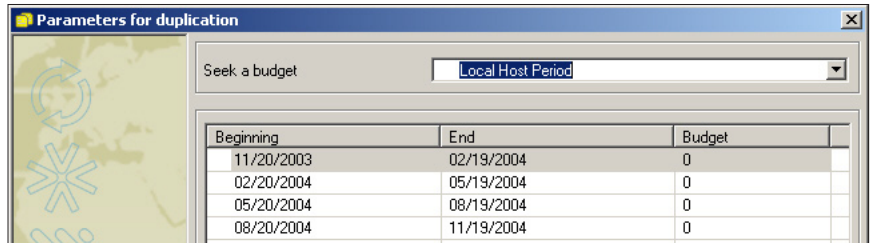
7. Click on the **Confirm** button at the bottom of the screen and the *Management of the budget* screen opens.
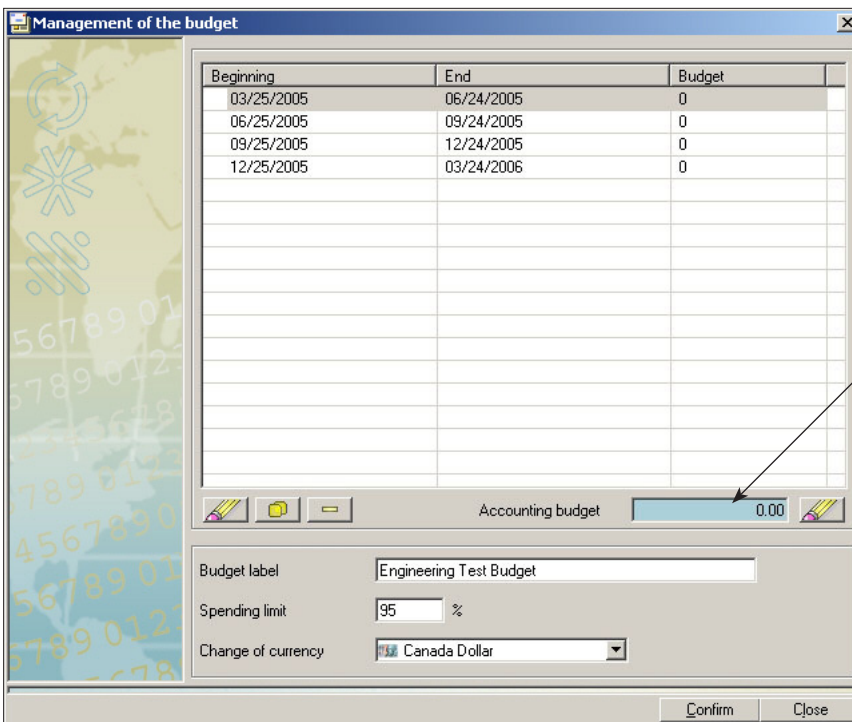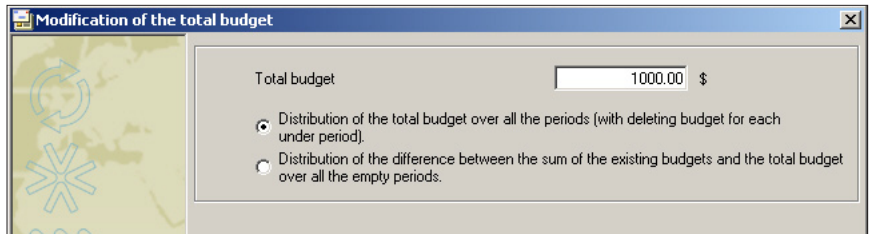

Account Budget field

8. Type a name in the **Budget label** field.

    a. Enter an amount in the **Spending limit** field. If you enter zero, the expenditures charged to this account vs. your budget amount will appear on your reports. If you exceed your budget amount however, you can still charge to this account.

        If you enter an amount such as 90, as soon as your expenditures against this account reach 90% of the budget amount, you will no longer be permitted to charge to this account.

        NOTE: You can specify a value in the range of 50 to 200% of the budget.

        ---

    b. Click on the ![button] button next to the **Accounting budget** field. The *Modification of the total budget* screen opens.

9. Enter the budget amount in the **Total budget** field.

10. Click on the option button corresponding to the method you want to use to distribute the budget over the accounting period. You can:

    • Distribute the total budget over all periods (with deleting budget for each under period), or

    • Distribute the difference between the sum of the existing budgets and the total budget over all empty periods.

11. Click **Confirm**, then **Confirm** again. The amount of the budget appears in the account management screen.

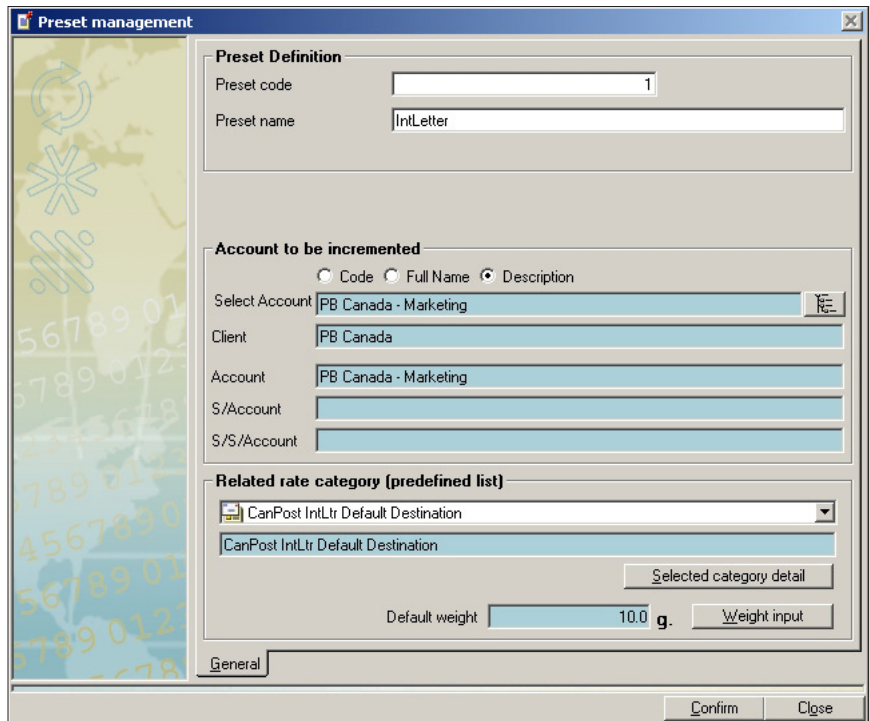12. Click **Confirm** to save and close the budget.

Defining Presets

A preset defines the account that incurs the charges, and all of rate information including the carrier, class and any special services or fees.

You can define presets at the Business Manager Host PC using the Administration module. You must be a manager to perform this operation. To define a preset:

1. Select **Parameters | Presets**. The *Presets* screen opens.

2. Click the 🞣 button. The *Preset management* screen opens.

3. Fill in the **Preset code** and **Preset name** fields.
4. In the "Account to be incremented" section, select an account by clicking on the 🗒 button.

    Remember, if you have multi-level accounts, you can only charge to the lowest level in the account.

5. In the "Related rate category" section, select a predefined rate by clicking on the down arrow. For more information on selecting or creating predefined rates, refer to *Selecting Rates for Processing Mail* in *Chapter 2* of this guide.

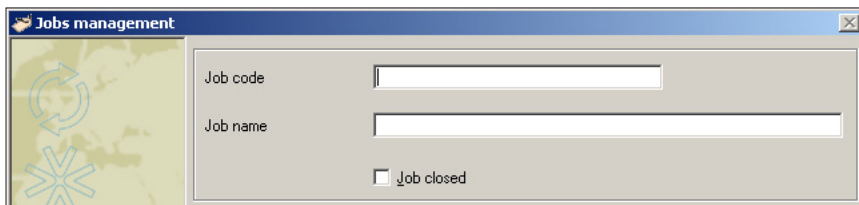6. Click on **Weight input** and enter the weight.

> **IMPORTANT:** You must enter a weight value in order to save a preset. If you do not have a weight, enter **0** in the field.

7. Click **Confirm**, then click **Close**.

Defining Jobs

You can define jobs at the Business Manager Host PC using the Administration module. You must be a manager to perform this operation. To define a job:

1. Select **Parameters | Jobs**. The *Jobs* screen opens.

2. Click the ⊞ button. The *Jobs management* screen opens.

3. Fill in the **Job code** and **Job name** fields. You can enter any combination of letters and numbers for either field.

4. When complete, click **Confirm**.

5. To edit an existing job, select **Parameters | Jobs**, then click on the ✎ button.

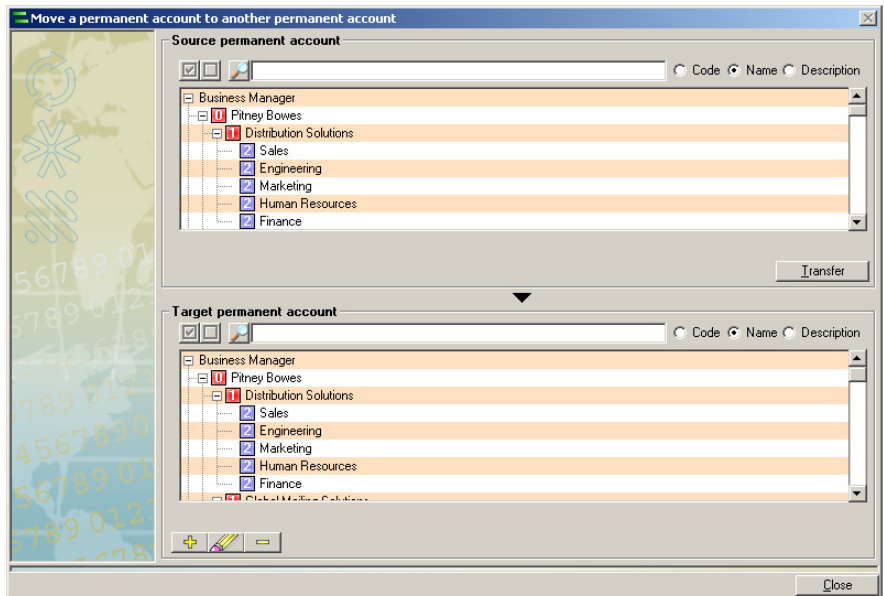6. Make your changes and click **Confirm**.

Moving Account Data

If necessary, you can use the Move feature to move all data from under one account to another account.

> **NOTE:** Account data can only be moved to and from accounts at the same accounting level.

1. Select **Utilities** | **Move an Account**.

2. The *Move a permanent account to another permanent account* screen opens.

3. Scroll through the account list in the *Source permanent account* pane and select the account you want to transfer data from.

4. Scroll through the account list in the *Target permanent account* pane and select the account you want to transfer data to.

5. Click the **Transfer** button.

6. The *Transfer of Account* dialog box appears.
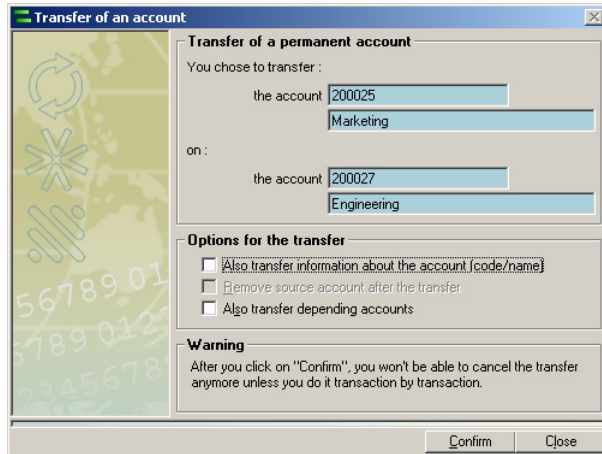
7. Select the appropriate options for the transfer. You can:
   - Transfer information about the account (code/name);
   - Remove the source account after the transfer; and/or
   - Transfer depending accounts.
8. Click **Confirm**.
9. A dialog box appears indicating the transfer is complete. Click **OK**.
10. Click **Close** to exit the *Move a permanent account to another permanent account* screen.

Chapter 4 - Understanding and Setting Operators

Types of Operators   Business Manager has four different types of operators or us-
ers, each one with a different set of rights or privileges.

Operator - can run mail, view and add manual transactions at
the Data Collector PCs. Operators can also run reports from
the Business Manager Host PC using the Administration Mod-
ule.

Manager - can perform all operations at the data collectors
and the administrative functions at the Business Manager Host
PC.

Report User - can view and run reports from the Business
Manager Host PC.

Pitney Bowes® Service - a special access level reserved for
Pitney Bowes® service representatives. You cannot modify this
operator.

Adding or Editing Operators

1. You view, edit or add operators at the Business Manager Host PC using the Administration module. You must be a manager to perform this operation.

2. To view, edit or add operators, select **Parameters | Configuration | Environment | Users**. You are prompted to enter your password.

3. Once you enter your password, the *Users* screen appears and lists all of the current operator login names.
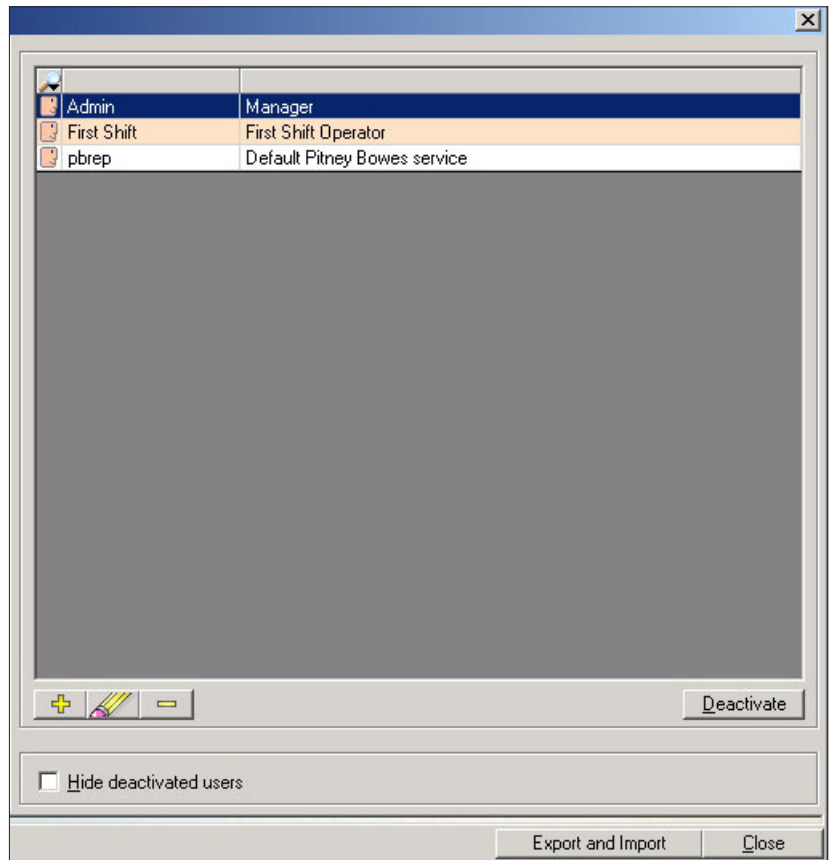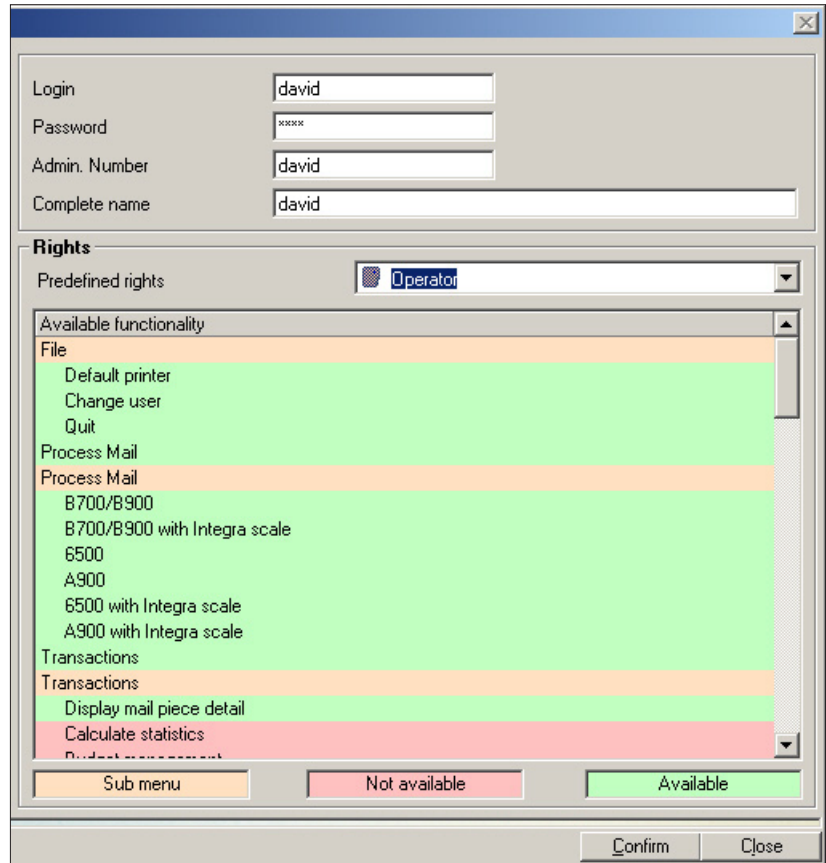

4. To search for an existing operator, click on the ⬜ button and enter the name of the operator in the field over the operator name column.

5. To add a new user, click the ⊞ button.

    To edit an existing operator, click on and select the operator, then click the 🖉 button.

    Clicking on either button opens the *User management* screen.

Login	david
Password	****
Admin. Number	david
Complete name	david

Rights

Predefined rights	🟦 Operator ▾

Available functionality

File
    Default printer
    Change user
    Quit
Process Mail
Process Mail
    B700/B900
    B700/B900 with Integra scale
    6500
    A900
    6500 with Integra scale
    A900 with Integra scale
Transactions
Transactions
    Display mail piece detail
    Calculate statistics

Sub menu	Not available	Available

Confirm   Close

A color key code is at the bottom of the *User Management* screen. This shows the access rights by color. For example, if an operation is highlighted in the same color as "Not available" it means this operator cannot perform the operation.

6. Fill in the information for the new operator, or edit the information for an existing operator:

   IMPORTANT: You can use any combination of letters and numbers in the following fields but do not use any special characters.

   a. **Login ID** - This can be up to a maximum of 50 characters.

   b. **Password** - Use a 4 character password.

   c. **Admin. Number** - this can be an employee identification number. This allows employees to scan their employee numbers to log onto the system. This can be up to 50 characters.

   d. **Complete name** - operator's full name. This can be up to 100 characters.

   e. **Predefined rights** - click on the down arrow to select Operator, Manager, or Report user rights.

      For information on operator rights, see *Types of Operators* in this chapter.

7. To delete an operator, click on and select the operator, then click on the ▭ button.

8. When finished, click on the **Close** button.

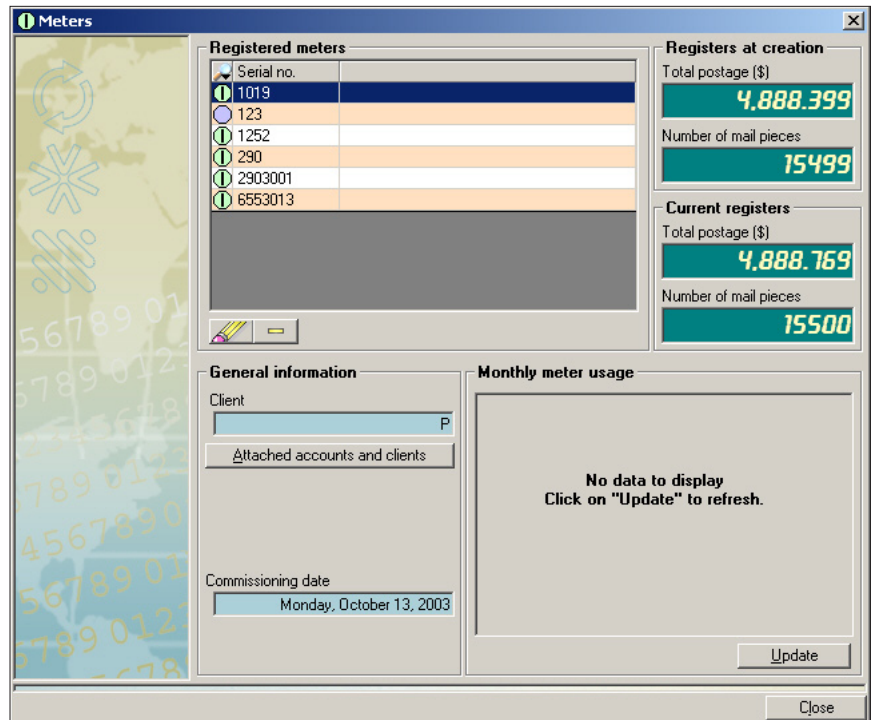# Chapter 5 - Working with Meters and Mail Processors

Viewing Meters Registered at the Business Manager Host

You can view the meters and mailing machines registered at the Business Manager Host PC using the Administration module. You must be a manager to perform this operation.

1. Select **Parameters | Configuration | Meters | View the Meters**. The *Meters* screen opens.


2. To get the details on a specific meter, click on and highlight the meter. This screen displays the postage charged at each meter as well as the number of pieces of mail processed.

3. To view the clients and accounts attached to this Host PC, click on the **Attached accounts and clients** button.

Adding or Editing Meters and Mail Processors

You can view the mail processors connected to each of your Data Collector PCs, add new processors, or free up ports on your Data Collector PC. You must be a manager to perform these operations.

1. At the Data Collector PC, select **Parameters | Configuration | Environment | Peripherals**.

2. When prompted, enter your password. The *Peripherals screen* appears.
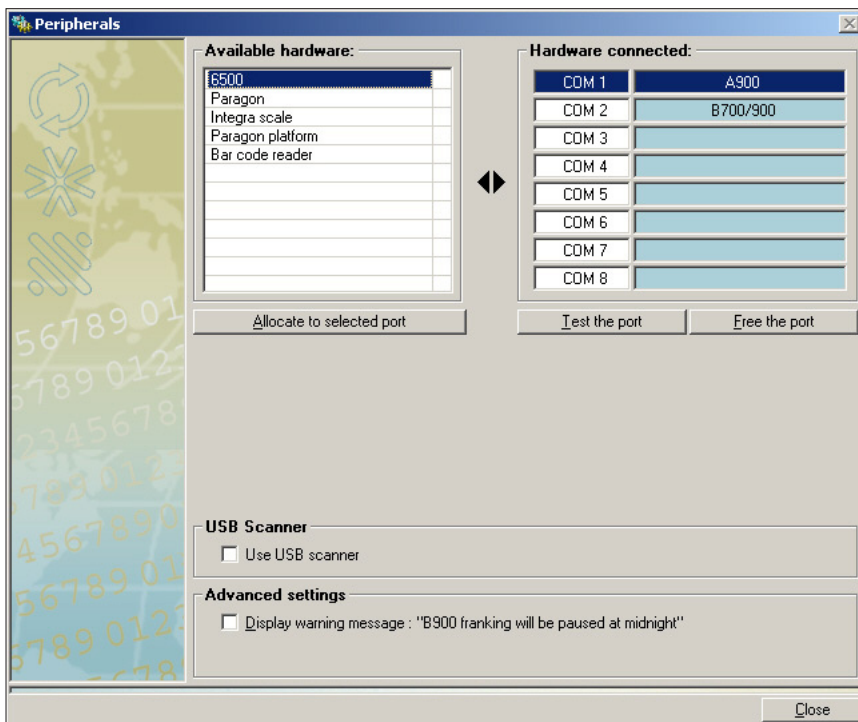
3. The "Available hardware" section lists all of the types of mail processors you can connect to the Data Collector.

   The "Hardware connected" section shows the devices that are currently connected to your Data Collector PC and COM ports to which they are connected.

4. To connect one of the mail processors in the "Available hardware" list to an available COM port, click on and select the item and drag it onto the appropriate COM port in the "Hardware connected" section.

   For example, to add an A900 to the COM 1 port, drag the highlighted A900 onto the "COM 1" text in the "Hardware connected" section.

5. After adding an new processor, click on and highlight the item (for e.g., A900) and click on the **Test the port** button. You must test the port before you can run mail on this processor.

6. To free up an existing COM port, click on and highlight the mail processor connect to the port and click on **Free the port** button.

7. If you have a B900, click in the check box in front of "Display warning message: Checking B900 midnight behavior" if you want to be notified before the B900 starts its routine internal checking. When the B900 performs this internal processing, you cannot use it to run mail.

8. If you are using a barcode reader to scan in your accounts, make sure the check box in front of "Use USB Scanner" has a check mark in it.

Registering a New Meter

You register new meters and mailing machines at the Business Manager Host PC using the Administration module. You must be a manager to perform this operation.

Before you can register a new meter, you first need to add that meter to the appropriate Data Collector PC. Refer to *Adding or Editing Meters and Mail Processors* in this chapter for instructions.

To register a new meter:

1. Select **Parameters | Configuration | Meters | Register a new meter**.

2. A *Register meter* screen appears with the new meter's serial number and postal number already filled in. Verify that the client information is correct or modify as necessary.

3. Click on the **Confirm** button.

Replacing a Meter

In order to replace a meter, you must first release the port on the Data Collector to which the current meter is connected. You perform this at the Data Collector PC. You must be a manager to perform this operation.

1. At the Data Collector PC, select **Parameters | Configuration | Environment | Peripherals**.

2. The *Peripherals* screen appears.
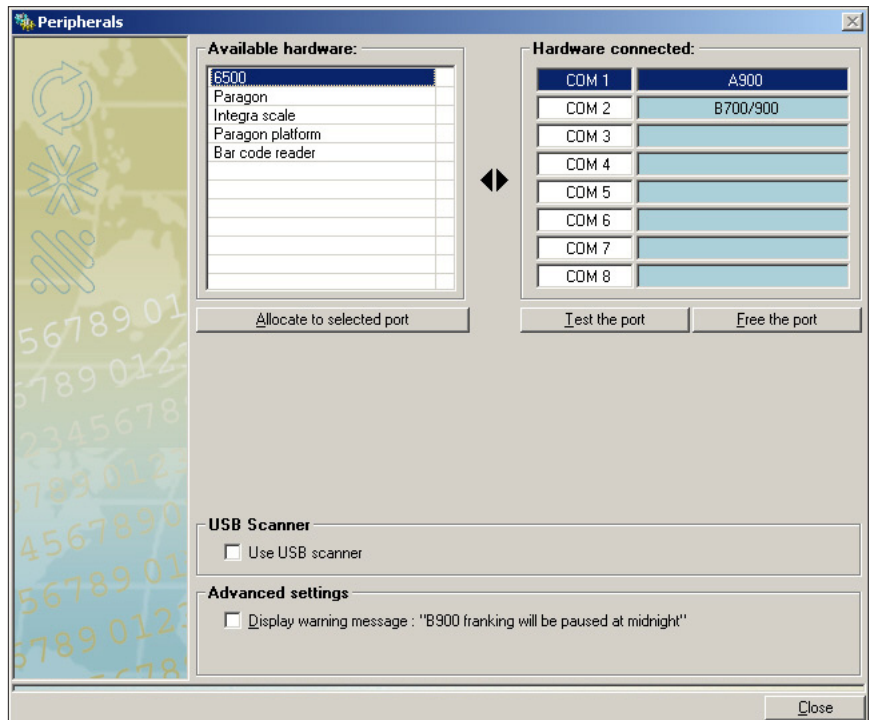
3. In the "Hardware connected" section, click on and select the meter you intend to replace, then click on the **Free the port** button.

4. Select **Parameters | Configuration | Meters | Release a local meter.**

5. You can now add the new meter to the port.

Creating a Virtual Meter for Manual Transactions

In order to enter manual transactions, you need to create a virtual meter. You create a virtual meter at the Business Manager Host PC using the Administration module. You must be a manager to perform this operation.

1. Select **Parameters | Configuration | Meters | Create an additional meter**. The creating a virtual meter screen appears.

2. Enter any number in the **Serial number** field, for example, 500. You can enter only numbers in this field and you cannot enter a value of zero (0).

3. Enter any alphanumeric characters in the **Model number** field.
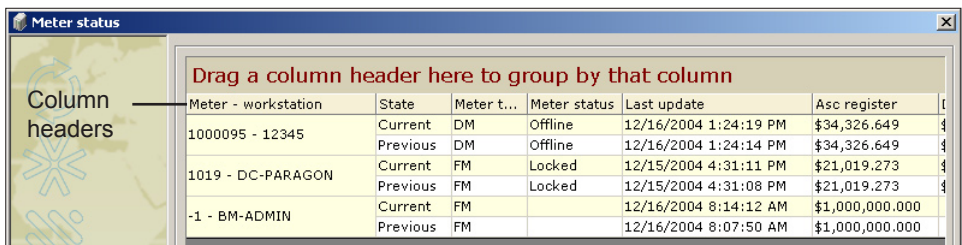
4. Fill in the client information fields.

5. You can also assign this virtual meter to a virtual workstation to help you identify the manual transactions for this virtual meter when generating reports. To do this, select a virtual workstation in the "Use of a virtual workstation" section.

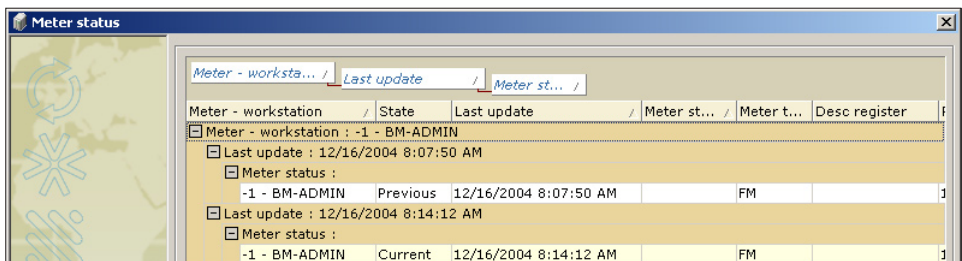6. Click on the **Confirm** button.

Viewing Meter Status

Follow the steps below to view the status of the meters from the Host PC.

1. Select **Parameters | Configuration | Meters | Meter Status**. The *Meter Status* screen opens.

2. Drag and drop the appropriate column header(s) into the blank row at the top of the screen.

3. The meter status information will appear grouped by the column(s) you selected. (In the example below, the status information is grouped first by workstation, then by last update, then by meter status.)

4. To remove a column header from the grouping, click on the appropriate name in the top row, then drag and drop it back into the column header row.

5. Click **Close** to exit the *Meter Status* screen.

Chapter 6 - Working with Carriers, Classes and Fees

Importing Standard Carriers, Classes, and Fees

Business Manager comes with the most commonly used carriers and their standard classes of service, also referred to as Standard Carriers. You perform this operation at the Business Manager Host PC using the Administration module. You must be a manager to perform this operation.

You cannot change any of the Standard Carriers. If you need to modify carrier information, refer to *Adding Customized Carriers, Classes and Fees* in this chapter.

If for any reason you need to reload the Standard Carriers, follow the procedure here.

1. Use Windows Explorer to view the files on the Carrier, Class and Fees disk (floppy or CD) you received with your system. Record the three digit extension number for the files. For example, if you see the files, Mmscar.027, Mmscls.027, and Mmsfee.027, record 027.

2. Select **Parameters | Configuration | Carriers, Classes, and Fees | Import CCF Files**. This opens the *Carrier, Class, Fee Import* screen.

3. Type in the 3-digit extension of the files you viewed in step 1 in the CCF File extension field.

4. Click on the [...] button next to the **Path to CCF files Directory** field and select the location of the CCF (Carrier, Class, Fee) files. These are typically provided with your system on a CD.

5. Click on the **Confirm** button at the bottom of the screen. The system begins importing all of the CCF files and displays them in the "Import processing" box.

6. When the import is complete, click on the **Close** button.

**Adding Customized Carriers, Classes, and Fees**

You can add carriers that are not included with the standard carriers provided with your Business Manager system. You may want to do this to accommodate local trucking companies for example.

You add custom carriers at the Business Manager Host PC using the Administration module. You must be a manager to perform this operation.

1. Select **Parameters | Configuration | Carriers, Classes and Fees | User Defined Carriers, Classes and Fees**. The *Manage User Carrier, Class and Fees* screen appears.
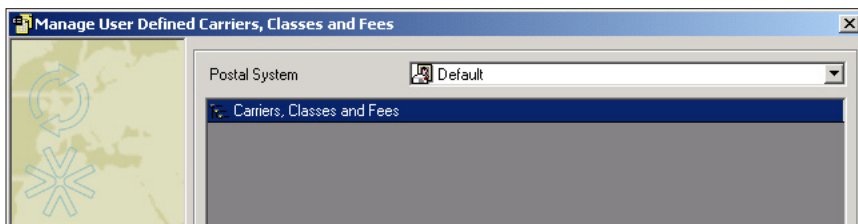

2. To create new carrier, click on and highlight **Classes, Carriers and Fees**, then click on the [+] button at the bottom of the screen. The *Carrier information* screen appears.
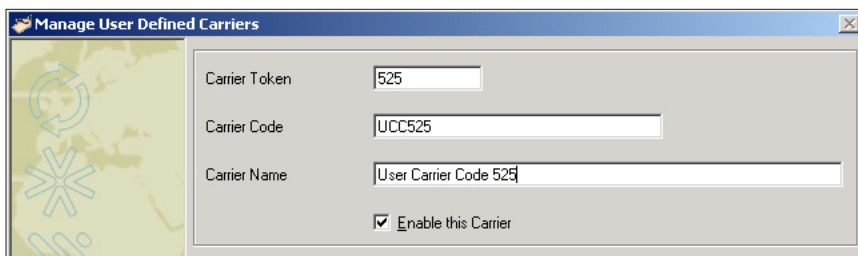

3. The *Carrier information* screen appears. Enter a number value in the **Carrier Token** field. Enter a number and/or letter value in the **Carrier Code** field. The entry in the **Carrier Name** field defaults to the value you enter in the Carrier Code field but you can change this value as well.

4. When complete, click the **Confirm** button at the bottom of the screen.

5. Click on and highlight the new carrier you just created.
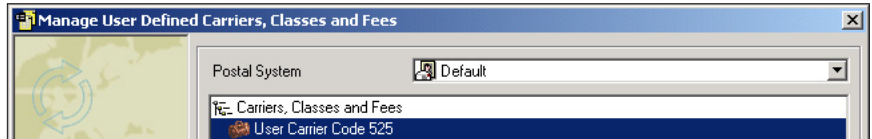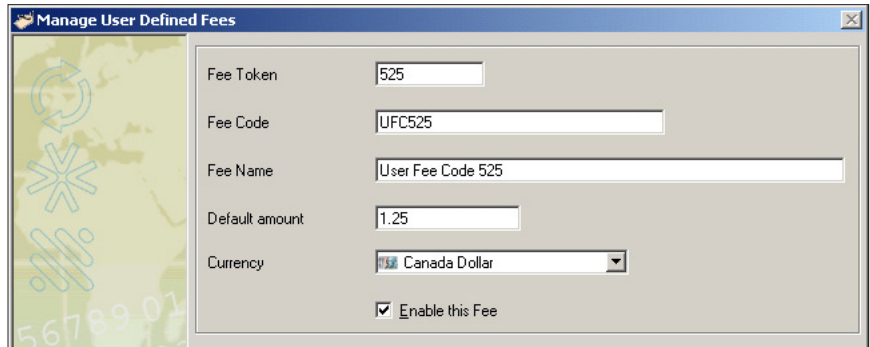

6. Click on the ⊞ button at the bottom of the screen. You are prompted to "Select what kind of addition you want to do".

    To add a class, go to step 7.

    To add a fee, go to step 8.

7. Click on the **Add Class** button to add a new class for this carrier. The *Class information* screen opens.
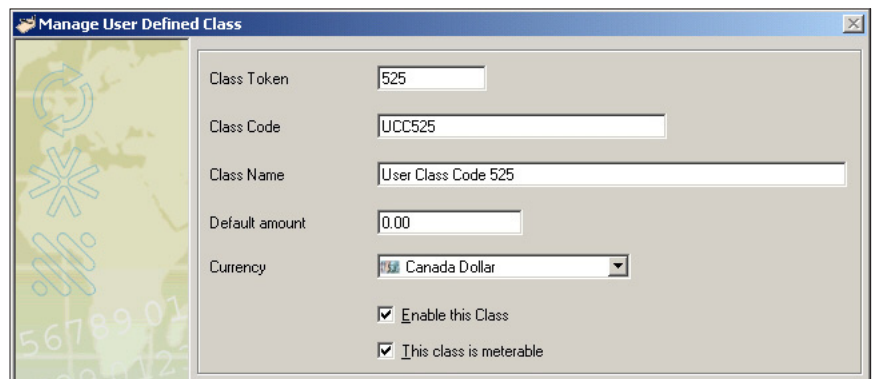
a. Enter a number value in the **Class Token** field.

b. Enter a number value in the **Default amount** field.

c. Make sure the check box in front of **This class is meterable** has a check mark.

d. Click the **Confirm** button at the bottom of the screen to save

8. Click on the **Add Fee** button to add a new fee for this carrier. The *Fee information* screen opens.

a. Enter a number value in the **Fee Token** field.

b. Enter a number in the **Default amount field.**

c. Make sure the check box in front of **Enable this fee** has a check mark.

d. Click the **Confirm** button at the bottom of the screen to save.

Chapter 7 - Working with Transactions

Viewing Transactions

You can view transactions at the Business Manager Host PC using the Administration module. You must be a manager to perform this operation.

You can display all of the information associated with your mail transactions such as the number of pieces, the weight of each piece or mail, the combined weight of all of the transactions, as well as any special fees or surcharges. You use a series of selection criteria or filters to determine what information you want displayed.

Since there are so many different ways you can select to display your transaction data, this section focuses on basic methods for selecting the data and calculating data results.

Once you learn the basic tools, you can customize the display results according to the requirements of your site.

You can also group, sort, and filter your transaction data using multiple criteria and then display the results in table format and in 2-D and 3-D graphic displays. For more information, refer to *Chapter 8, Using the Statistics Module for Analyzing Transactions* in this guide.

Viewing Transaction Details

1. Select **Transactions | Display mail piece detail**. The *Transaction Details* screen appears. There are several options on this screen that allow you to select and display the transactions based on a variety of criteria.

> **IMPORTANT:** Using the options on this screen only changes how you filter and sort information from the transaction database. None of the changes you make here affect or change any transaction data.
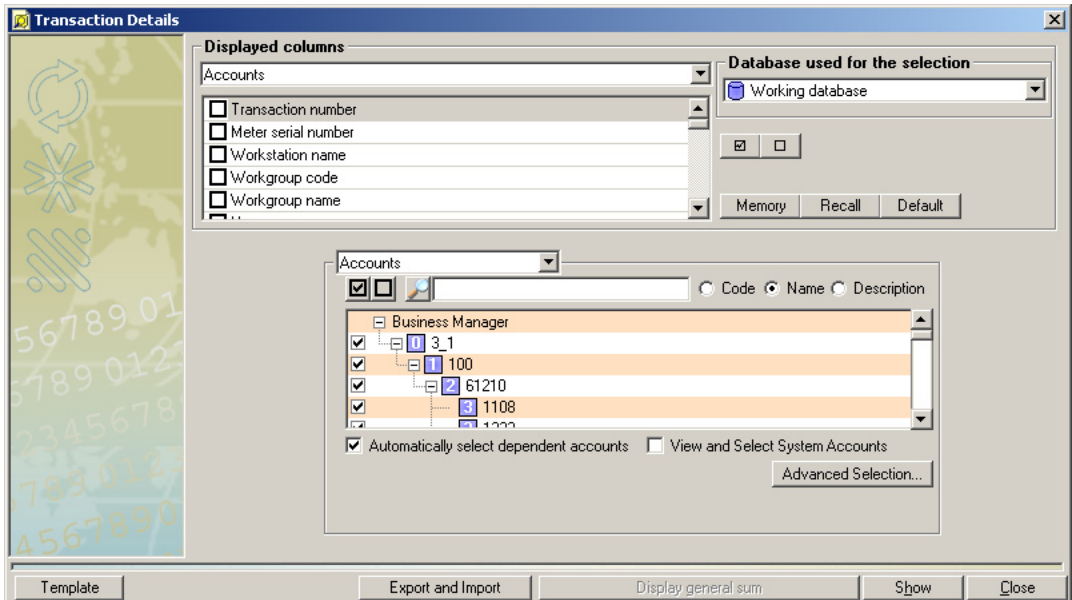

2. In the "Displayed columns" section, you can view all of the transaction items available for display (meter serial number, single piece weight etc.) by scrolling through the list box.

3. Business Manager provides groups of predefined transaction item selections. To view these pre-defined items for a group, click on the down arrow in the field directly below the **Displayed columns** title and select the group from the drop-down list.

    You can view the transaction items for each group by scrolling through the list box.

4. You can add or remove transactions items you want to view by clicking on the corresponding check boxes in front of the items. You can also change the order in which the items appear and save your selections for recall later by using the column selection buttons next to the "Displayed column" section:
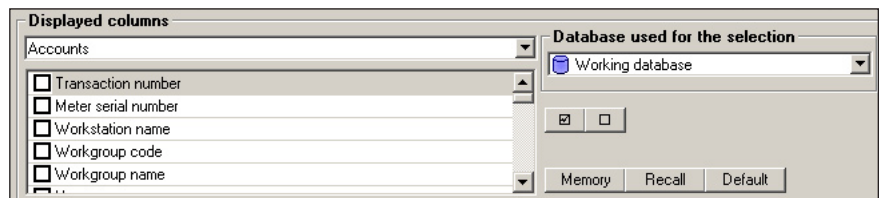
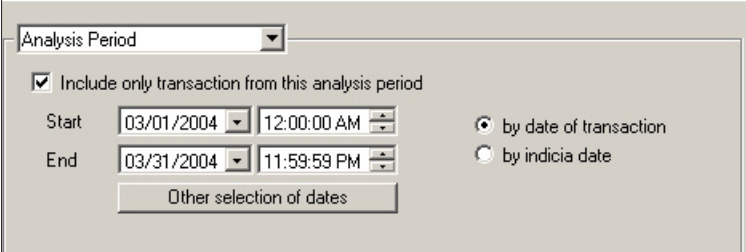|	
☑	Click on this button to select all transaction items for display.
☐	Click on this button to deselect all transaction items.
Memory	Click to save the current selections.
Recall	Click to restore the previous selections.
Default	Click to restore the default selections.

5. You can filter the transaction data you selected in the "Displayed column" section using the fields in the selection criteria area shown here.

- To limit the transactions to a specific date range, click on the check box in front of the "Include only transactions from this analysis period" and fill in the appropriate **Start** and **End** dates.
- To select a specific filter, click in the field containing "Analysis Period" and choose an appropriate filter from the drop-down menu. For example, you can sort the transaction data by Accounts, Carriers and Classes etc.

6. You can save the selections and sort criteria you made in the above steps by clicking on the **Template** button at the bottom of the screen.

   a. Click on **Save as** and type in a name for the template.

   b. Click **Confirm**.

   c. The next time you want to display the transactions using these settings, click on the **Template** button.

   d. Select the name of the template and click **Open**.

7. When you complete your selections, click on the appropriate button at the bottom of the screen:

   a. The **Calculate** button displays the results in a new screen.

      > **NOTE:** You can view the details of a specific transaction by double-clicking on the row containing the transaction.

   b. The **Display general sum** button shows the sums for all of the selected fees (for example, postage fee amount, surcharge amount etc.)

   c. **Export and Import** button allows you to export the results of your selections to a comma delimited file (CSV), or to a fixed length text (ASCII) file. For more information on importing and exporting, refer to *Chapter 12, Exporting and Importing Data* in this guide.

8. Refer to *Viewing Transactions: An Example* in this section.

Viewing Transactions: An Example

1. Make your selections in the *Transaction Details* screen.

1. Select pre-defined transaction group here
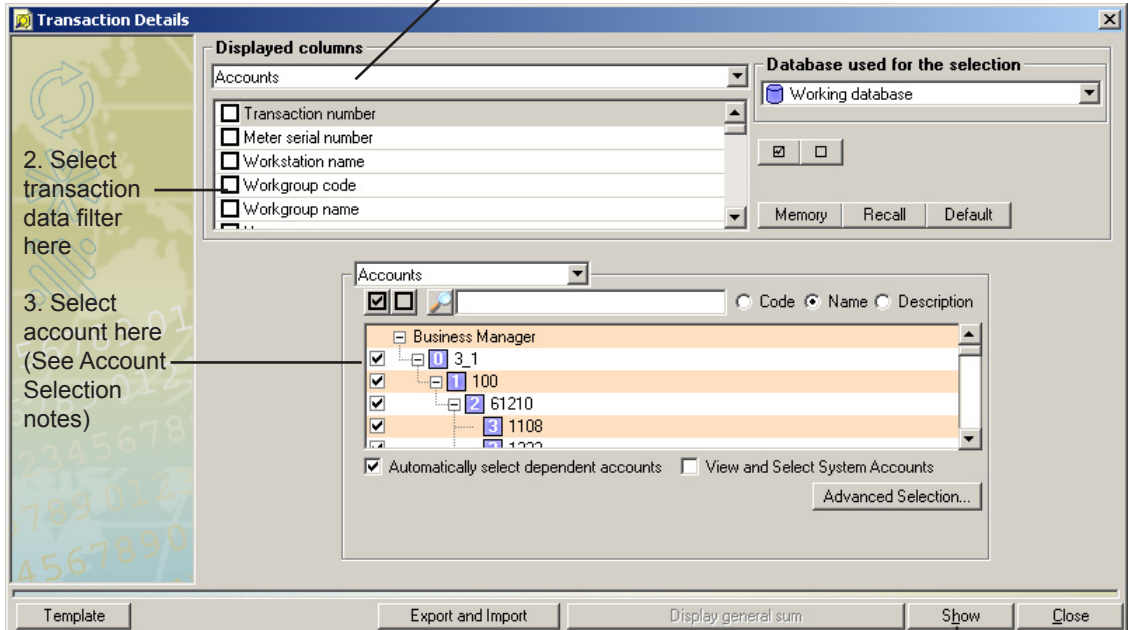
2. Select transaction data filter here

3. Select account here (See Account Selection notes)

4. Click **Show**

ACCOUNT SELECTION NOTES:

- To select all of the accounts, click on the ☑ icon directly under the Account field.

- To select individual accounts, click in the box in front of each account.

- To select all of the accounts and sub accounts for a client, make sure there is a check mark in the box in front of "Automatically select dependent accounts".

- To search and select from the list of available accounts click the **Advanced Selection** button. Refer to *Chapter 10, Advanced Account Selection* for more information.

- To view all of the voided or modified transactions that are assigned to the system account named 00007, make sure there is a check mark in the box in front of "View and Select System Accounts".

---

2. Click **Show** to view the results.

> **NOTES:**
>
> • The results are grouped by batch. Within each batch, one or two transactions will be present, depending on the post-age mode and class selected. The mail piece details are grouped within the transaction(s).
>
> • Click the ⊞ button to expand a single level, or click the **Expand All** button to expand all levels at once.
>
> • Click the ⊟ button to collapse a single level, or click the **Collapse All** button to collapse all levels at once.
>
> • Column headings and order are based on the selections you make on the *Transaction Details* screen.

Batch Level View

Batch level
column headings

Batches

⊟ Start Date	End Date	Total Pieces	Total Postage
⊞ 08/05/2004 1:46:37 PM	08/05/2004 1:46:37 PM	1	13.35
⊞ 08/05/2004 1:46:37 PM	08/05/2004 1:46:37 PM	2	9
⊞ 08/05/2004 1:53:02 PM	08/05/2004 1:53:02 PM	70	32.9
⊞ 08/05/2004 1:53:02 PM	08/05/2004 1:53:02 PM	23	8.51
⊞ 08/05/2004 2:11:01 PM	08/05/2004 2:11:01 PM	4	28
⊞ 08/05/2004 3:13:04 PM	08/05/2004 3:13:28 PM	15	13.89

Transaction Level View

Transaction
level column
headings

First
transaction

Second
transaction

⊟ Start Date	End Date	Total Pieces	Total Postage
⌊⊟ Trans.	Global surcharge	Account surcharge	Class surcharge
⊞ 08/05/2004 1:46:37 PM	08/05/2004 1:46:37 PM	1	13.35
⊞ 08/05/2004 1:46:37 PM	08/05/2004 1:46:37 PM	2	9
⊞ 08/05/2004 1:53:02 PM	08/05/2004 1:53:02 PM	70	32.9
⊞ 08/05/2004 1:53:02 PM	08/05/2004 1:53:02 PM	23	8.51
⊞ 08/05/2004 2:11:01 PM	08/05/2004 2:11:01 PM	4	28
⊟ 08/05/2004 3:13:04 PM	08/05/2004 3:13:28 PM	15	13.89
⌊⊞ 1	0	0	0
⌊⊞ 2	0	0	0

Mail Piece Detail Level View

	Start Date	End Date	Total Pieces	Total Postage
	Trans.	Global surcharge	Account surcharge	Class surcharge
	Number	*Weight*	*Basic*	*Fees*
⊞	08/05/2004 1:46:37 PM	08/05/2004 1:46:37 PM	1	13.35
⊞	08/05/2004 1:46:37 PM	08/05/2004 1:46:37 PM	2	9
⊞	08/05/2004 1:53:02 PM	08/05/2004 1:53:02 PM	70	32.9
⊞	08/05/2004 1:53:02 PM	08/05/2004 1:53:02 PM	23	8.51
⊞	08/05/2004 2:11:01 PM	08/05/2004 2:11:01 PM	4	28
⊟	08/05/2004 3:13:04 PM	08/05/2004 3:13:28 PM	15	13.89
⊟ 1		0	0	0
1		*5.2*	*1.52*	*0*
1		*1*	*0.37*	*0*
5		*0.2*	*0.37*	*0*
2		*0.7*	*0.37*	*0*
2		*0.5*	*0.37*	*0*
1		*1.2*	*0.6*	*0*
1		*0.4*	*0.37*	*0*
⊟ 2		0	0	0
2		*15.7*	*3.85*	*0*

Labels pointing to the table:
- Mail piece detail level column headings
- Mail piece details (first transaction)
- Mail piece details (second transaction)

Correcting Transactions

This section describes how to void transactions or modify the information associated with each transaction such as its account number, carrier and class, number of pieces of mail, the weight of each piece or mail, as well as any fees or surcharges.

You perform these operations as a manager at the Business Manager Host PC using the Administration module.

Refer to the following appropriate procedure in this section:

• Editing or Voiding Transactions

• Splitting Transactions Between Accounts

• Correcting Unverified Transactions

Editing or Voiding Transactions	If after running transactions at a Data Collector PC you decide you want to void or modify information about those transactions follow the procedure here. Note that when you void a transaction, those transactions are no longer charged to an account but they are still deducted from the meter register.

1. Select **Transactions | Correct transactions | Edit/Void Transactions**. The *Browsing data* screen appears.
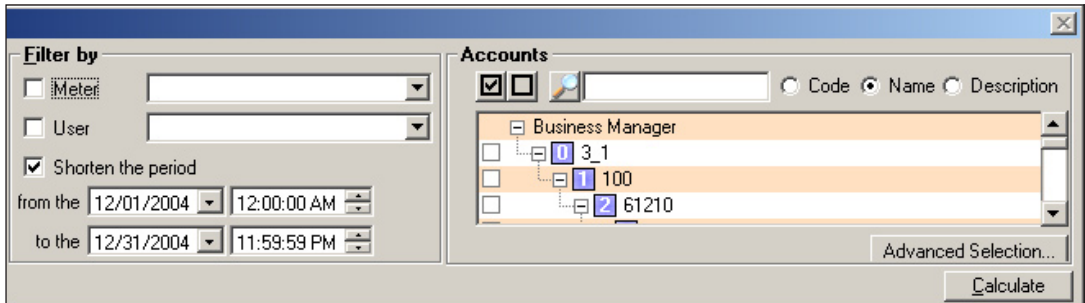
2. Select the how you want to filter the transaction data, by mailing peripheral (Meter) or operator (User) in the "Filter by" box.

3. To view the account or accounts to which the transactions were charged, use the "Account" section of the screen:

    a. To select all clients and accounts, click on the ☑ button.

    b. To select all of the accounts associated with a single client, click on the box in front of the client name.

    c. To select a single account, click on the box in front of the account name or code.

    d. If you want to deselect all accounts and clients, click on the ☐ button.

    e. To search through and filter the account list, click on the Advanced Selection button. See *Advanced Account Selection* in *Chapter 10* for details.

4. Click on the **Calculate** button to get a list of all the transactions based on the selection criteria in steps 2 and 3.
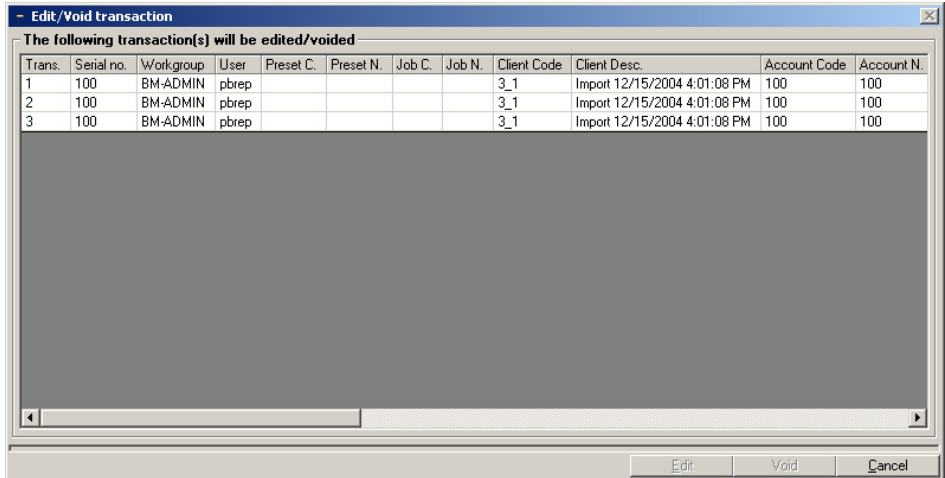

5. Click on and select the transaction(s) you want to edit or void. To select more that one transaction, use the Shift or Ctrl key in the same way you would in selecting multiple files in Windows.

6. Once you select the transactions, click the **Confirm** button at the bottom of the screen and the *Edit/Void Transaction* screen opens and lists the transactions.

7. Click on and select the transaction you want to void or edit. The Edit and Void buttons become available.

8. To void a transaction, click on the **Void** button at the bottom of the screen. The following message displays:

    "The operation has been saved".

    Click **OK** to complete the void operation.

9. To edit a transaction, click on the **Edit** button. The *Mail Piece Detail* screen opens.

10. Use the *Mail Piece Detail* screen to modify the transaction information.

    For example:

    a. **To change the account** to which the transactions are charged, click on the account selection button [icon] in the "Accounts" section and select another account, then click **Confirm**.

    b. **To change the associated preset, job, or user-defined information**, click the appropriate drop-down arrow and select an option from the list.

    c. **To remove the associated preset, job, or user-defined information**, click the delete button [icon].
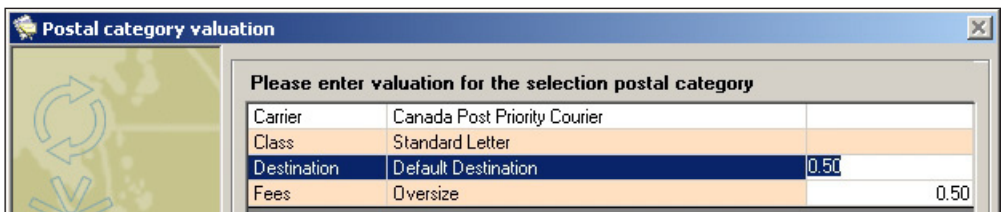
c. **To change the weight, base postage amount, or the number of pieces of mail** in the transaction, click on the **Change Base Details** button. The *Information by Weight* screen opens. Click in the appropriate field and type in a value. Click **Confirm** at the bottom of the screen when done.

	Unit Weight	Base Amount	Number of Pieces	Upper Bound
	0.100	3.850	11	0.000

Transaction Base Details

d. **To change the fees**, click on the **Change Fee Amounts** button. The *Postal category valuation* screen opens. The list of fees you can change depends on the carrier for this transaction.

Click in the appropriate field and type in a new value. Click **Confirm** at the bottom of the screen when done.

Postal category valuation

Please enter valuation for the selection postal category

Carrier	Canada Post Priority Courier	
Class	Standard Letter	
Destination	Default Destination	0.50
Fees	Oversize	0.50

e. **To change the carrier and class or fee**, click on the **Change Rates and Fees** button in the "Advanced Information" section. For details refer to *Selecting Rates for Processing Mail* in *Chapter 2* of this guide.

11. When you are finished editing the transaction, click **Confirm** at the bottom of the *Mail piece detail* screen and the following message displays:

"The operation has been saved".

Click **OK** and the *Browsing data* screen reappears.

Splitting Transactions Between Accounts

If after running transactions at a Data Collector PC you decide you want to assign some of those transactions to another account follow the procedure here.

1. Select **Transactions | Correct transactions | Split a transaction**. The *Browsing data* screen appears.
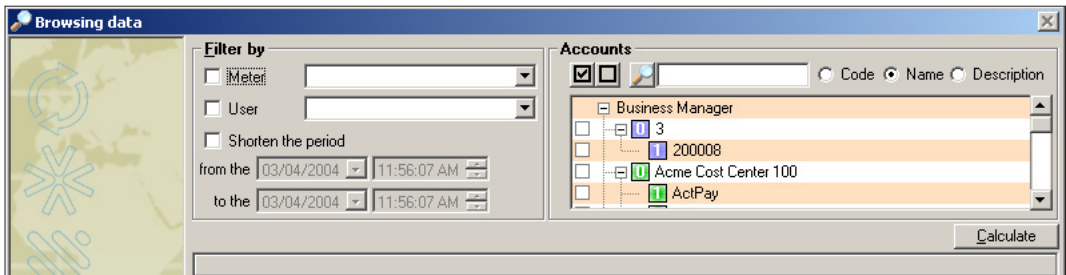
2. Select how you want to filter the transaction data, by mailing peripheral (Meter) or operator (User) in the "Filter by" box. You can also change the time period.

3. Specify the account or accounts to which the transactions were charged in the "Account" section of the screen.

   a. To select all clients and accounts, click on the ☑ button.

   b. To select all of the accounts associated with a single client, click on the box in front of the client name.

   c. To select a single account, click on the box in front of the account name or code.

   d. If you want to deselect all accounts and clients, click on the ☐ button.

4. Click on the **Calculate** button to get a list of all the transactions based on your selection criteria in steps 2 and 3.
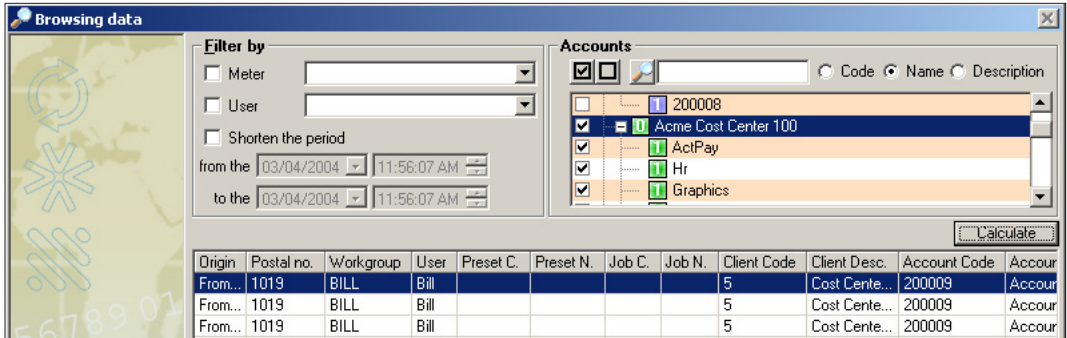
5. Select the transaction you want to split. Click on the **Confirm** button at the bottom of the screen.

6. The *Split a transaction* screen opens.
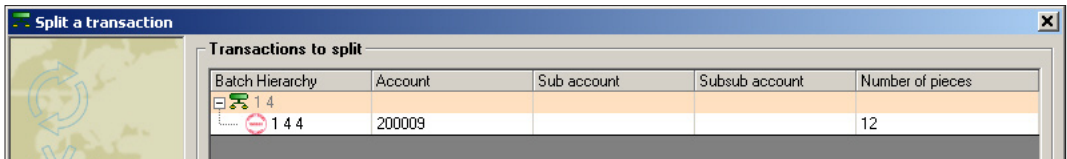
7. Select the transaction you want to split (in this example, account 20009) and click on the [icon] button at the bottom of this screen.

8. The *New transactions to be created* screen opens.
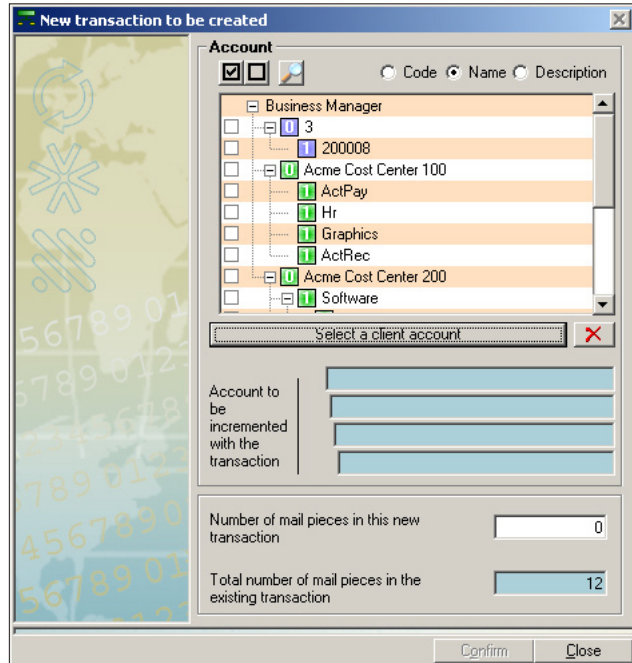
9. In the "Account" section click on the box in front of the name of the account to which you want to charge some of the pieces of mail in the current transaction.

10. Click on the **Select a client account** button.

11. Specify the number of mail pieces in this transaction you want to assign to the new account.

12. Click on the **Confirm** button. The *Split a transaction* screen reappears with the new account/transaction.
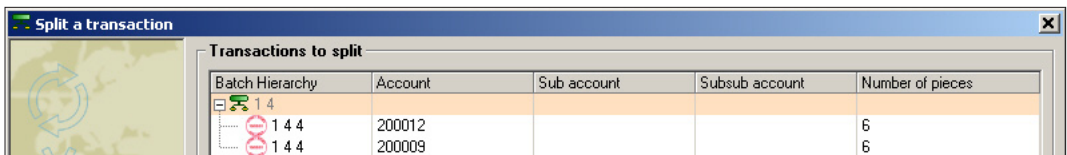
13. Click **Confirm** at the bottom of the screen and the message "The split has been saved" appears.

14. Click **OK**, then **Cancel** to exit this screen.

Correcting
Unverified
Transactions

If for any reason an account is deleted or disabled on Business Manager and you charge transactions to that account on a DM Series™ Digital Mailing System, you will get an unverified transactions message when those transactions are sent from the mailing system to Business Manager.

1. To view and correct unverified transactions, select **Transactions | Correct transactions | Unverified Transactions**.

2. Select an account to which you want to charge the transactions and then click on the **Apply the changes to the selection** button.

Adding Manual Transactions

Before you can add manual transactions, you must have a meter connected to your Data Collector PC that is also registered with the Business Manager Host PC, or you need to create a virtual meter to which you can assign the transactions. For information on adding a virtual meter, see *Creating a Virtual Meter for Manual Transactions* in *Chapter 5* in this guide.

You can add manual transactions at the Business Manager Host PC using the Administration module, or you can add them at the Data Collector PC as an operator. To create a manual transaction:

1. If you are at the Host PC, select **Transactions | Manual input**. If you are logged onto one of the Data Collector PC PCs, click on the **Manual input** button at the bottom of the *Process mail* screen.

   The *Manual input* screen opens.

   > **NOTE:** If a field is enclosed in a red box, you must enter information in the field in order to process the transaction.

2. In the "Transaction Type" section click the radio button that corresponds with the mode you want to use.

   • Click the **Per Piece** radio button to enter postage information that will be applied to each piece of mail that is run as part of the transaction.

   • Click the **Transaction Total** radio button to enter postage information for the entire transaction.

3. Click in the **Postal No**. field and select the virtual meter.

4. In the "Account to be incremented" section select an account by clicking on the select account (🗲) button. Remember, if you have multi-level accounts you can only charge to the lowest level in the account. Click **Confirm**.

5. Select the rate, class and any special fees in the "Rate Category" section.

   • If you have pre-defined rate categories, click on the down arrow in the **Predefined** field and choose a category.

   • For other rates, click on the selected rates (📲) button. Refer to Selecting *Rates for Processing Mail* in *Chapter 2* in this guide for details.

   > **NOTE:** If you selected *Transaction Total* in step 2, you will not be able to select special fees.

6. If you are not using presets, go to step 7.

   If you have defined optional presets, you can click on the down arrow in the **Name** field of the "Preset" section and choose the appropriate preset. This fills in all of the information in the "Account", "Job" and "Rates category" sections. The *Postal category valuation* screen appears with a place for you to enter the postage amount. Enter the amount and press the **Done** button.

7. If appropriate, fill in the information in the "Dates" section.

8. To select a job, click on the down arrow in the in the **Name** field of the "Job" section and choose from the list of pre-defined jobs.

9. If appropriate, enter text in the "User-Defined Text" section.

10. To add weight information, click on the **Enter Weight** button. Type in the weight and click **Confirm**.

11. To add a surcharge to the transaction, click on the **Surcharges** button. Enter the surcharge information and click **Confirm**.

12. If you selected the *Per Piece* transaction type, you will need to enter the following information in the "Postage ($) and Pieces" section:

"Postage ($) and Pieces" Section - Per Piece Selected

- Enter the base postage amount in the **Base Amount** field.

- If you are applying fees to the transaction, click the button. Enter the appropriate amount(s) and click **Done**.

- Enter the number of pieces in the **Piece Count** field. The "Total Amount" section will populate with the total postage amount.

- Click on the **Create transaction** button. A dialog box appears with the values/information you selected for the transaction.

- Click **Create**. Business Manager saves the transaction information and returns to the *Manual Input* screen.

13. If you selected the *Transaction Total* transaction type, you will need to enter the following information in the "Postage ($) and Pieces" section:

"Postage ($) and Pieces Section - Transaction Total Selected

- Enter the total amount of the transaction in the **Total Amount** field.
- Enter the piece count in the **Piece Count** field.

   NOTE: You cannot apply fees in Transaction Total mode. As a result, the "Fee Amount" is set to zero.

   The "Base Amount" section will populate with the per piece postage amount.

- Click the **Create Transaction** button.

- If the total amount cannot be divided evenly by the number of pieces, a dialog box will appear. Click **OK** to continue.

> **NOTE:** If the total amount divided by the number of pieces in uneven, Business Manager will create two separate transactions.
>
> - The first transaction (Transaction 1) will be rounded to the *closest* amount (above or below) the transaction amount that can be divided evenly by the number of pieces.
> - The second transaction (Transaction 2) includes the remainder (negative if Transaction 1 is greater than the total amount, positive if Transaction 1 is less than the total amount).
>
> The sum of the postage amounts in Transaction 1 and Transaction 2 will be equal to the total amount you entered.

- A dialog box appears with the values/information you selected for the transaction. Click **Create**.
- If Business Manager created a second transaction, another dialog box will appear. Click **Create** to continue
- Business Manager saves the transaction information and returns to the *Manual Input* screen.
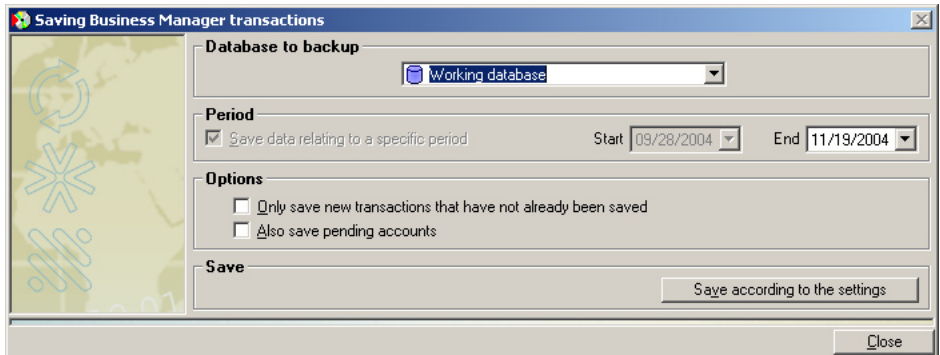
Archiving Transactions

The Save Transactions feature allows you to send data from the working database to a separate archiving database.

> **NOTE:** Data from the Host database (in host to host setups) can be saved to a separate database as well.

Follow the steps below to save Business Manager transactions.

1. From the Business Manager main menu, select **Utilities | Maintenance | Save Transactions**.

2. The *Saving Business Manager transactions* screen appears.

3. Select the appropriate settings.

4. Click the **Save according to the settings** button. The system will save transactions according to the settings you selected.

5. Click **Close**.

Chapter 8 - Using the Statistics Module

Analyzing Transaction Data

Business Manager's statistics application allows you to group, sort, and filter your transaction data using multiple criteria. You can then display the results in table format and in 2-D and 3-D graphic displays. You analyze the transaction data from either you current working database, or an archived database.

Since the statistics application offers so many different ways to group, compare, and display your transaction data, the procedure and example described here focuses on how to use the main functions of this application. Once you understand how to use these functions you can experiment with the application to customize your analyses.

IMPORTANT: Using the statistics application only changes how you group, relate and display information from the transaction database. None of the changes you make here affect or change any transaction data.

You access the statistics application at the Business Manager Host PC using the Administration module. You must be a manager to perform this operation.

1. Select **Transactions | Calculate statistics**. The *Statistics* screen appears.

2. The "Row" and "Column" section of the screen allows you to select one group of transaction data and relate it to another.

3. As soon as you select an option from the "Row", the selection options displayed between the "Row" and "Column" sections changes to reflect the option.

    a. For example, if you select the **Accounts** option, this section changes to show all the available accounts.

        NOTE: Select accounts as described in *Viewing Transactions: An Example* in Chapter 7 in this guide.
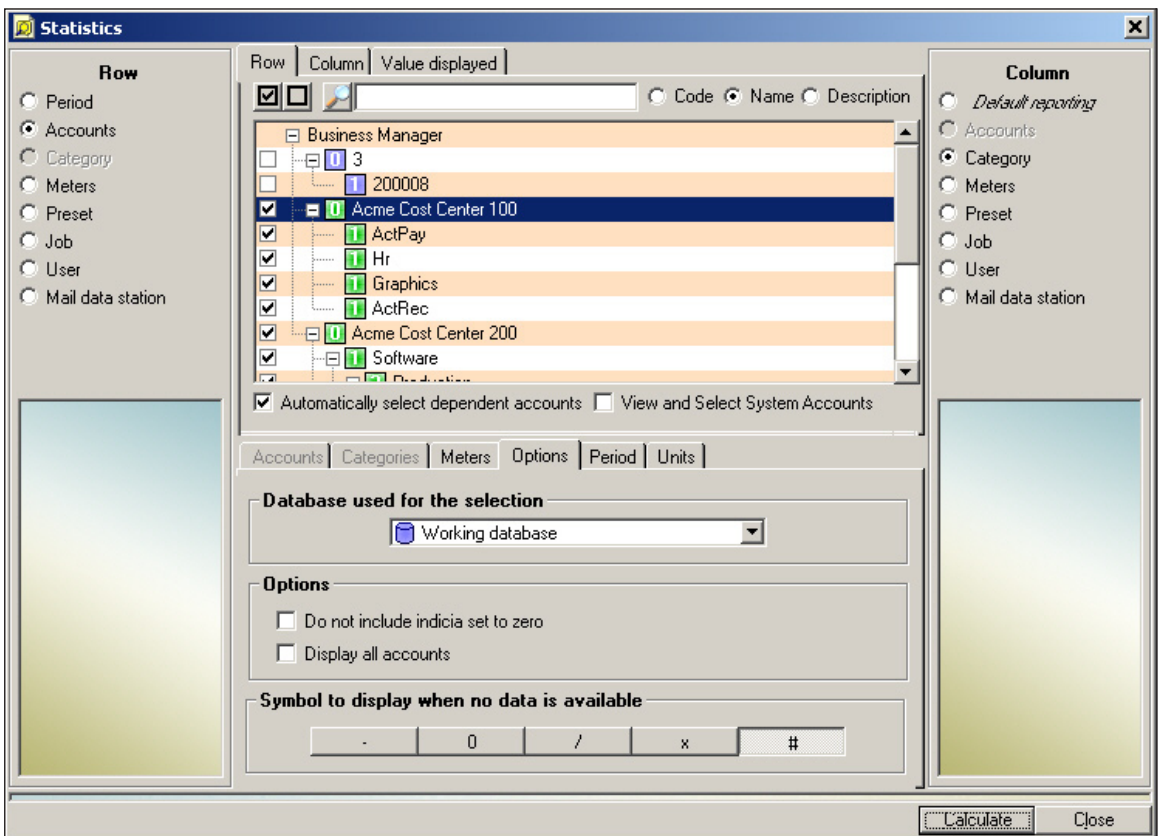
b. Selecting an option like **Category** in the "Column" section retrieves the carrier and class information for all of the accounts selected for the "Row".
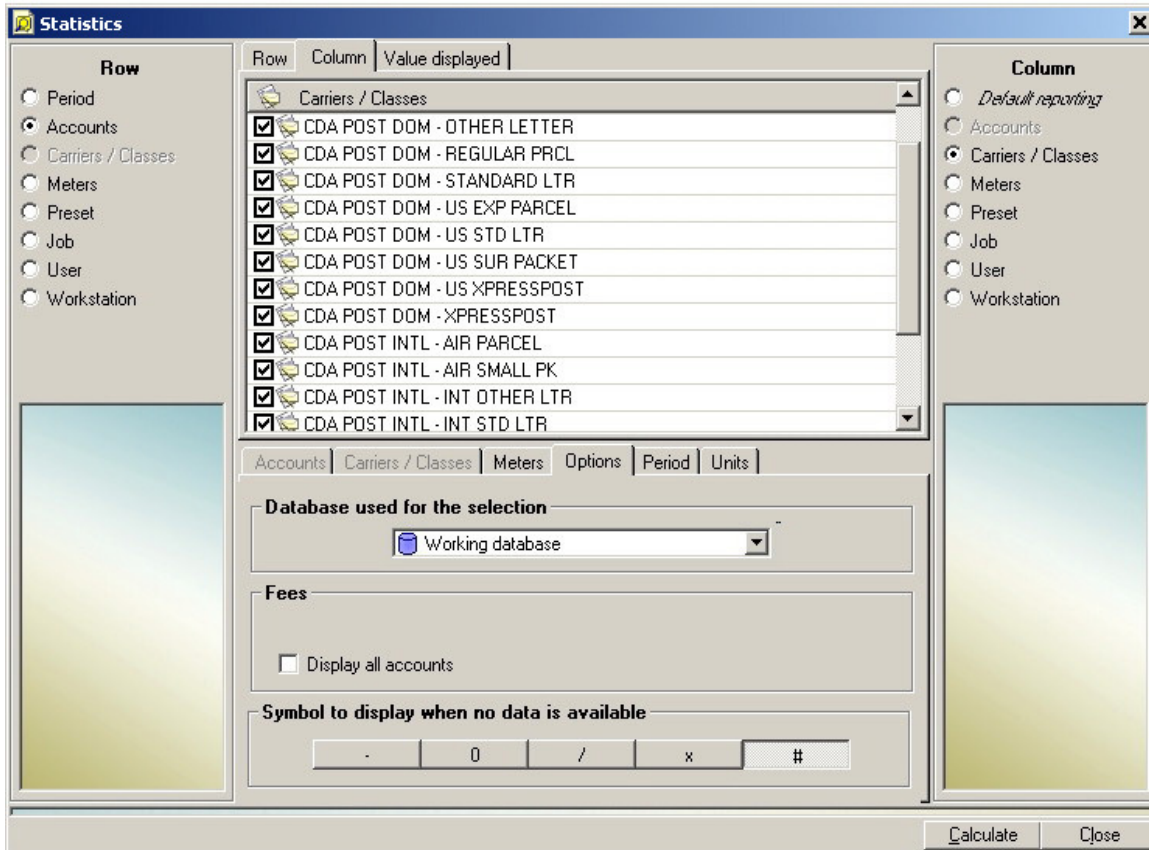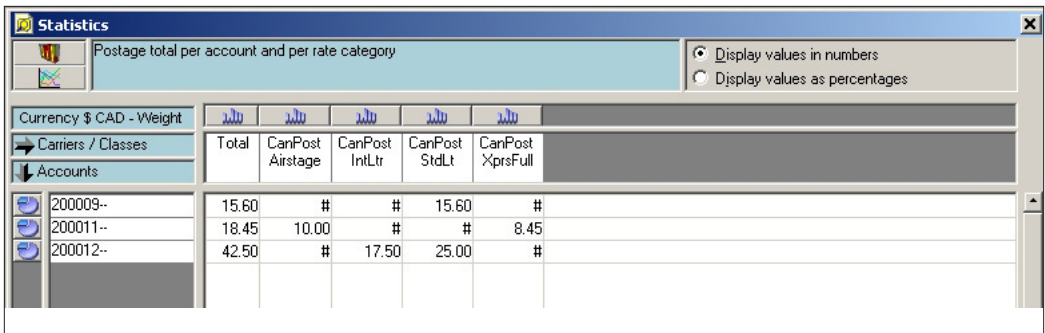
4. Click on an active tab in the lower statistics screen to choose additional selection criteria. Depending on the selections you make in the "Row" and "Column" sections, some of the tabs may be dimmed out indicating that these options are no longer available. For example, if you select the **Accounts** option in the "Row" section, and **Category** in the "Column" section, the tabs for these options are dimmed out in this section.

5. The **Options** tab allows you to select either your current working database or an archived database. To select an archived database, click in the "Database used for the selection" field and choose the archived database from the drop-down menu.

    To change the period of time over which you want to analyze the transaction data, click on the **Period** tab and make your selection.

6. Once you are satisfied with your selections, click on the **Calculate** button at the bottom of the *Statistics* screen.

7. The first calculated screen displays the information in a statistics table form. In our example here, we have retrieved all of the accounts and matched them against their categories (carrier and class). The table shows the total postage amount charged to each account, and the postage amounts for each rate category.

	Total	CanPost Airstage	CanPost IntLtr	CanPost StdLt	CanPost XprsFull
200009--	15.60	#	#	15.60	#
200011--	18.45	10.00	#	#	8.45
200012--	42.50	#	17.50	25.00	#

8. If you want to export the calculated statistics, click on the **Export** button at the bottom of the table form screen (not shown in the above example). It shows the values and labels to be exported in another screen.

9. If you are satisfied with the data, press the **Export** button at the bottom of this screen and select the location and name of the file for export. The file is saved in a CSV format.

10. To view the calculated statistics in other formats:

   • **In a 3-D pie chart format:** click on the 🔵 button in the "Account" column. In this example, the amount of postage charged for each category for a particular account is shown. Use the up and down arrows at the bottom of the pie chart screen to control the perspective of the pie chart.
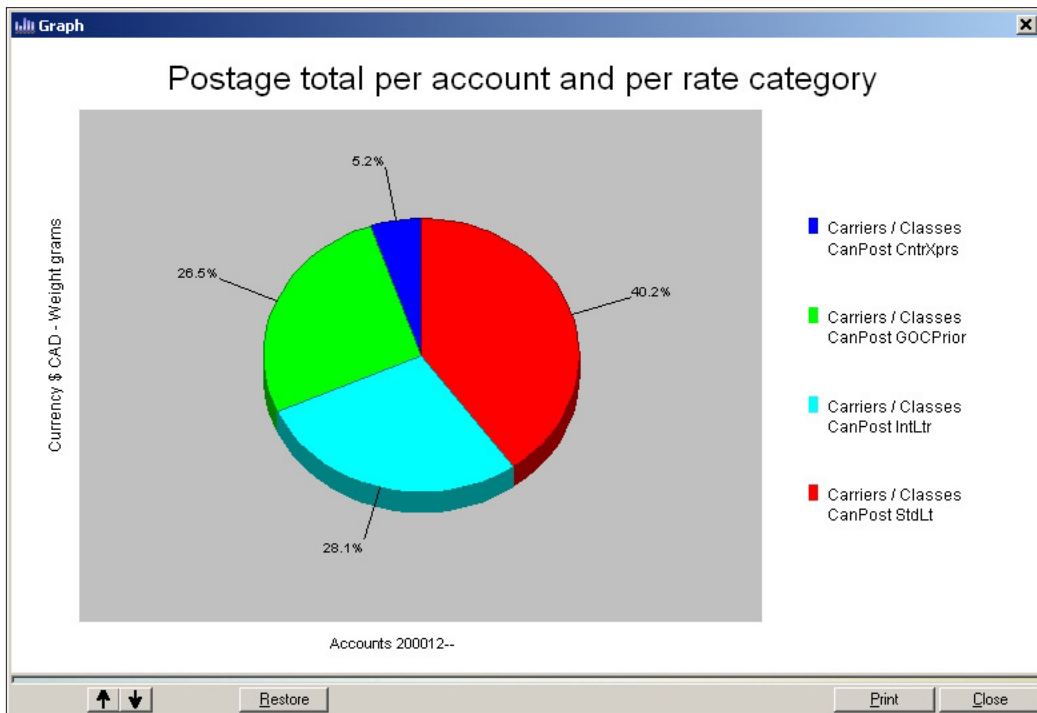
- **In a 3-D bar chart format:** click on the [▬▮] button in the "Category" row. The example here shows the amount of postage charged for the CanPost IntLtr category for all of the accounts. Use the up and down, or side to side arrows at the bottom of the bar chart screen to control the rotation and perspective of the bar chart.
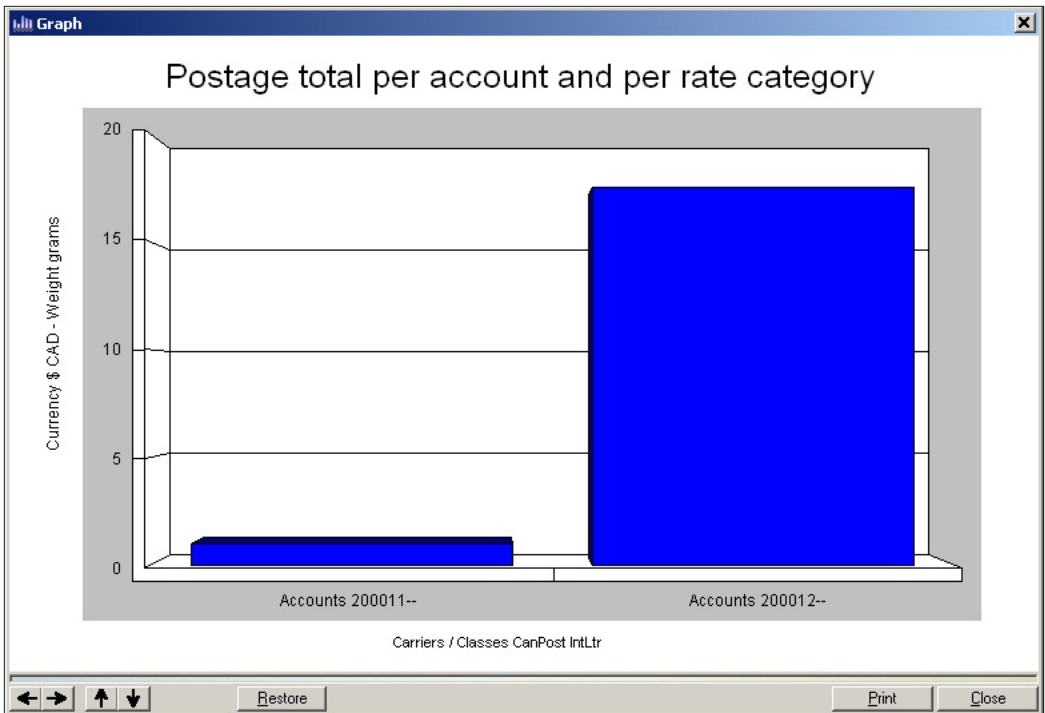
Chapter 9 - Adding Surcharges

**Types of
Surcharges**

You can apply the following surcharges using whenever you process mail:

- **Account surcharge** - when a transaction containing an account with a defined surcharge is received at the Host PC, the amount of surcharge is computed based upon the *type* surcharge selected..

- **Job surcharge** - when a transaction containing an job with a defined surcharge is received at the Host PC, the amount of surcharge is computed based upon the *type* surcharge selected

- **Global surcharge** - this applies a surcharge to all mail runs. The amount of surcharge is computed based upon the *type* surcharge selected.

- **Data Collector PC or mail processor surcharge** - this applies the surcharge at the Data Collector PC when you process mail on a meter or mailing machine connected to that Data Collector PC. The amount of surcharge is computed based upon the *type* surcharge selected This is also referred to as a workstation surcharge.

- **Class surcharge** - this applies the surcharge when you use a particular class to process mail. You can add a surcharge to the predefined usual or standard carriers, classes and fees and to the user defined carriers, classes, and fees. The amount of surcharge is computed based upon the *type* surcharge selected.

You can apply the following *types* of surcharges:

- **Flat rate** - this applies a fixed surcharge for every mail run or batch.

- **Per piece** - this applies a fixed surcharge for every piece of mail.

- **Percentage** - this applies a surcharge as a percentage of the base amount of either the batch or the transaction.

You can also combine these types of surcharges. For example, you can add a percentage and a per piece surcharge to the same account.

Adding Surcharges to Accounts

You add surcharges to accounts at the Business Manager Host PC using the Administration module. You must be a manager to perform this operation.

Whenever you add a surcharge at the account level, the surcharge is applied every time you process mail using that account.

To add surcharges:

1. Select **Parameters | Accounts and clients**. The *Clients and Accounts* screen appears.

2. Click on the **Surcharges** button and the bottom of the screen and the *Account Surcharge* screen opens.

3. Select the account(s) to which you want to apply the surcharge:

    a. To select all clients and accounts, click on the ☑ button.

    b. To select all of the accounts associated with a single client, make sure there is a check mark in the box in front of "Automatically select dependent accounts", then click on the box in front of the client name.

    c. To select a single account, click on the box in front of the account name or code.

4. Once you select the account(s), click on the drop-down arrow in the "Type of Surcharge" field and select the surcharge.
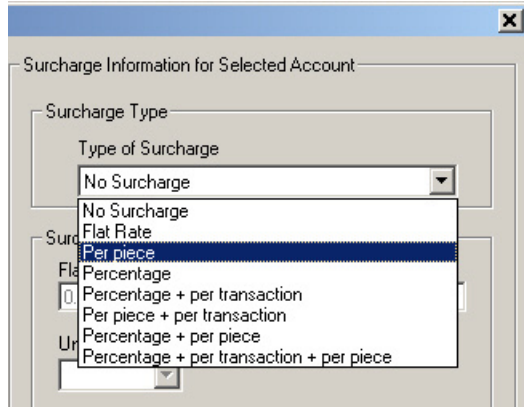
5. Once you select the type of surcharge, click in the appropriate field in the "Surcharge Value and Units" section and enter the value.
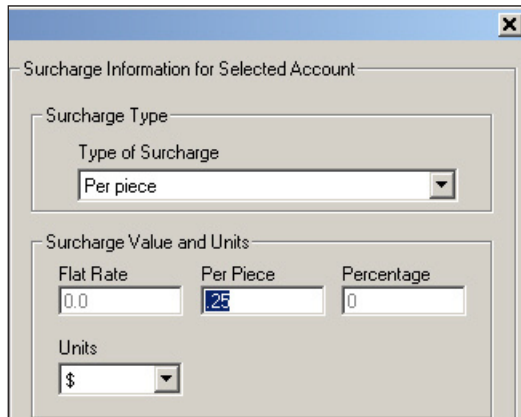
6. To show the amount of the surcharge on the invoice reports, select **Yes** from the drop-down menu in the **Charge back** field in the "Disposition" section.

7. When you are done, click on the **Apply Surcharge Choices** button, then click on the **Close** button at the bottom of the screen.

Adding Surcharges to Jobs

You add surcharges to jobs at the Business Manager Host PC using the Administration module. You must be a manager to perform this operation.

To add surcharges:

1. Select **Parameters | Jobs**. The *Jobs* screen appears.

2. Click on the **Surcharges** button and the bottom of the screen.

3. Click on and select the job to which you want to add a surcharge.

4. Click on **No Surcharge** in the "Surcharge type" column and select the type of surcharge from the drop-down menu.
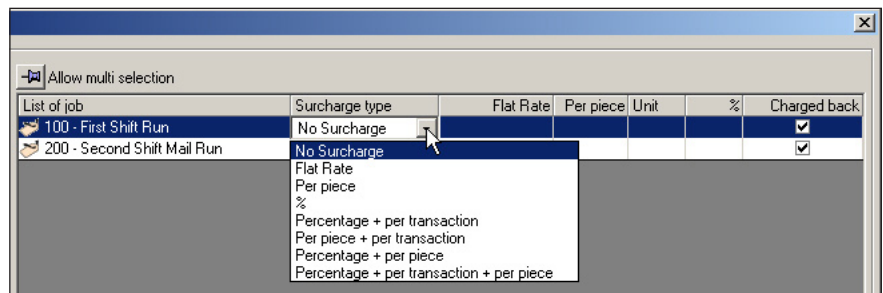
5. Once you select the type of surcharge, click in the appropriate value field for that surcharge and enter the surcharge amount or percentage.

6. To show the amount of the surcharge on the invoice reports, make sure there is a check mark in the **Charged back** check box.

7. When you are done, click on the **Confirm** button.

Adding Global Surcharges

You add global surcharges at the Business Manager Host PC using the Administration module. You must be a manager to perform this operation.

To add a global surcharge:

1. Select **Parameters | Configuration | Global surcharges**.

2. Click on **No Surcharge** in the "Surcharge type" column and select the surcharge from the drop-down menu.
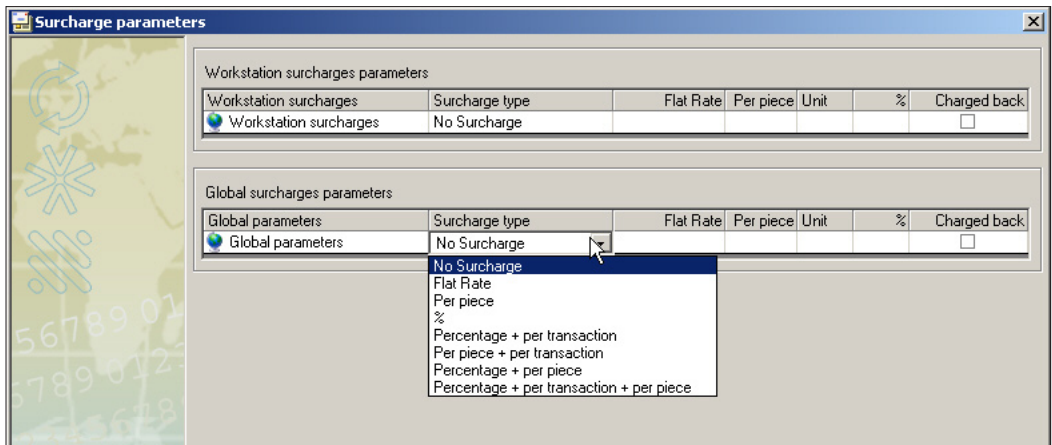
3. Once you select the type of surcharge, click in the appropriate value field for that surcharge and enter the surcharge amount or percentage.

4. To show the amount of the global surcharge on reports, make sure there is a check mark in the **Charged back** check box.

NOTE: You can also add workstation surcharges from the Host PC. Follow steps 2 through 4 above for the "Workstation surcharges parameters" section of the screen.

To add workstation surcharges at a Data Collector PC, see *Adding Surcharges at the Data Collector PC* in this chapter.

Adding Surcharges at the Data Collector PC

When you run mail at a meter or mailing machine, you can add a surcharge to the transaction at the Data Collector PC to which the meter/mailing machine is attached. This is also referred to as a workstation surcharge.

You can also add a workstation surcharge when adding manual transactions.

You can add these surcharges as an operator or manager.

1. To add a workstation surcharge you must be in the *Process mail* or *Manual input* screen.

2. Click on the **Surcharges** button at the bottom *Process mail* or *Manual input* screen. This opens the *Surcharge parameters* screen.

3. The upper portion of the *Surcharge parameters* screen shows the surcharges already added to the job, account, or class associated with this transaction. It also shows any global surcharges added. You cannot modify any of these surcharges at this screen.

4. To add a workstation surcharge to this transaction, click on **No Surcharge** in the "Surcharge type" column and select the surcharge from the drop-down menu.

5. Once you select the type of surcharge, click in the appropriate value field for that surcharge and enter the surcharge amount or percentage.

Surcharge type	Flat Rate	Per piece	Unit	%	Charged back
Per piece		.10	$		✔

6. To show the amount of the workstation surcharge on reports, make sure there is a check mark in the **Charged back** check box.

Adding Surcharges to Classes

You can add a surcharge to the predefined usual or standard carriers, classes and fees and to the user defined carriers, classes, and fees.

To assign a surcharge to a carrier class, you need to be logged in as a manager at the Business Manager Host PC and use the Administration module.

Adding Surcharges to Predefined Standard Classes, Carriers, and Fees

1. Select **Parameters | Configuration | Carriers, Classes and Fees | Predefine Usual Carriers, Classes and Fees**.

2. The *Usual Carriers, Classes and Fees* screen opens.
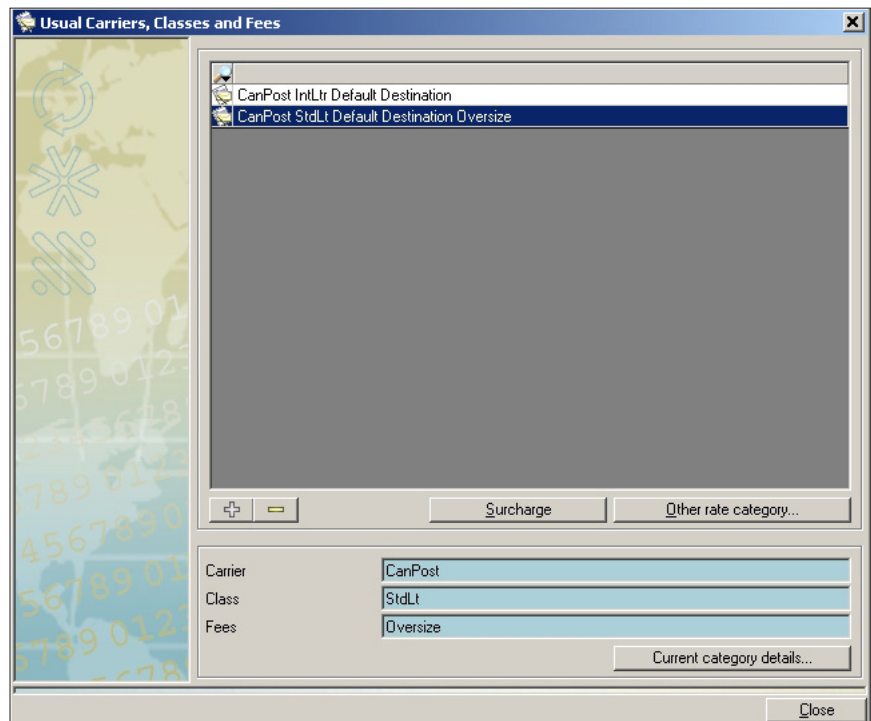
3. If there are no predefined carriers listed in this screen, or if you need to create a new one, go to step 4.

   If the carrier you need is listed here, go to step 11.

4. To create a new carrier/class, click on the **Other rate category** button. The *Postal category selection* screen open. This screen lists the available carriers.
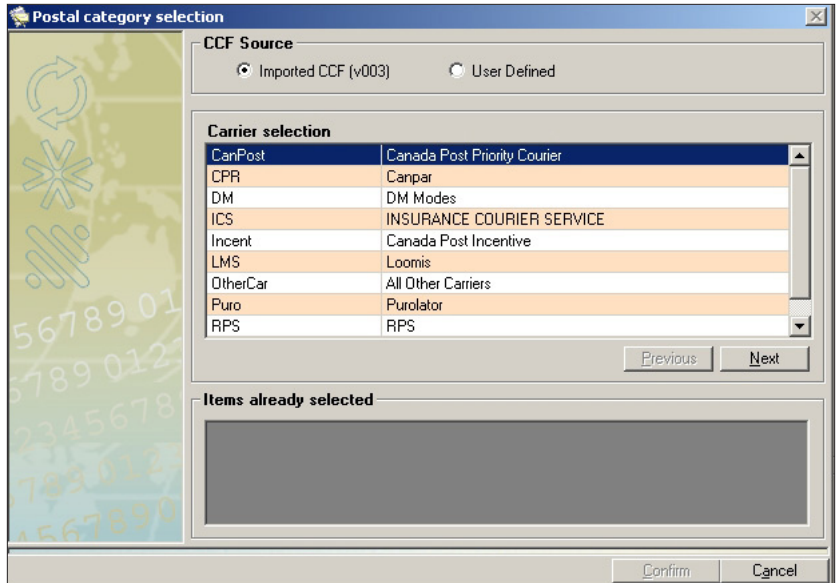
5. Click on the appropriate option button in the "CCF Source" section. Business Manager comes with the most commonly used carriers and their standard classes of service. To use these, click on the option for **Imported CCF**.

6. Select and highlight the carrier you want, for example, CPC. Click on **Next**.

7. The *Postage category selection* screen appears.
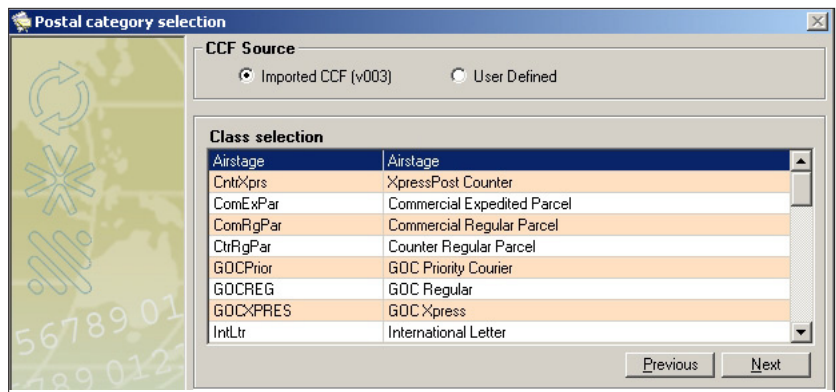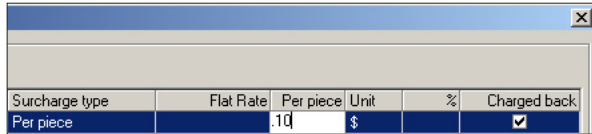
8. Select and highlight the class you want, for example, for standard mail, select **1st Auto 3/5 Digit**.

9. Click on the **Next** button and a list of available services appears. If you are done, click **Confirm**.

   a. If you want to select a service, click on the service and then click **Next**.

   b. You can continue to add services by clicking selecting the service and clicking on the **Next** button. As you add services, they are displayed in the "Items already selected" box.

10. When you are done, click the **Confirm** button. The *Usual Carriers, Classes and Fees* screen reappears.

11. Click the [+] button at the bottom of the screen to add this as a new preselected class.

12. You are prompted to enter a description of the new preselected class. You can accept the default or enter a new name. Click **Confirm**.

13. Click the **Surcharge** button and the *Surcharges* screen opens.
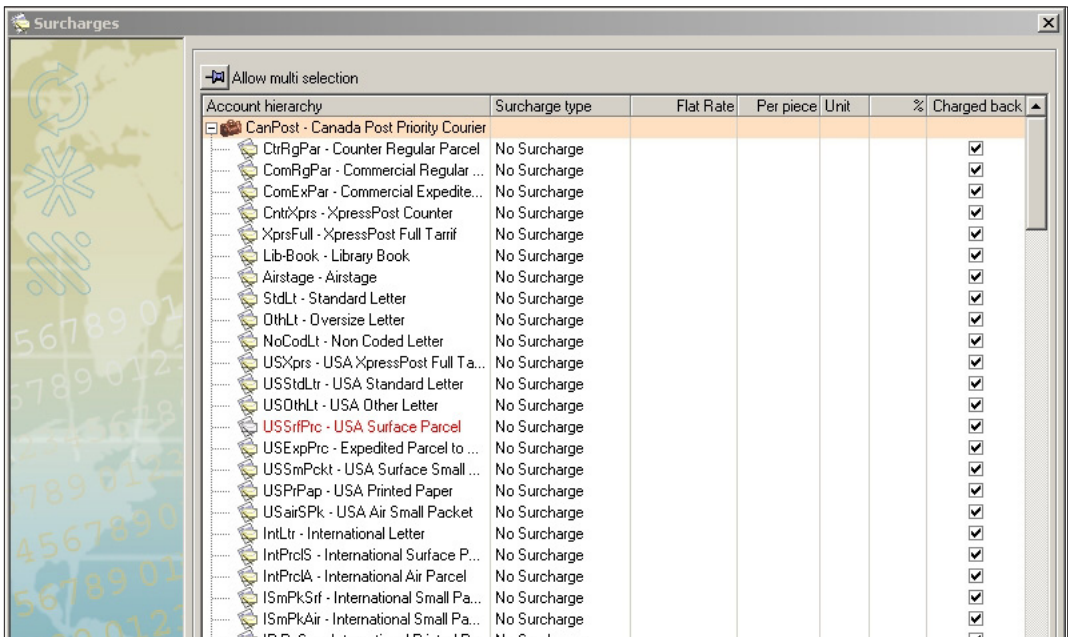
14. To add a workstation surcharge to this class, click on **No Surcharge** in the "Surcharge type" column and select the surcharge from the drop-down menu.

15. Once you select the type of surcharge, click in the appropriate value field for that surcharge and enter the surcharge amount or percentage.

Surcharge type	Flat Rate	Per piece	Unit	%	Charged back
Per piece		.10	$		☑

16. To show the amount of the class surcharge on reports, make sure there is a check mark in the **Charged back** check box.

17. Click the **Confirm** button, then **Close**.

Adding Surcharges to User Defined Carriers, Classes, and Fees

1. Select **Parameters | Configuration | Carriers, Classes and Fees | User Defined Carriers, Classes and Fees**.

2. The *Manage User Defined Carriers, Classes and Fees* screen opens.

3. Click on the Surcharge button at the bottom of the screen. The *Surcharges* screen opens.

4. Click on and highlight the user defined class to which you want to add a surcharge/

5. Click on the **No Surcharge** in the "Surcharge Type" column and select the surcharge from the drop-down menu.
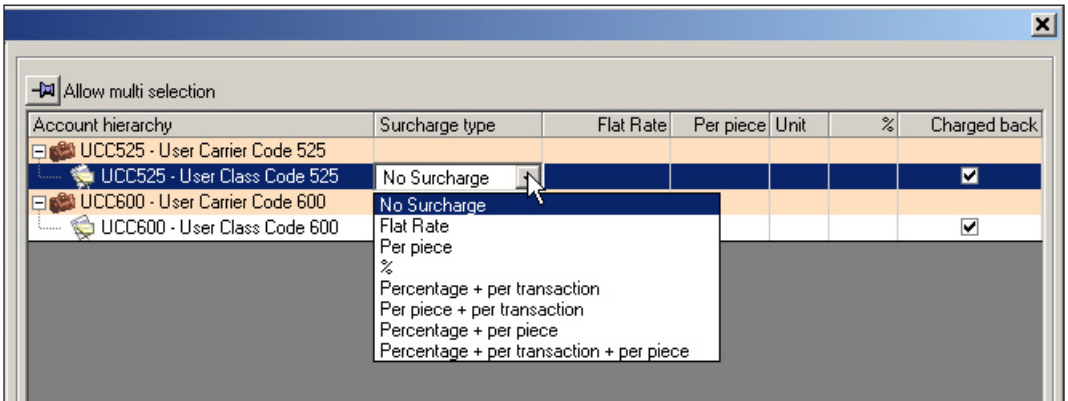
6. Once you select the type of surcharge, click in the appropriate value field for that surcharge and type in the amount or percentage.
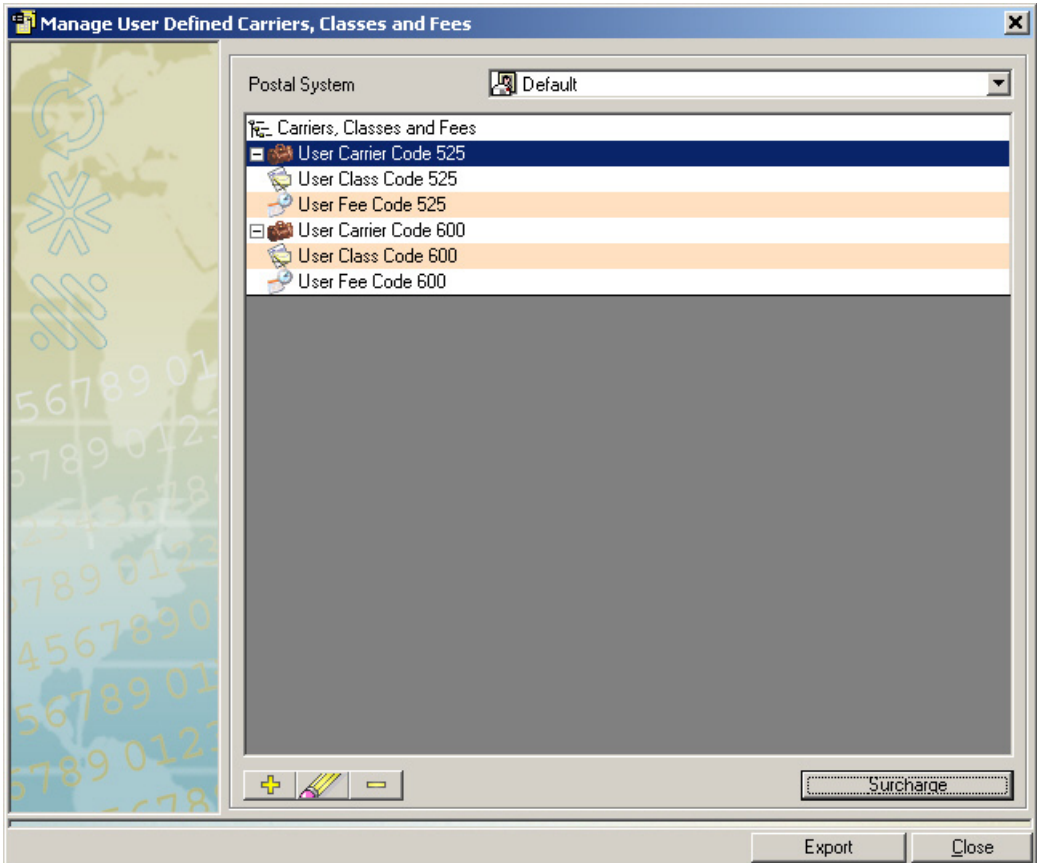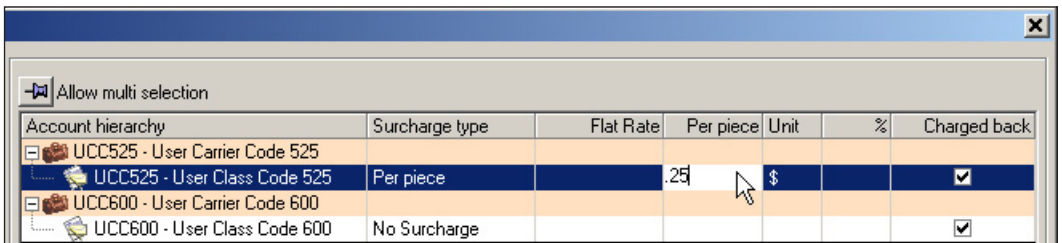

7. To show the amount of the surcharge on reports, make sure there is a check mark in the **Charged back** check box.

8. Click the **Confirm** button, then **Close**.

Chapter 10 - Working with Reports

Viewing and Printing Reports

You can view and print reports from the Business Manager Host PC. Both managers and report users can view and run reports. For a brief description of the most common types of reports, see *Types of Reports Available* in this chapter.
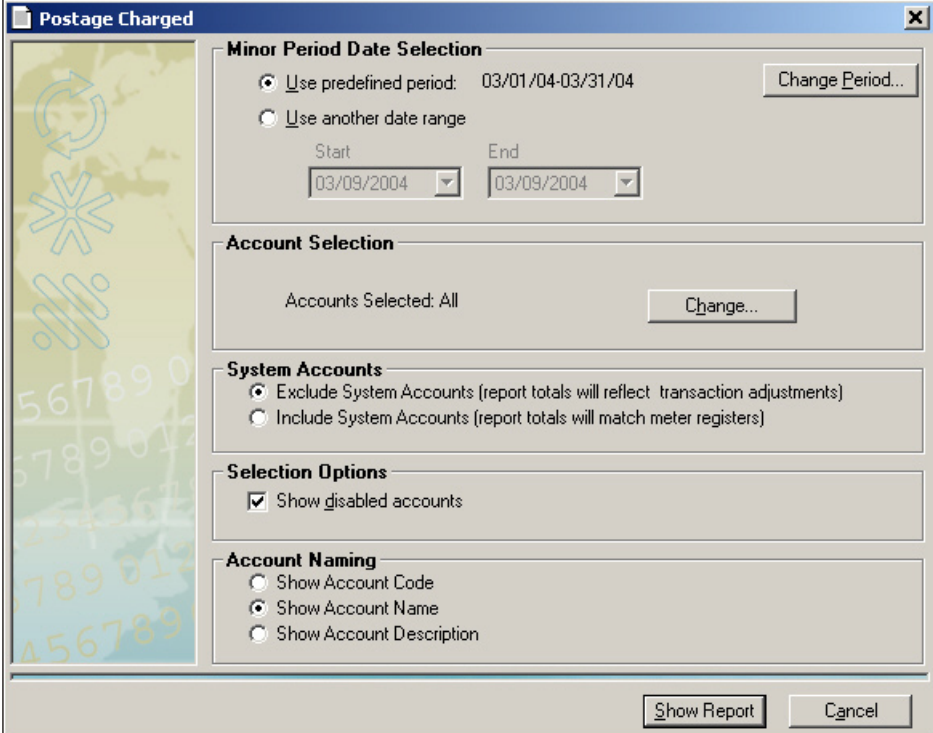
1. Select **Reports | Reports**.

2. Click in the **Database selection** field in the main *Reports* screen and choose the appropriate database.
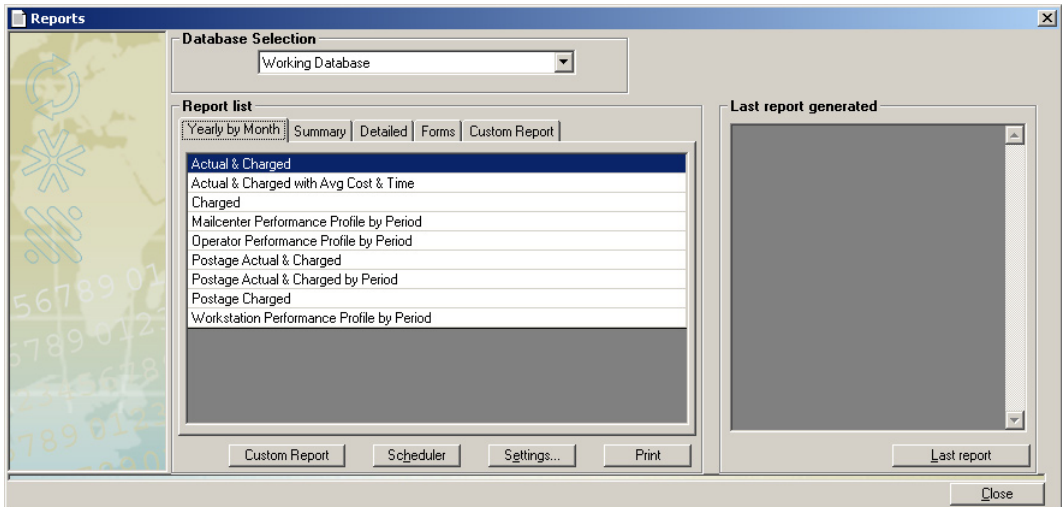
If you want to run reports on all of the databases collected at the master Host PC, select **Consolidated**. To run reports from the local Host PC, select **Working**.

3. In the "Reports list" section, click on the tab to select the type of report (Yearly by Month, Summary, etc.).

4. To run a specific report now, follow the steps here. To run one, later, go to the section *Scheduling a Report*.

5. Click on and highlight the specific report, then click in the **Settings** button at the bottom of the screen.

6. The next screen that appears depends on the type of report you selected. For example, if you select **Postage Charged**, under the "Yearly by Month" tab, then click on the **Settings** button, the *Postage Charged* screen opens.

7. To change the period, click on the **Change Period** button.

8. To change the accounts on which you are running the report, click on the **Change** button in the "Account Selection" section. The *Clients and Accounts - Select and sort* screen appears.
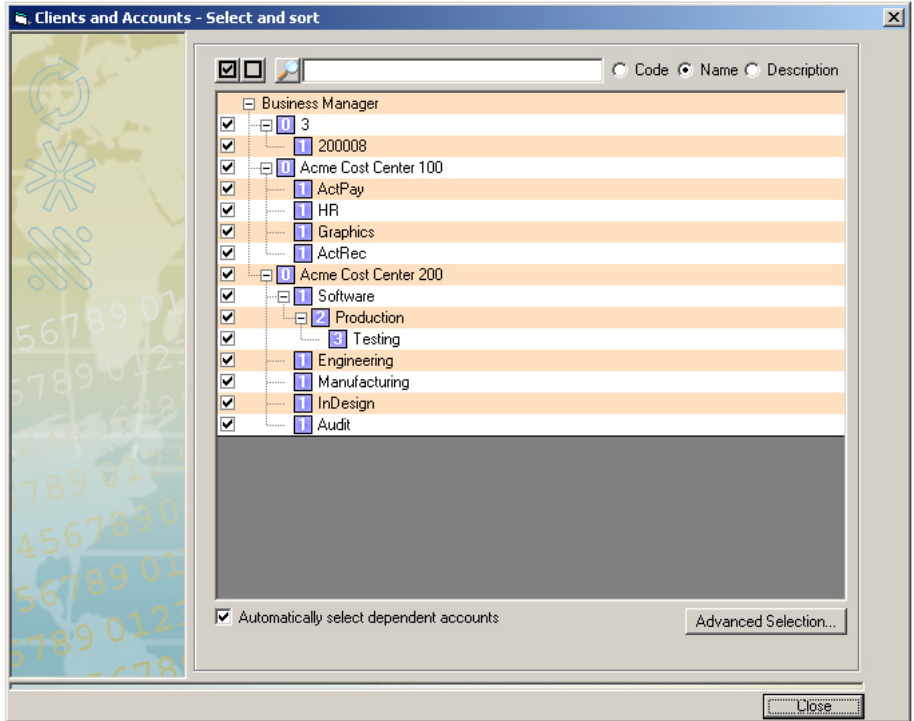
- The first time you open this screen all of the accounts are selected as indicated by the check mark in the box in front of each account name.

  The box in front of "Automatically select dependent accounts" is checked by default. This ensures that when you select a client, all of its accounts and sub accounts are selected.

- To deselect individual accounts, click in the check box in front of the each of the accounts to remove the check mark.

- To deselect all accounts, click on the ▣ button at the top of the screen.

- To select all accounts, click on the ☑ button at the top of the screen.
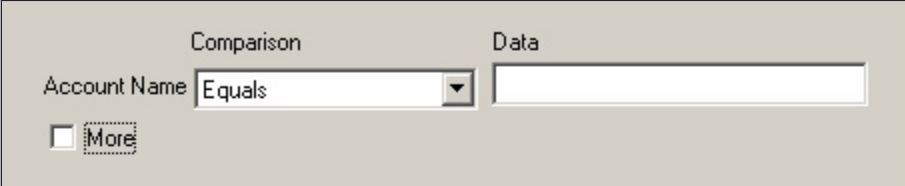
  For a description of the Advanced Selection feature, see *Advanced Account Selection* in this chapter.

9. Click the **Close** button. The *Postage Charged* screen reappears.

10. To view all of the system accounts, click on the option button in front of "Include System Accounts (report totals will match meter registers)" in the "System Accounts" section. Refer to the *System Account Reports* section in this chapter for more information.

11. To display the report on the screen, click on **Show Report**. You can then review the report, make changes, or print it.

    To schedule a report to run later, refer to the *Scheduling a Report* section in this chapter.

Advanced Account Selection

To begin, follow steps 1-8 in *Viewing and Printing Reports* in this chapter.

1. Click on the ▣ button at the top of the screen to deselect all of the accounts.

2. Click the **Advanced Selection** button. The *Advanced Search and Select* screen appears.

3. Select a search parameter from the Comparison drop-down list.

4. Type the appropriate information in the Data field.

5. Click the **More** check box to enter additional criteria. Other-wise, go to step 8.

6. Select **And** *or* **Or** from the drop-down list that appears.

7. Repeat steps 3-6 until you have finished selecting your search criteria.

NOTE: You are allowed up to five search criteria entries.

---

8   Click **Confirm**. The accounts that corresponded with your search criteria will be selected.

Return to step 9 in *Viewing and Printing Reports* in this chapter.

Scheduling a Report   1. To schedule a report to run at a later date, click on the **Scheduler** button at the bottom of the main *Reports* screen. The *Currently Scheduled Reports* screen opens.
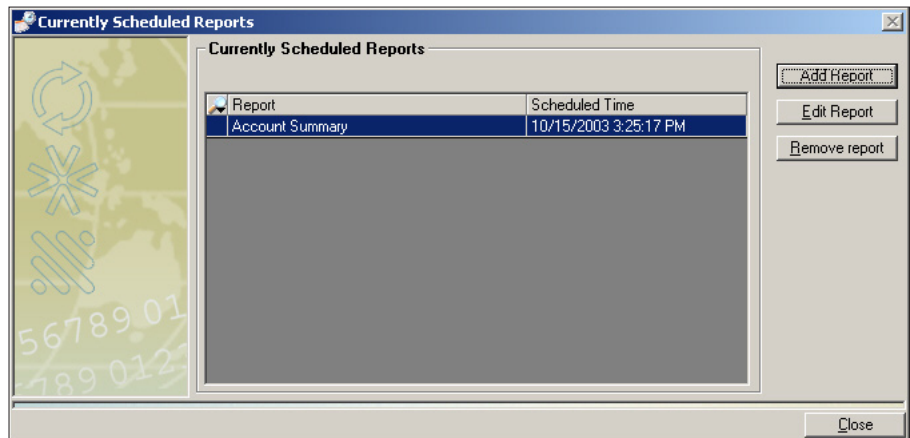
        This lists the reports already scheduled to run. You can edit or remove those reports, or add a new one.
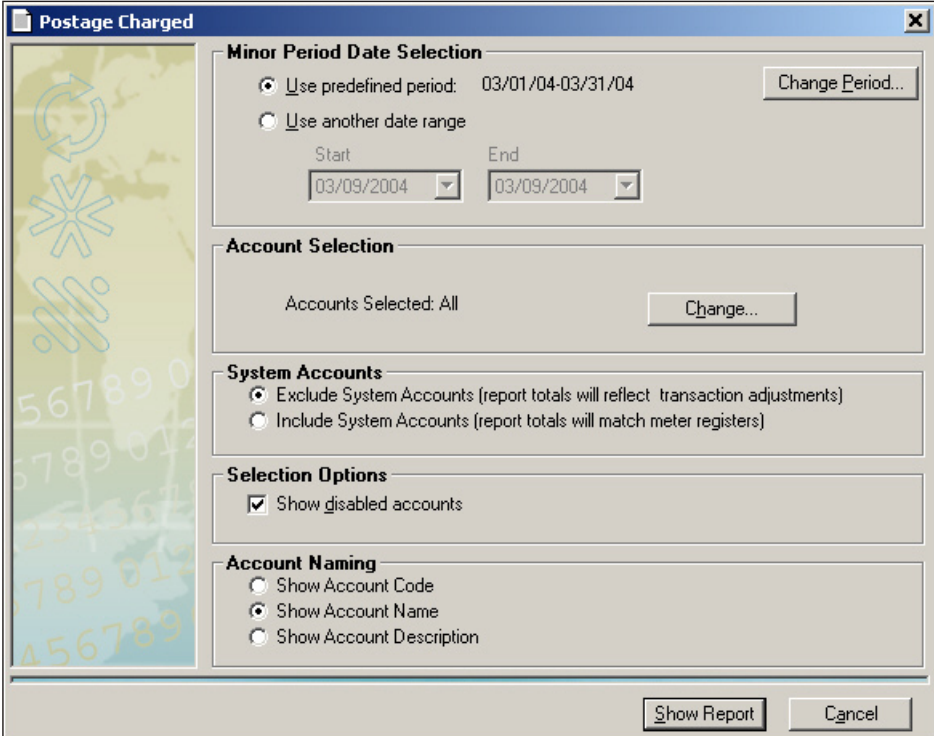
2. To add a new report, click on the **Add Report** button and the *Add a Report* screen opens.
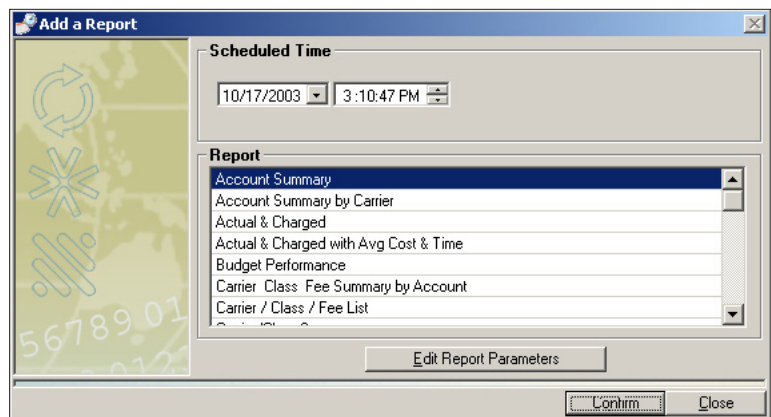
3. In the "Scheduled Time" section, select the data and time you want to run the report.

4. Select the specific report in the "Report list" section.

    If you want to make changes to the report, click on **Edit Report Parameters**.

    The screen that opens depends on the type of report. For example, if you select **Postage Charged**, then click on the **Settings** button, the *Postage Charged* screen opens.

5. To change the period, click on the **Change Period** button. If you need to modify the accounts you want to view, click on the **Change** button in the "Account Selection" section. Follow the procedure for modifying accounts as described in *Viewing and Printing Reports* in this chapter.

6. When you are done, click the **Save** button.

7. Click **Confirm**. The report now appears in the *Currently Scheduled Reports* screen.

8. Click **Close** to exit.

Types of Reports Available

You can view all of the report types available by clicking on each of the four tabs in the main *Reports* screen.

To get to the main *Reports* screen, select **Reports | Reports**.

The following sections list the main types of reports and provides brief descriptions of the main types.

To create reports for the special system accounts, refer to the *System Account Reports* section in this chapter.

Yearly by Month Reports

Refer to the table following the Yearly by Month screen for a brief description of the Yearly reports.
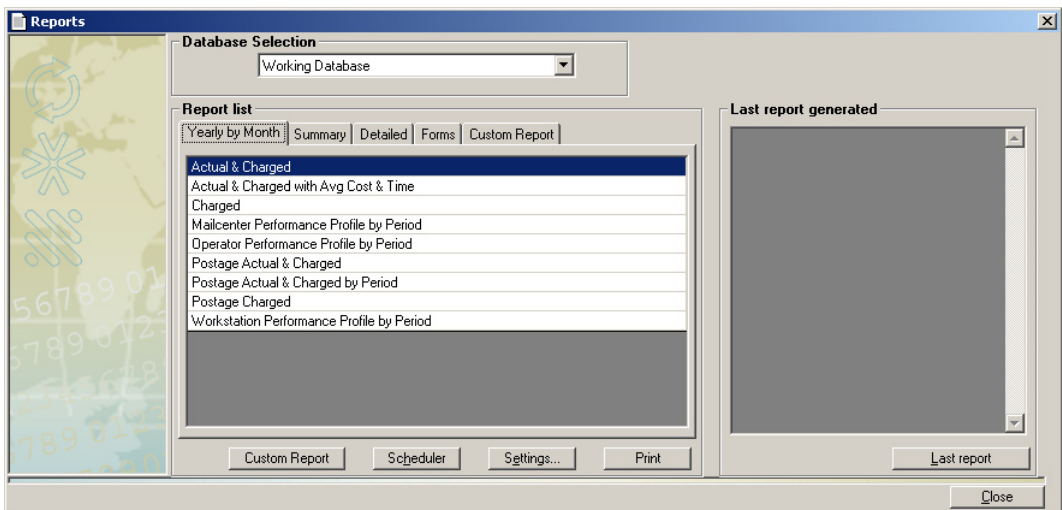
Description of Yearly by Month Reports	
Actual & Charged	For all accounts selected, this shows the carrier, class, number of pieces, total cost, and total charged.
Actual & Charged with Avg Cost & Time	For all accounts selected, this shows all charges to those accounts grouped by account, carrier, class, number of pieces, total amount charged, average cost/piece, and the total time.
Charged	For all accounts selected, this shows all charges to those accounts grouped by carrier, class, number of pieces, and total amount charged.
Mailcenter Performance Profile by Period	This shows a comparison of mailroom actual versus expected performance by subperiod and includes: the period, meter, meter pieces, total cost, total charged, average cost/piece, average pieces/hour, standard machine pieces per hour, and a performance vs. standard index.
Operator Performance Profile by Period	This shows a comparison of operator actual versus expected performance broken down by subperiod and includes: operator, period, meter hours, meter pieces, average pieces/hour, standard machine pieces/hour, and a performance vs. standard index.
Postage Actual & Charged	For all accounts selected, this shows all charges to those accounts and includes: the account, pieces, total cost, and total charged.
Postage Actual & Charged by Period	For all accounts selected, this shows all charges to those accounts and includes: the account, pieces, total cost, and total charged for both the date range you select, and up through the current date from the beginning of the major accounting period.
Postage Charged	For all accounts selected, this shows the account, pieces, and total charged
Workstation Performance Profile by Period	This shows a comparison of workstation actual versus expected performance broken down by subperiod and includes: workstation, machine type, period, meter hours, average pieces/hour, meter pieces, standard machine pieces/hour, and a performance vs. standard index.

Summary Reports

Refer to the table following the *Summary* screen for a brief description of the Summary reports.
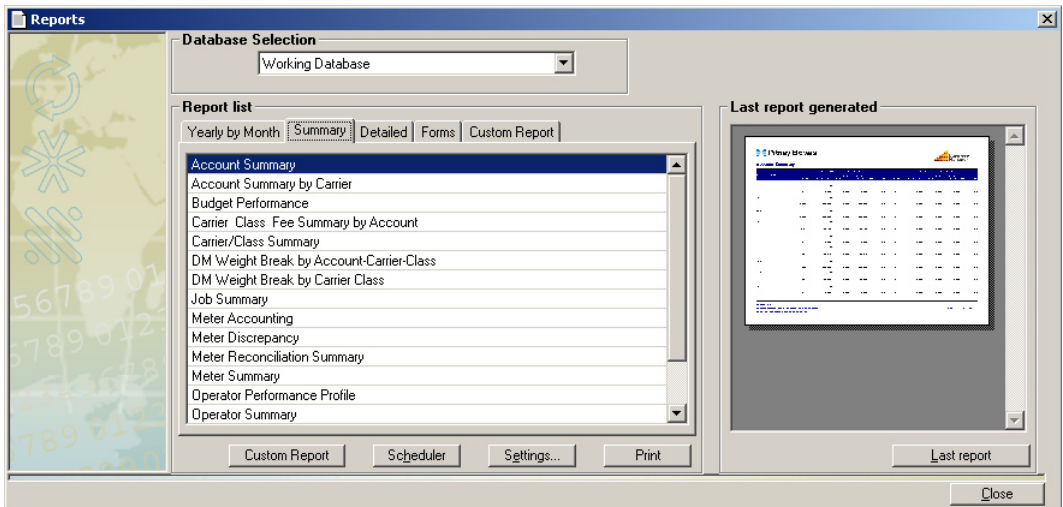
Scroll down to see the other reports.

Description of Summary Reports	
Account Summary	For all accounts selected, this summarizes all costs for each account and includes: the account, pieces, the total cost, surcharge amount, total charged, and the weight for both the date range you select, and up through the current date from the beginning of the major accounting period.
Account Summary by Carrier	For all accounts selected, this summarizes all costs for each account and includes: the carrier, the account, pieces, the total cost, surcharge amount, and the total charged, for both the date range you select, and up through the current date from the beginning of the major accounting period.
Budget Performance	For all accounts selected, this provides a summary of all costs accounted summarized by account compared to the budget for that account. It includes: the account name, budget, total charged, variance and percent of budget spent for both the date range you select, and up through the current date from the beginning of the major accounting period.
Carrier Class Fee Summary by Account	For all accounts selected, this includes: the account name, the carrier and class, pieces, total cost, surcharge amount, and total charged for both the date range you select, and up through the current date from the beginning of the major accounting period.
Carrier Class Summary	For all accounts selected, this includes: the carrier, the class, pieces, total cost, surcharge amount, and total charged for both the date range you select, and up through the current date from the beginning of the major accounting period.
Weight Break by Account-Carrier-Class (DM Series™ Digital Mailing Systems Using W-O-W™ Mode Only)	For all accounts selected, this includes: the account, the carrier, the class, the weight, the pieces and the total cost for both the date range you select, and up through the current date from the beginning of the major accounting period. It also includes subtotals for each class and carrier.
Weight Break by Carrier Class (DM Series™ Digital Mailing Systems Using W-O-W™ Mode Only)	For all accounts selected, this includes: the carrier, the class, the weight, the pieces and the total cost for both the date range you select, and up through the current date from the beginning of the major accounting period. It also includes subtotals for each account, class, and carrier.

Description of Summary Reports (continued)	
Job Summary	This provides an overview of all costs accounted summarized by job and includes: the job name, pieces, total cost, surcharge amount, and total charged for both the date range you select, and up through the current date from the beginning of the major accounting period.
Meter Accounting	This provides an overview of all costs charged on a particular meter, including adjustments (edits). The report includes: the meter serial number, workstation, amount adjustments (original amount, additions amount, subtractions amount, net amount), and pieces adjustments (original pieces, additions pieces, subtractions pieces, net pieces).
Meter Discrepancy	This lists all meter discrepancies detected by the system. It includes: the meter, date, time, pieces, Ascending Register amount (old reading, new reading, discrepancy). You can also modify the report to sort by account, operator, or workstation.
Meter Reconciliation Summary	This provides a comparison of the amount of funds debited from a meter and all costs charged to that meter. The amounts should be identical. It includes: the meter serial number, Ascending Register (start, end), pieces (start, end), meter data (pieces, cost), and accounting data (pieces, cost).
Meter Summary	This provides a summary of all the costs charged to the meters. It includes: the meter serial number, pieces, total cost, surcharge amount, total charged, and cost/piece for both the date range you select, and up through the current date from the beginning of the major accounting period.
Operator Performance Profile	This shows a comparison of operator actual versus expected performance broken down by workstation and includes: operator, workstation, machine or system type (e.g., DM500™), meter hours, meter pieces, average pieces/hour, standard machine pieces/hour, and a performance vs. standard index.
Operator Summary	This provides a summary of all the costs generated for the operators. It includes: the operator name, pieces, total cost, surcharge amount, total charged for both the date range you select, and up through the current date from the beginning of the major accounting period.

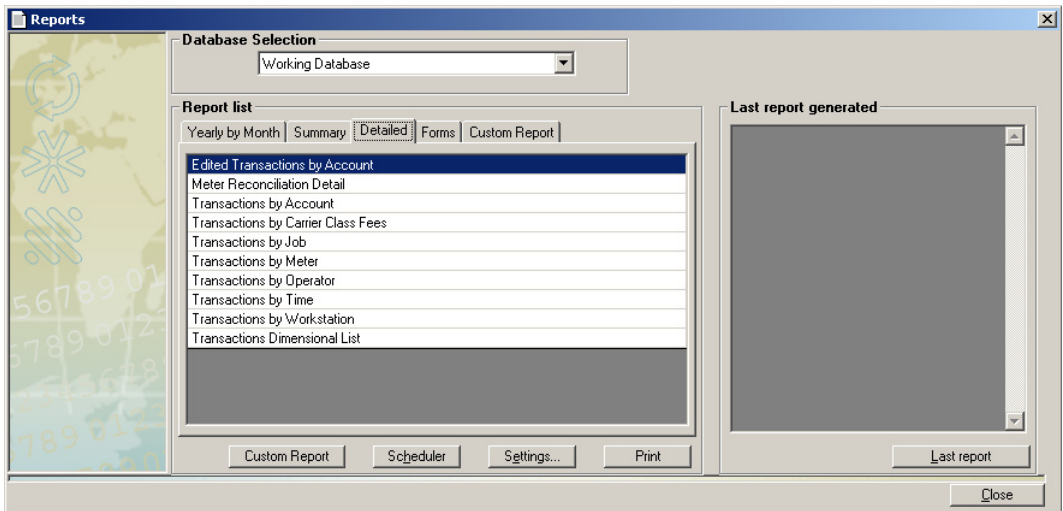| Description of Summary Reports (continued)	
Workstation Performance Profile	This shows a comparison of workstation actual versus expected performance broken down by workstation and includes: workstation name, machine or system type (e.g., DM500™), meter hours, meter pieces, average pieces/hour, standard machine pieces/hour, and a performance vs. standard index.
Workstation Setup	This report lists all workstations that defined for Business Manager along with their properties. It includes: workstation ID, workstation name, workstation type, base model, standard throughput, and workstation status (enabled or disabled).
Workstation Summary	This provides a summary of all the costs charged to the workstations. It includes: workstation name, pieces, total cost, surcharge amount, and total charged, for both the date range you select, and up through the current date from the beginning of the major accounting period.

Detailed Reports

The detailed reports provide you with information about transactions and groups them by accounts, operators, meters, workstations, jobs and carriers and classes.

Refer to the table following the *Details* report screen for a brief description of the Detail transaction reports.

| Description of Detailed Reports	
Edited Transactions by Account	For all accounts selected, this summarizes all costs for each account that has been edited (for example, when the number of pieces for a transaction assigned to an account are changed). This report includes: the date, workstation name, operator name, carrier, class, time (start, end, and total), pieces, total cost, surcharge amount, and total charged.
Meter Reconciliation Detail	This provides a detailed comparison of the amount of funds debited from a meter and all costs charged to that meter. It includes: the meter serial number, Ascending Register (start, end), pieces (start, end), meter data (pieces, cost), and accounting data (pieces, total cost).
Transactions by Account	This lists all of the transactions grouped by account and by operator. It includes: the date, the account, workstation, operator, carrier, class of service, time (start, end, and total time), pieces, total cost, surcharge amount, and total charges.
Transactions by Carrier Class Fees	This lists all of the transactions grouped by carriers. It includes: the carrier, class and fee, workstation, operator, date, time (start, end, and total time), pieces, total cost, surcharge amount, and total charges.
Transactions by Job	This lists all of the transactions grouped by jobs. It includes: the date, job, workstation, operator, carrier, class, time (start, end, and total time), pieces, total cost, surcharge amount, and total charges.
Transactions by Meter	This lists all of the transactions grouped by meters. It includes: the date, meter, operator, carrier, class, time (start, end, and total time), pieces, total cost, surcharge amount, and total charges.
Transactions by Operator	This lists all of the transactions grouped by operator. It includes: the operator, job, date, workstation, carrier, class, time (start, end, total), pieces, total cost, surcharge amount, and total charges.

Description of Detailed Reports (continued)	
Transactions by Time	This lists all of the transactions in chronological order, beginning with accounts. It includes: the account, operator, carrier, class/fee, date, time (start, end, total), pieces, total cost, and total charges.
Transactions by Workstation	This lists all of the transactions grouped by workstation. It includes: the workstation, date, operator, carrier, class, time (start, end, total), pieces, total cost, surcharge amount, and total charges.
Transactions by Dimensional List	You can use this report for those systems that can switch class within a series of transactions. For example, if your system has W-O-W™ (weigh on the way) and the class changes due to a change in weight that requires a different class. This report lists all of the classes for each transaction. The report includes: the transaction ID, account, carrier, class/fee, date, time (start, end, total), pieces, total cost, surcharge amount, and total charges.

Form Reports

The forms reports provide you with system information about your meters, accounts, operators and system settings.

Refer to the table following the *Forms* report screen for a brief description of the Forms reports.
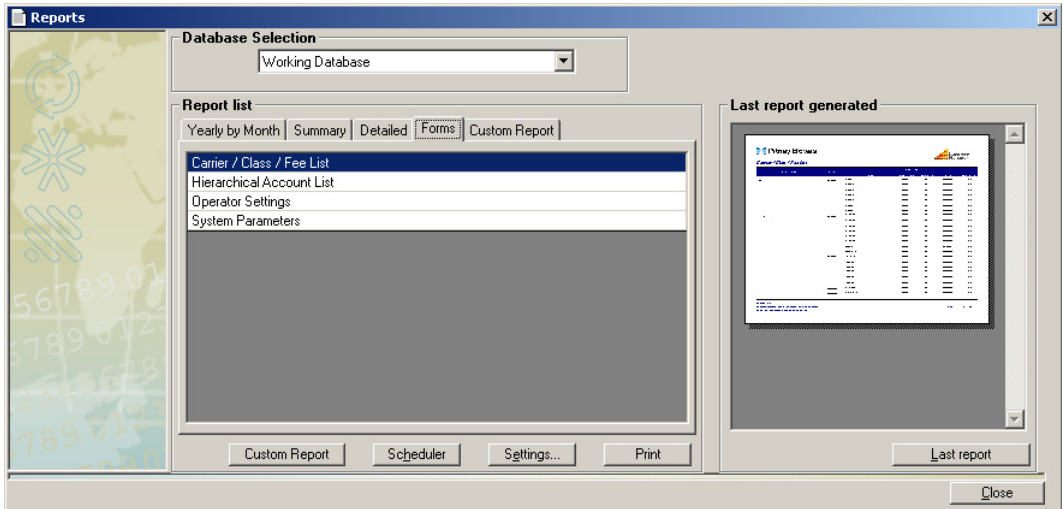
Description of Forms Reports	
Carrier/Class/Fee List	This report lists all carriers, classes, and fees defined in the system along with their properties. It includes: carrier name, status, class/fee (name, class, fee, meterable, status, user defined).
Hierarchical Account List	This report lists all accounts defined in the system along with some of their properties. It includes: account name, account description, budget assigned (yes/no), and password required (yes/no).
Operator Settings	This report lists all users defined in the system along with their properties. It includes: operator login, operator name, access level, and status.
System Parameters	This includes a list of all the system variables and their current values.

System Account Reports

You can view the special system accounts that Business Manager creates when you void or modify transactions.

This allows you to view all charges made against your meter register including those charges that were voided or modified as well as those charged to specific accounts. If you void a transaction, the charges for each mail piece are still subtracted from your meter register even though they will not appear as charges against the account.

To view the system accounts, follow the procedure here.

1. Select **Reports | Reports**.

2. Click in the **Database selection** field in the main *Reports* screen and choose the appropriate database.

3. In the "Reports list" section, click on the tab to select the type of report (Yearly by Month, Summary, etc.).

4. Click on and highlight the specific report, then click in the **Settings** button at the bottom of the screen.

5. The next screen that appears depends on the type of report you selected. For example, if you select **Postage Charged**, under the "Yearly by Month" tab, then click on the **Settings** button, the *Postage Charged* screen opens.

6. To change the period, click on the **Change Period** button.

7. If you need to modify the accounts you want to view, click on the **Change** button in the "Account Selection" section. Follow the procedure for modifying accounts as described in *Viewing and Printing Reports* in this chapter.

8. Click on the option button in front of "Include System Accounts (report totals will match meter registers)" in the "System Accounts" section.

9. To display the report on the screen, click on **Show Report**. You can then review the report, make changes, or print it.

10. To run a report later, click on the **Scheduler** button at the bottom of the main *Reports* screen and follow the procedure for scheduling reports as described in *Scheduling a Report* in this chapter.

11. All voided and/or modified transactions are listed under the system account name, 00007.

Matching AccuTrac™ HT Mail Accounting System Reports to Business Manager Reports

If you have imported your AccuTrac™ HT mail accounting system accounts into Business Manager and want to print reports similar to those you printed on AccuTrac™ HT system refer to the table here to see the Business Manager reports that are similar to your old AccuTrac™ HT system reports.

This table lists all of the AccuTrac™ HT system reports grouped by tab and the corresponding Business Manager reports and their type.

AccuTrac™ HT Mail Accounting System Report	Business Manager Report	Business Manager Report Type
System/Setup Reports:		
Account Setup Report	Hierarchical Account List	Forms
Carrier List - AccuTrac™ HT Defined	Carrier Class Fee List	Forms
Carrier List - User Defined		
Carrier/Class/List - AccuTrac™ HT Defined		
Carrier/Class/List - User Defined		
Carrier Special Fee List - AccuTrac™ HT Defined		
Carrier Special Fee List - User Defined		
Host Parameters	System Parameters	Forms
Machine Setup Report	Workstation Setup	Summary
MDS Global Parameters	NA	NA
Operator Setup	Operator Settings	Forms
Sub Account Setup	Hierarchical Account List	Forms

AccuTrac™ HT Mail Accounting System Report	Business Manager Report	Business Manager Report Type
Mailroom:		
Mailroom Machine Accounting	Meter Accounting	Summary
Mailroom Class Charge Profile	NA	NA
Mailroom Class Charge Profile by Period	Carrier Class Summary	Summary
Mailroom Performance Profile by Period	Mailcenter Performance by Period	Yearly
Meter Discrepancy Report	Meter Discrepancy	Summary
Meter Status Report	Meter Reconciliation Summary	Summary
Unverified Transaction Report	NA	NA

AccuTrac™ HT Mail Accounting System Report	Business Manager Report	Business Manager Report Type
Machines:		
Machine Performance Profile by Period with Machine Totals	Workstation Performance Profile by Period	Yearly
Machine Performance Profile with Machine Totals	Workstation Performance Profile	Summary
Terminal Transaction Report	Transactions by Workstation	Detailed

AccuTrac™ HT Mail Accounting System Report	Business Manager Report	Business Manager Report Type
Invoices:		
Account Class Charge Profile Invoice	Actual & Charged with Average Cost and Time	Yearly
Account Class Total Charge Profile Invoices	Charged	Yearly
Postage Expense Chargeback Invoice	Postage Actual & Charged	Yearly
Total Postage Expense Chargeback Invoice	Postage Charged	Yearly

AccuTrac™ HT Mail Accounting System Report	Business Manager Report	Business Manager Report Type
Operators:		
Operator Performance Profile by Period with Operator Total	Operator Performance Profile by Period	Yearly
Operator Performance Profile with Operator Total	Operator Performance Profile	Summary
Operator Transaction Report	Transactions by Operator	Detailed

AccuTrac™ HT Mail Accounting System Report	Business Manager Report	Business Manager Report Type
Jobs:		
Job ID Account Transaction Report	Transactions by Job	Detailed
Job ID Transaction Report		
Transaction Report		

AccuTrac™ HT Mail Accounting System Report	Business Manager Report	Business Manager Report Type
Accounts:		
Account Class Charge Profile	NA	
Account Class Charge Profile by Period	Carrier Class Fee Summary by Account	Summary
Account Transaction Report	Transactions by Account	Detailed
Edited Account Transaction Report by Transaction Code	Edited Transactions by Account	Detailed
Performance vs. Budget Analysis Report	Budget Performance	Summary
Postage Expense Chargeback Report	Postage Actual & Charged	Yearly
Postage Expense Chargeback Report by Period	Postage Actual & Charged by Period	Yearly
Total Postage Expense Chargeback Report	Postage Charged	Yearly

Chapter 11 - Custom Reports

About Custom Reports

You can design your own report formats using the Business Manager custom reports tool. This tool allows you to select the type of report you want to create (detail, summary, system administration) as well as select the fields of information you want to appear in the report.

Before you begin creating a custom report, it's a good idea to sit down and sketch out your report design on a piece of paper. Creating this "draft" gives you the opportunity to:

- Create a list of fields that you want to appear in the report and ensure you have included all of the fields you will need.
- Decide what order you want the fields to appear on the page.
- Decide if you want any groupings in your report.
- Decide what, if any, totals you want to print in your report.

Refer to *Chapter 10, Working with Reports* for information on viewing, printing, or scheduling custom reports.

Refer to *Importing and Exporting Custom Report Templates* in *Chapter 12* for information on importing and exporting custom report templates.

Creating a Custom Report

Custom reports are accessible from the *Reports* screen. It is important to follow the steps listed in the sections below in the order they appear in this guide.

- Selecting the Database.
- Selecting the Report Type.
- Selecting the Fields.
- Selecting Filters.
- Selecting the Date Range.
- Selecting Report Options.
- Advanced Filtering Options.
- Selecting Grouping and Sort Order.
- Formatting the Report.
- Naming, Printing and Saving the Report.

Selecting the Database

The first step in creating a custom report is to select the database.

1. Select **Reports | Reports**.

2. Click in the **Database selection** field in the main *Reports* screen and select **Working**.

> **NOTE:** Custom Reports only work with the Working database.
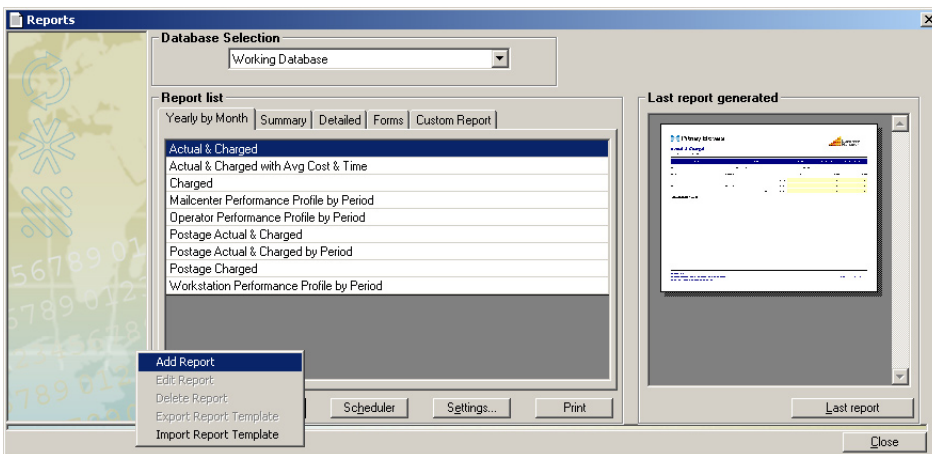
3. Click the **Custom Report** button and select **Add Report**. The *Select Report Type* screen opens.

Selecting the Report Type

Business Manager allows you to choose from one of three report types: Detail, Summary, and System administration report.

1. Select the report type by clicking the appropriate radio button.
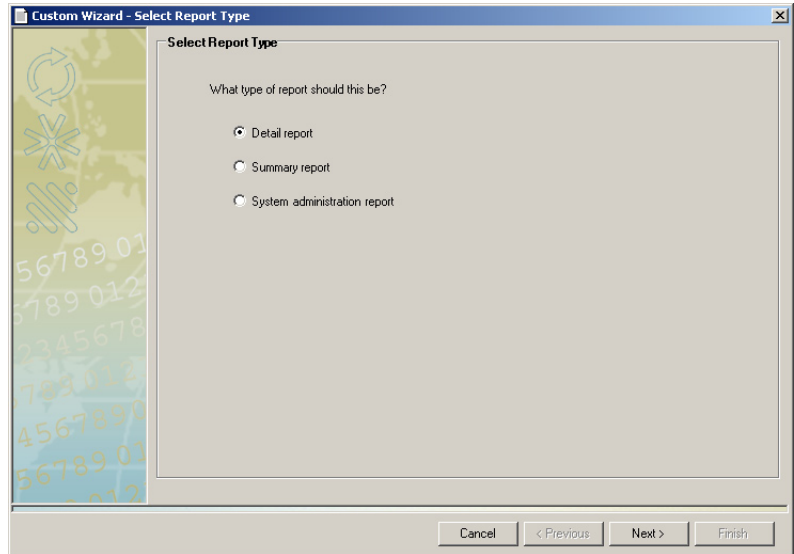
If you select **System administration report**, a drop-down list appears. Choose the appropriate report type from the list.
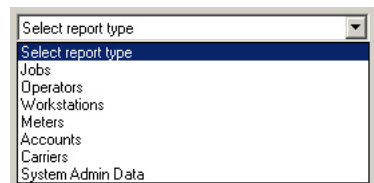
2. Click **Next >** to continue. The *Select Field* screen opens.

Selecting the Fields

The Select Fields screen allows you to select data fields you want to include in your custom report.

FIELD SELECTION NOTES:
- The list of available fields will vary, depending upon the report type you select.
- Click the **Common Fields** radio button to select from a list of the most commonly used available fields.
- Click the **All Fields** radio button to select from the entire list of available fields.

1. Select the fields by clicking on each appropriate field name. (A check mark will appear next to the field name once it has been selected.)
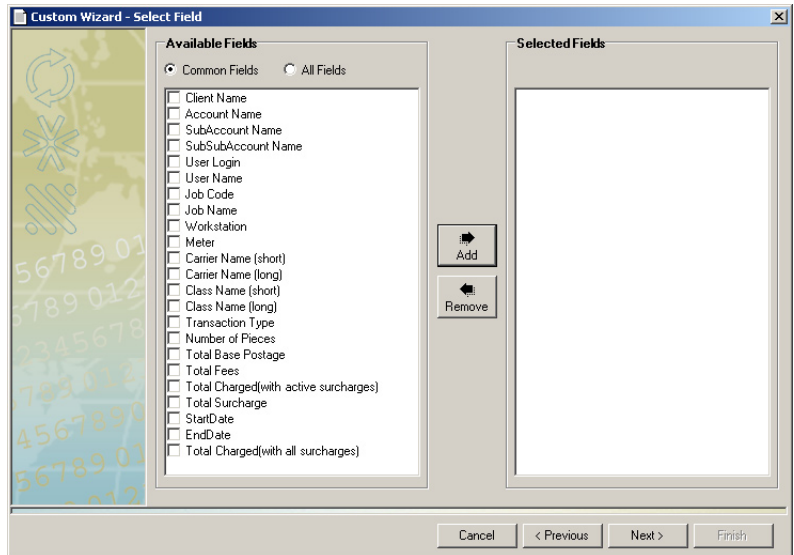
2. Click the **Add** button. The fields you selected will be moved from the Available Fields list to the Selected Fields list.

3. To remove a field from the Selected Fields list, click on the field name and click the **Remove** button. The field you selected will reappear in the Available Fields list.

4. Click **Next >** once you have finished making your field selections. The *Select the fields to filter* screen opens.

Selecting Filters

A filter is a set of rules used to select a group of records from your database to be displayed or printed on a report.

There are many examples of why you might want to use a filter. For example, you might want to create a report showing all transactions that were entered during a specific date range (e.g., between April 1 and April 15) that does not exactly match a standard week, month or other period. Or you might want to create a report that shows you all the transactions that were entered for a group of Accounts during the current month.

Business Manager allows you to select account, operator, job, workstation, meter, carrier, and/or numeric filters.

FILTER SELECTION NOTES:
- You do not need to select a filter in order to create a custom report. Simply click the **Next >** button and continue on to the next section in this guide.
- The list of available filters will vary, depending upon the report type and fields you select.

1. Select the field(s) to filter by clicking on the appropriate check box(es).
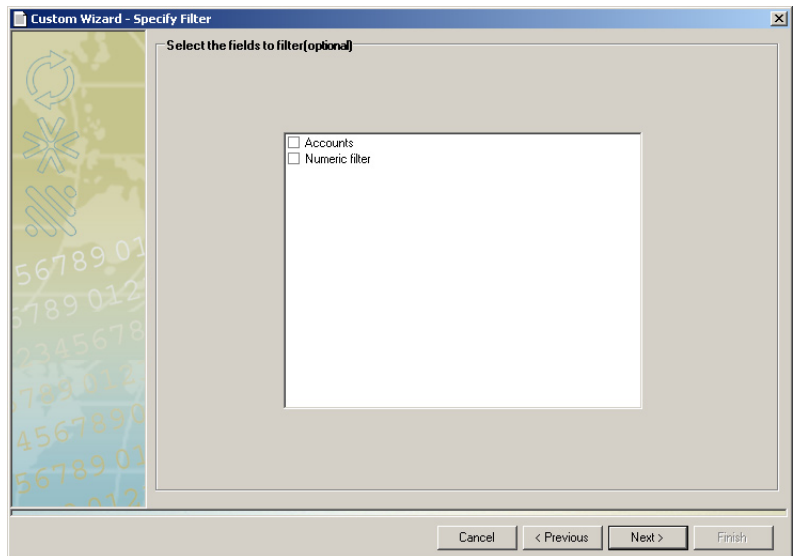
2. Once you finished making your filter selections, click **Next >**. The *Select a Date Range* screen opens.

Selecting the Date Range

There are three methods you can use to select a date range: *Use a predefined period*, *Select Relative Date*, and *Use another Date Range*. Refer to the appropriate section for specific date range selection information.
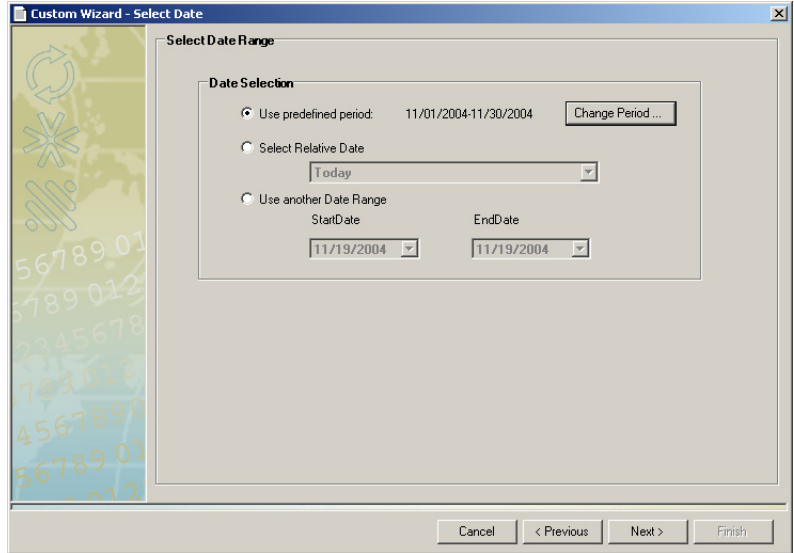
Use a predefined period
This option allows you to select from a list of date ranges based upon the accounting periods you have set up on your system.

1. Click the **Use predefined period** radio button.

2. Click the **Change Period** button. The *Period Selection* dialog box appears.

3. Select the appropriate date range from the drop-down list.

4. Click **Close**.

5. Once you have made your date range selection, click **Next >**. The *Select Options for Report* screen opens.
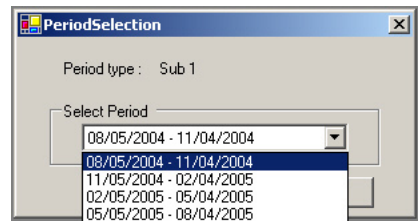
Select Relative Date

This option allows you to select a date based on its relation-ship to the current date. For example, you can select *today*, *this week*, *this month*, etc.

1. Click the **Select Relative Date** radio button.

2. Select the appropriate option from the drop-down list.

3. Once you have made your date range selection, click **Next >**. The *Select Options for Report* screen opens.
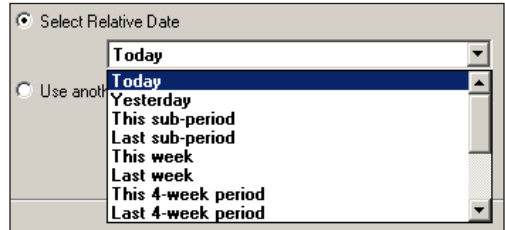
Use another Date Range

This option allows you to select a unique date range, one that is not predefined by the system, or relative to the current date.

1. Click the **Use another Date Range** radio button. The Start Date and End Date drop-down lists appear.

2. Select the appropriate date from the **Start Date** drop-down calendar. You can use the left and right arrow but-tons to scroll from month to month.

3. Click on the **End Date** drop-down list and select the ap-propriate date. Use the left and right arrow buttons to scroll through the calendar.

4. Once you have made your date range selection, click **Next >**. The *Select Options for Report* screen opens.

Selecting Report Options

The *Select Options* screen allows you to choose which transactions and/or accounts are displayed in your report.

> **NOTE:** The list of available options will vary, depending upon the report type you select.
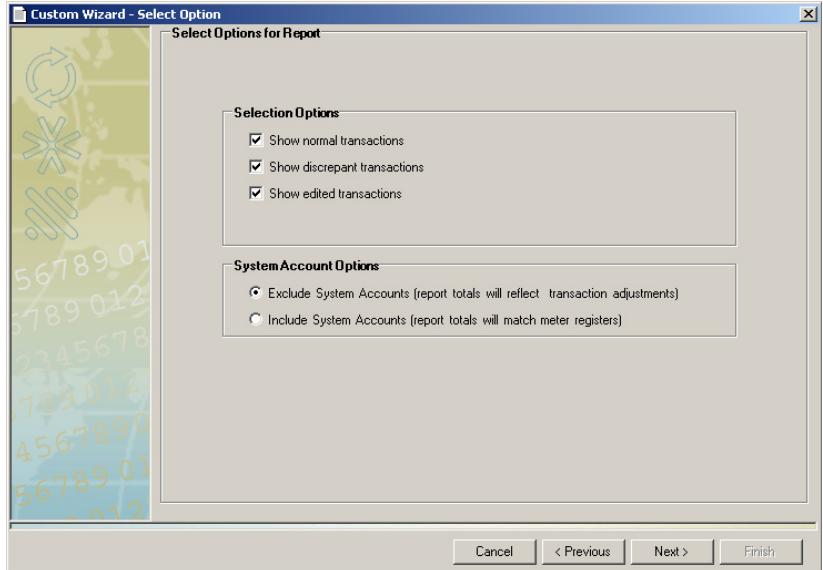
1. You can select any single option or all of the options listed under Selection Options, when the Selection Options section is present on the screen.

2. You can include or exclude system reports by clicking on the appropriate radio button.

   • *Including* system reports will result in report totals that match the meter registries.

   • *Excluding* system reports will result in report totals that reflect any transaction adjustments you may have made.

3. Click **Next >**. If you are using filters, the appropriate filter screen will appear. Refer to *Advanced Filtering Options* in this chapter for more information. Otherwise, go to *Selecting Grouping and Sort Order* in this chapter.

Advanced Filtering Options

Filtering Accounts

The *Select Accounts* screen allows you to select the accounts on which you are running the report. The first time you open this screen all of the accounts are selected. The box in front of "Automatically select dependent accounts" is checked by default. This ensures that when you select an account, all of its sub accounts and sub-sub accounts are selected.
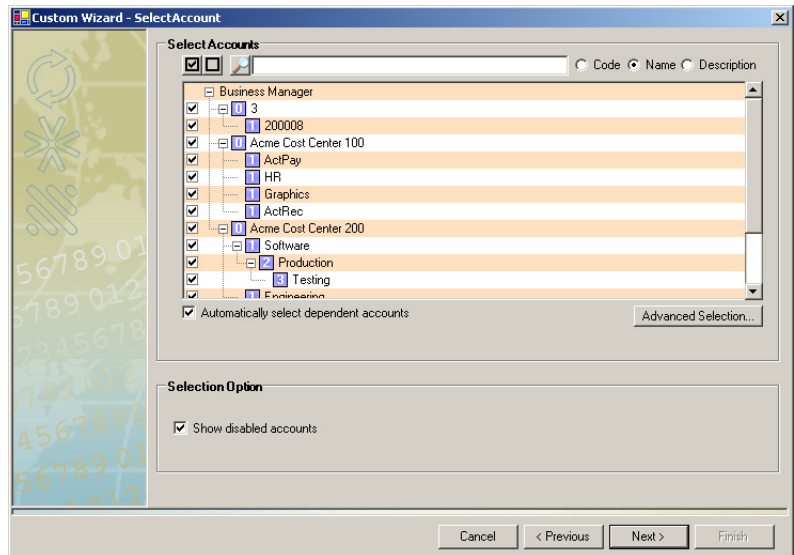
1. To deselect individual accounts, click in the check box in front of the each of the accounts to remove the check mark.

2. To deselect all accounts, click on the ▣ button at the top of the screen.

3. To select all accounts, click on the ☑ button at the top of the screen.

4. The Advanced Selection feature allows you to search for and select accounts from your account list. Refer to the *Advanced Account Selection* section in this chapter for more information.

5. Click **Next>**. If you are using any additional filters, the appropriate filter screen opens. Otherwise, continue to the *Selecting Grouping and Sort Order* section in this chapter.

Filtering Operators

The first time you open this screen, none of the operators are selected, as indicated by the empty check boxes in front of each operator name.

The box in front of "Show disabled operators" is checked by default. This ensures that all operators on the system appear in the list.
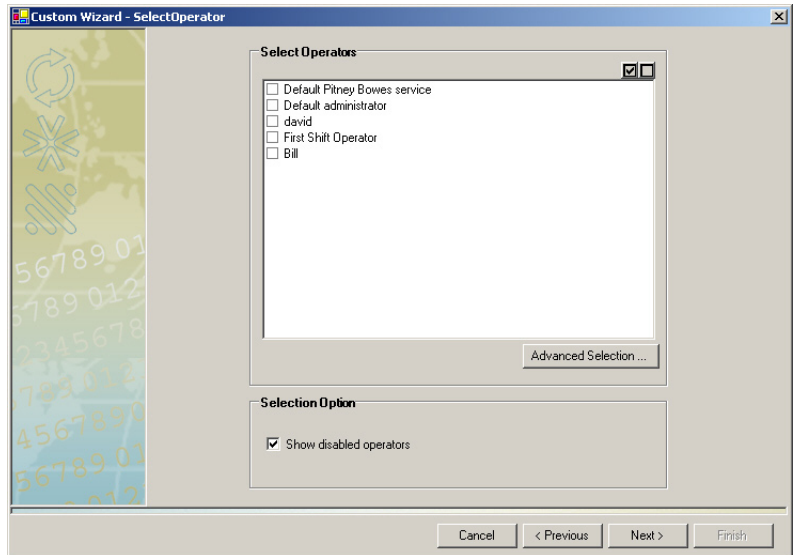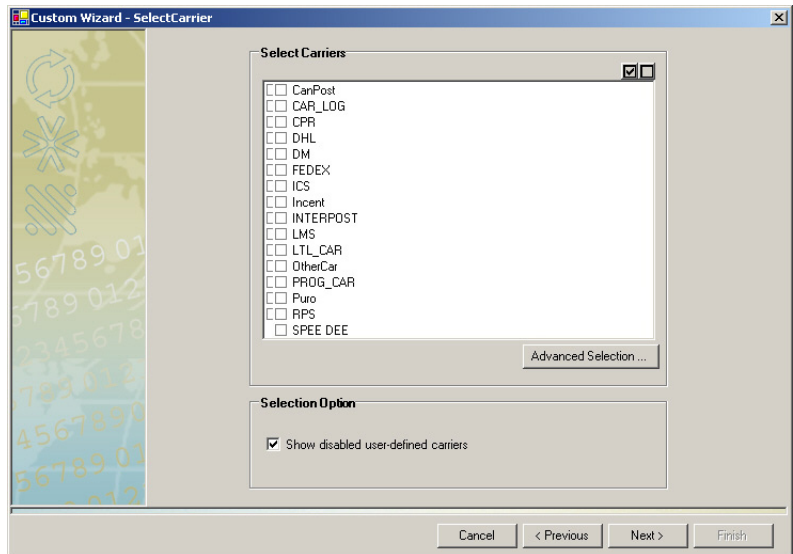

1. To select individual operators, click in the check box in front of each of the operator names to create a check mark.

2. To deselect all operators, click on the ▢ button at the top of the screen.

3. To select all operators, click on the ☑ button at the top of the screen.

4. The Advanced Selection feature allows you to search for and select operators from your operator list. Refer to the *Advanced Selection (All Other Filters)* section in this chapter for more information.

5. Click **Next>**. If you are using any additional filters, the appropriate filter screen opens. Otherwise, continue to the *Selecting Grouping and Sort Order* section in this chapter.

Filtering Jobs

The first time you open this screen, none of the jobs are selected, as indicated by the empty check boxes in front of each job name.
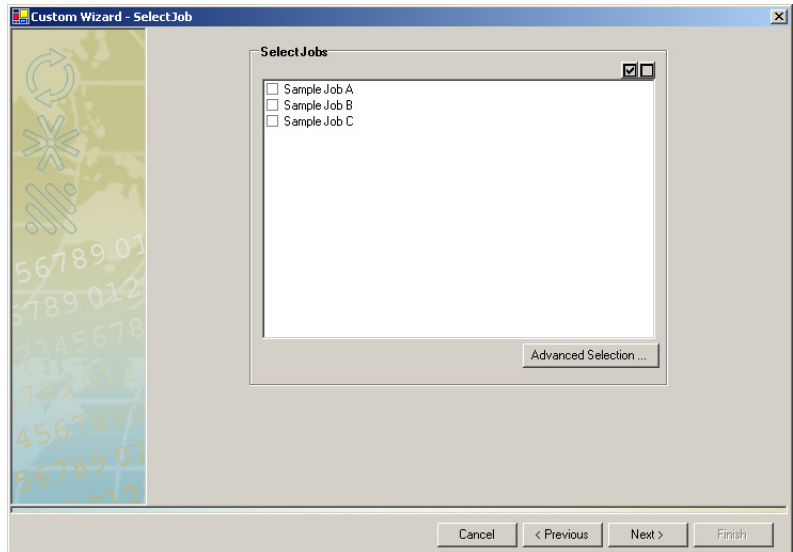
1. To select individual job, click in the check box in front of each of the job names to create a check mark.

2. To deselect all jobs, click on the ▣ button at the top of the screen.

3. To select all jobs, click on the ☑ button at the top of the screen.

4. The Advanced Selection feature allows you to search for and select jobs from your job list. Refer to the *Advanced Selection (All Other Filters)* section in this chapter for more information.

5. Click **Next>**. If you are using any additional filters, the appropriate filter screen opens. Otherwise, continue to the *Selecting Grouping and Sort Order* section in this chapter.

Filtering Workstations

The first time you open this screen, none of the workstations are selected, as indicated by the empty check boxes in front of each workstation name.

The box in front of "Show disabled workstations" is checked by default. This ensures that all workstations on the system appear in the list.
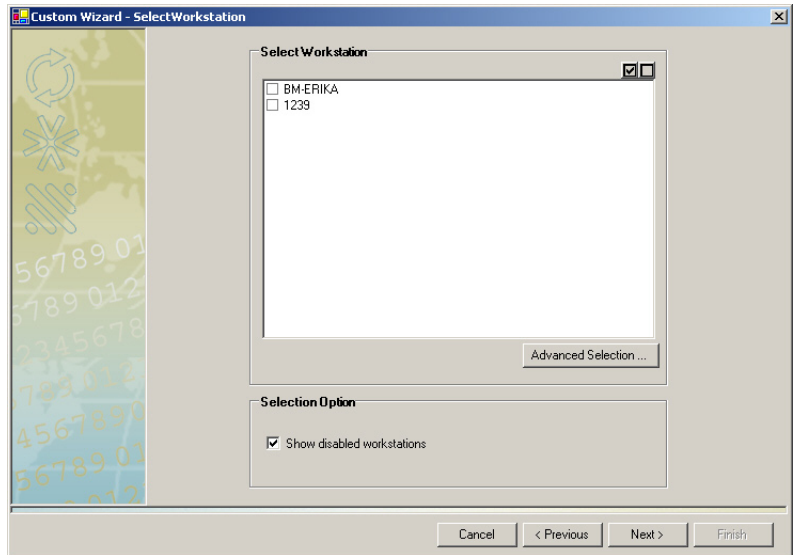
1. To select individual workstations, click in the check box in front of each of the operator names to create a check mark.

2. To deselect all workstations, click on the ▣ button at the top of the screen.

3. To select all workstations, click on the ▣ button at the top of the screen.

4. The Advanced Selection feature allows you to search for and select workstations from your workstation list. Refer to the *Advanced Selection (All Other Filters)* section in this chapter for more information.

5. Click **Next>**. If you are using any additional filters, the appropriate filter screen opens. Otherwise, continue to the *Selecting Grouping and Sort Order* section in this chapter.

Filtering Meters

The first time you open this screen, none of the meters are selected, as indicated by the empty check boxes in front of each meter name.

The box in front of "Show disabled meters" is checked by default. This ensures that all meters on the system appear in the list.
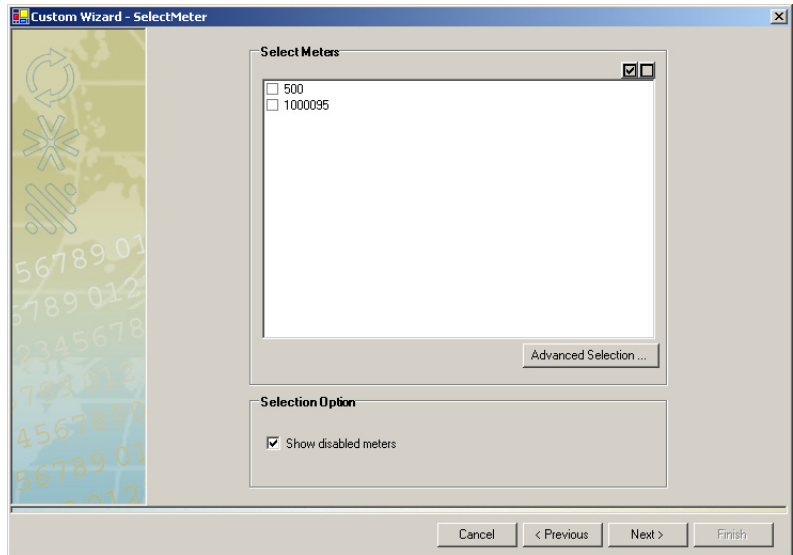
1. To select individual meters, click in the check box in front of each of the operator names to create a check mark.

2. To deselect all meters, click on the ▢ button at the top of the screen.

3. To select all meters, click on the ☑ button at the top of the screen.

4. The Advanced Selection feature allows you to search for and select meters from your meter list. Refer to the *Advanced Selection (All Other Filters)* section in this chapter for more information.

5. Click **Next>**. If you are using any additional filters, the appropriate filter screen opens. Otherwise, continue to the *Selecting Grouping and Sort Order* section in this chapter.

Filtering Carriers

The first time you open this screen, none of the carriers are selected, as indicated by the empty check boxes in front of each carrier name.

The box in front of "Show disabled user-defined carriers" is checked by default. This ensures that all user-defined carriers on the system appear in the list.

1. To select individual carriers, click in the check box in front of each of the operator names to create a check mark.

2. To deselect all carriers, click on the ▢ button at the top of the screen.

3. To select all carriers, click on the ☑ button at the top of the screen.

4. The Advanced Selection feature allows you to search for and select carriers from your carrier list. Refer to the *Advanced Selection (All Other Filters)* section in this chapter for more information.

5. Click **Next>**. If you are using any additional filters, the appropriate filter screen opens. Otherwise, continue to the *Selecting Grouping and Sort Order* section in this chapter.

Filtering Numeric Fields
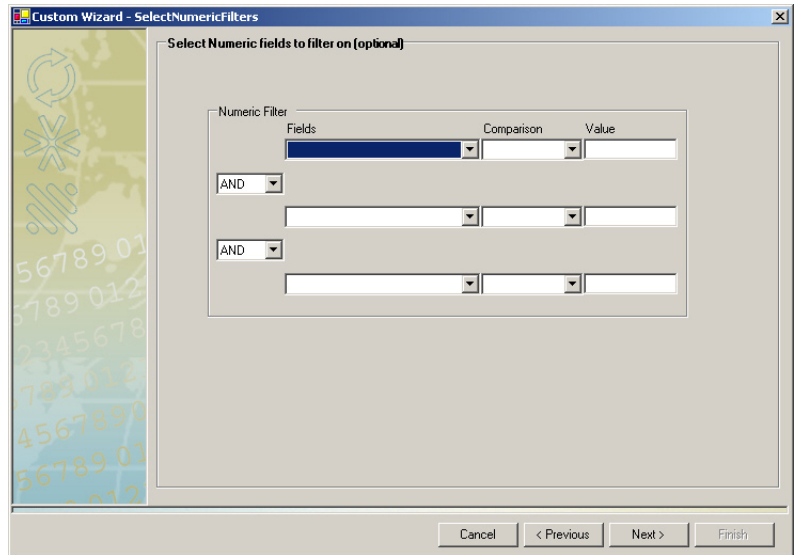
1. Select a field to filter from the Fields drop-down list.
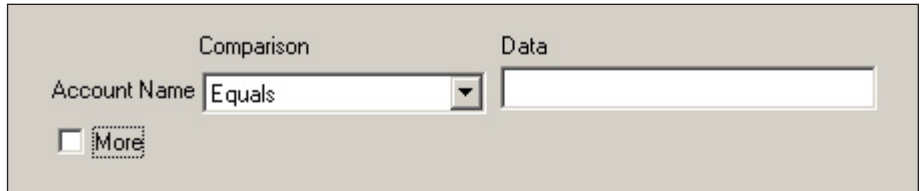
    NOTE: Only the numeric fields you selected will appear in this drop-down list.

2. Select the appropriate options from the Comparison drop-down list. The options are: Equals, Is Greater Than, Is Less Than, or Does Not Equal.

3. Type the appropriate value in the Value field.

4. If you will be adding additional filter parameters, select either **AND** *or* **OR** from the drop-down list.

5. Repeat steps 1-4 until you have finished entering the numeric filter information.

6. Click **Next>**. The *Selecting Grouping and Sort Order* screen opens.

Advanced Account Selection

Follow the steps below to filter accounts.

1. Click on the ▣ button at the top of the screen to deselect all of the accounts.

2. Click the **Advanced Selection** button. The *Advanced Search and Select* screen appears.

3. Select a search parameter from the **Comparison** drop-down list.

4. Type the appropriate information in the **Data** field.

5. Click the **More** check box to enter additional criteria. Otherwise, go to step 8.

6. Select **And** *or* **Or** from the drop-down list that appears.

7. Repeat steps 3-6 until you have finished selecting your search criteria.

8. Click the **Confirm** button. The information that corresponds with your search criteria will be selected.

Advanced Selection (All Other Filters)

Follow the steps below to filter operators, jobs, workstations, meters, or carriers.

1. Click the **Advanced Selection** button. The *Select Filter Criteria* screen appears.

2. Select a search parameter from the **Comparison** drop-down list.

3. Type the appropriate information in the **Data** field.

4. Click the **More** check box to enter additional criteria. Otherwise, go to step 8.

5. Select **And** *or* **Or** from the drop-down list.

6. Repeat steps 2-5 until you have finished selecting your search criteria.

7. Click the **Search** button. A dialog box will appear indicating the number of matches found on the system.

8. Click **OK**.

9. Click the **Close** button. The information that corresponded with your search criteria will be selected.

Selecting Grouping and Sort Order

The *Grouping and Sort Order* screen allows you to specify how the information in the report will be sorted. You can select the field(s) you want to group by, and the order you want the groupings to appear. (For example, first group by account, then by sub account, then by sub sub account.)

If you do not want to specify a field for grouping, click **Next >**.

GROUPING AND SORT ORDER NOTES:
- The list of available options in the drop-down lists will vary, depending upon the fields you select.
- This is an optional selection.
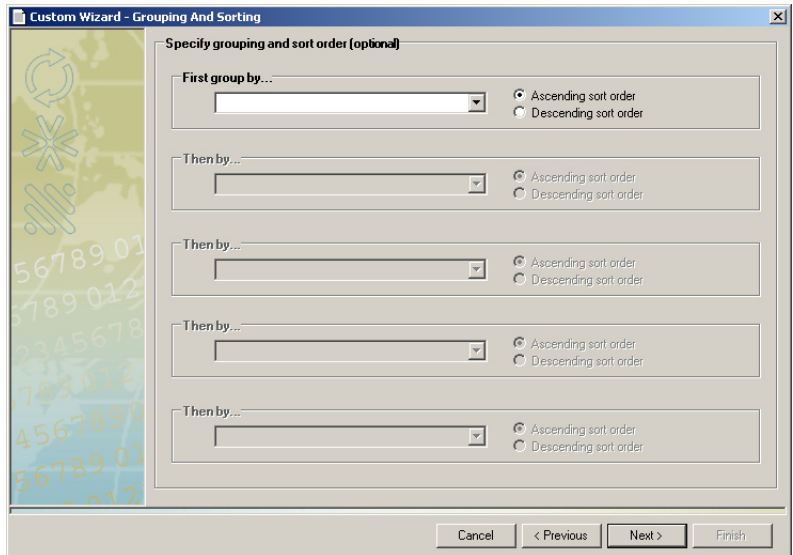
1. Select a field from the drop-down list.
2. Select the sort order by clicking the appropriate radio button.

    - Ascending order means smallest to largest (1 to 9, A to Z).

    - Descending order means largest to smallest (9 to 1, Z to A).

3. Click **Next >** once you have finished selecting the grouping and sort options. The *Report Layout* screen opens.

Formatting the Report

The Report Layout screen allows you to create a customized layout for your report. You can:

- Select your page settings (height, width, and margins),
- Specify where the fields appear on the page,
- Add labels and column headings,
- Insert graphics,
- Add summary information (e.g. totals, subtotals),
- Draw lines, and
- Insert page breaks.
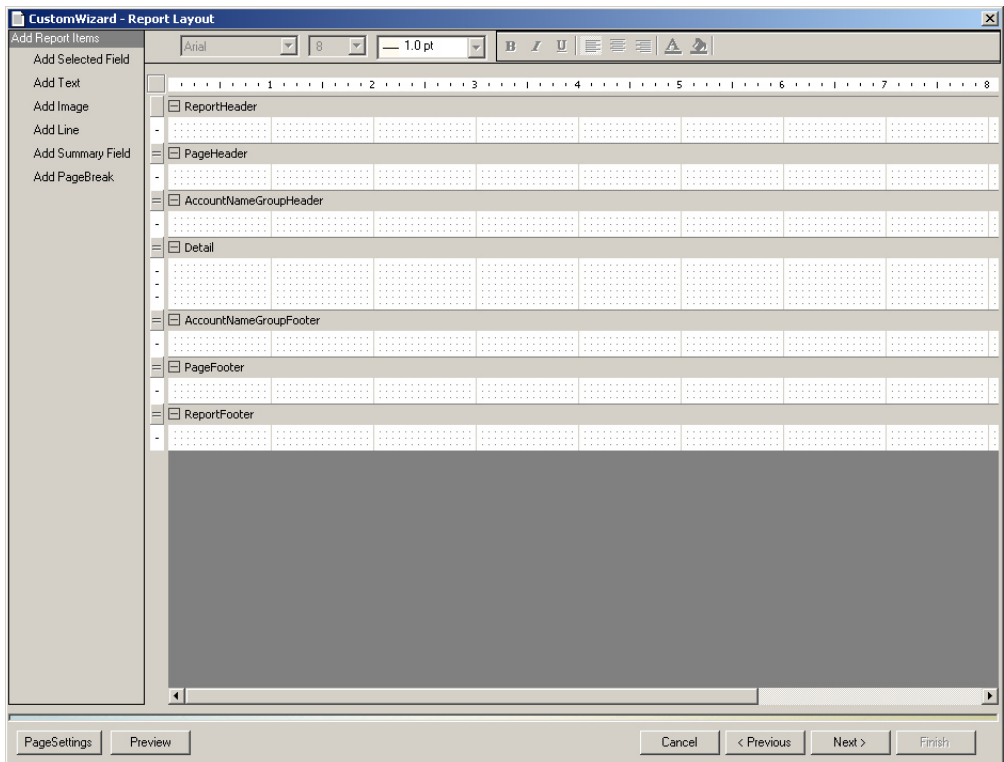
NOTE: You can preview your report at any time by clicking the **Preview** button.

Selecting the Page Settings
The first thing you want to do when creating a report is select the page settings.

1. To access the page settings, click the **Page Settings** button on the *Report Layout* screen. The Page Settings dialog box opens.
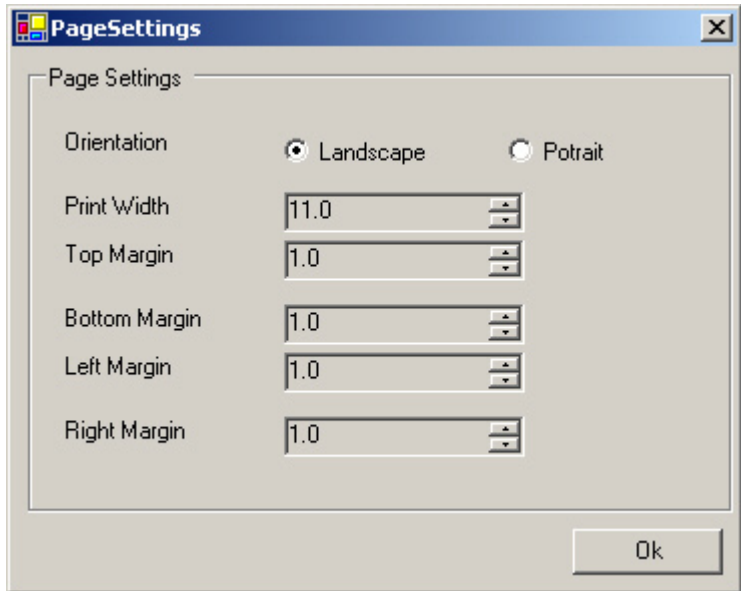
2. Select the paper orientation by clicking either the **Landscape** or **Portrait** radio button.
3. Use the up and down arrows to adjust the print width and margins.
4. Click **OK** once you have selected the page settings.

Using Header and Footer Rows

The Report Layout screen is divided up into a series of header and footer rows. You will place the information you want to appear in your report in these rows.

You can adjust the height of each row to fit the information you place in it.
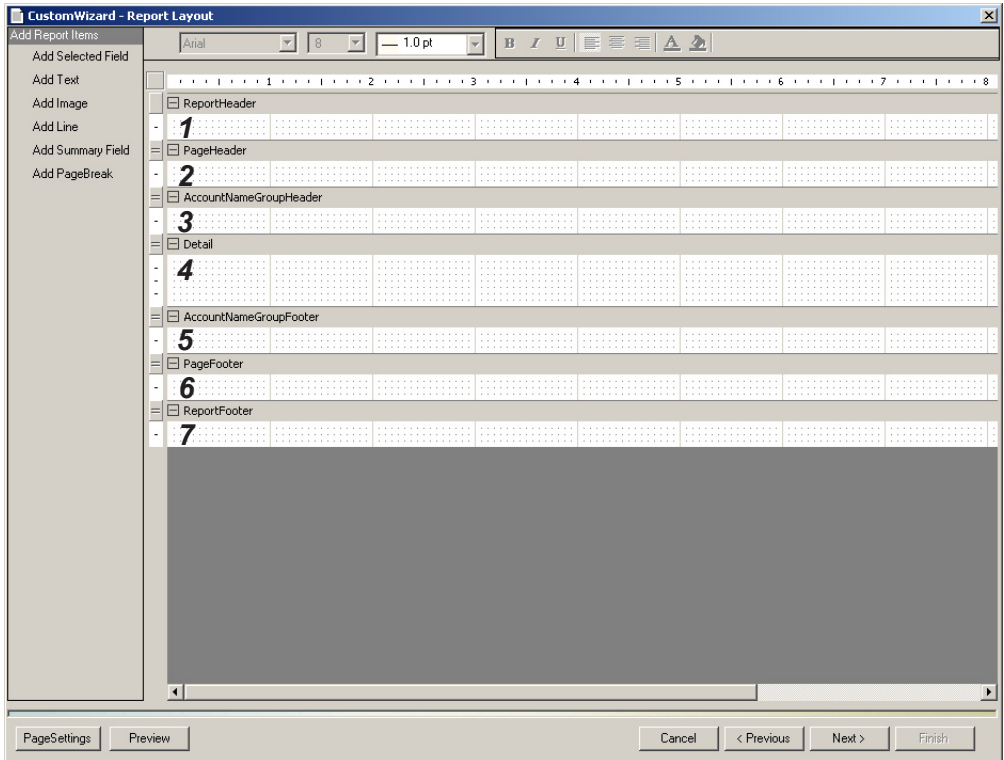
1. **Report Header—**Information in this row will appear once at the top of the first page of the report.

2. **Page Header—**Information in this row will appear at the top of each page of the report.

3. **Group Header(s)**—Information in this row will appear at the beginning of each subset of information in the report. The name, number and order of Group Header rows is determined by the fields you select on the *Grouping and Sort Order* screen.

4. **Detail**—Information in this row will appear in the body of the report.

5. **Group Footer(s)**—Information placed in this row will appear at the end of each subset of information in the report. The name, number and order of the Group Footer rows is determined by the fields you select on the *Grouping and Sort Order* screen.

6. **Page Footer**—Information in this row will appear at the bottom of each page of the report.

7. **Report Footer**—Information in this row will appear once at the bottom of the last page of the report.

Adding and Editing Report Items

The options featured under *Add Report Items* allow you to add and edit fields, text, images, lines, summary information and page breaks to your report.

When you finish laying out your report, click **Next >**. The *Report Name* screen opens.

Report Items	
Add Selected Field	*Adding Selected Fields* 1. Click **Add Selected Field** to add fields to your report. 2. Click and drag in the row where you want the field to appear. The *Add Selected Fields* dialog box appears. 3. Select the appropriate field name from the drop-down list. 4. Click **Ok**. The name of the field you selected will appear in the row. **NOTE:** You can adjust the size of the text box and reposition it within the row. You can also apply attributes (such as font, size, color, etc.) using the tool bar at the top of the screen. *Editing Selected Fields* 1. Click on the field you want to edit. 2. Click the **Change Selected Field** button. The *Add Selected Fields* dialog box appears. 3. Make the appropriate changes and click **Ok**.
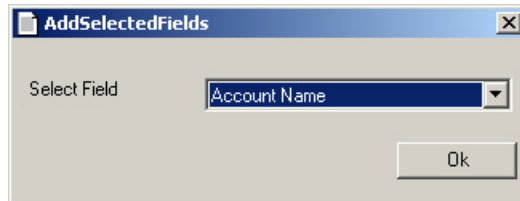
Report Items	
Add Text	*Adding Text* 1. Click **Add Text** to add labels and column headings to your report. 2. Click and drag in row where you want the text to appear. The *Add Text* dialog box appears. **Add Text** Text Name [ ] Ok 3. Type the text you want to add in the field provided. 4. Click **Ok**. The text you typed will appear in the row. **NOTE:** You can adjust the size of the text box and reposition it within the row. You can also apply attributes (such as font, size, color, etc.) using the tool bar at the top of the screen. *Editing Text* 1. Click on the text you want to edit. 2. Click the **Change Text** button. The *Add Text* dialog box appears. 3. Make the appropriate changes and click **Ok**.

Report Items	
Add Image	*Adding Images*
	1. Click **Add Image** to add graphics to your report.
	2. Click and drag in the row where you want the image to appear. The *Add Image* dialog box appears.

<div align="center">

AddImage

Select Image [_____] [Browse...]

[Ok]

</div>
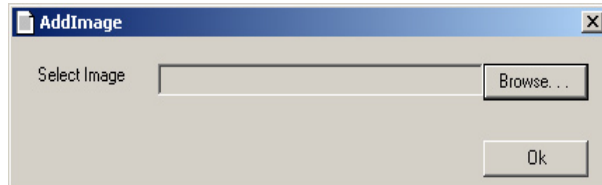
3. Click the **Browse** button. The *Open* dialog box appears.
4. Navigate to and select the appropriate image file.
5. Click **Open**. The image you selected will appear in the row.

> **NOTE:** Depending upon the size of the image, you may need to adjust the size of the frame around the image and adjust the height of the row to display the image properly.

Editing Images

1. Click on the image you want to edit.
2. Click the **Change Image** button. The *Add Image* dialog box appears.
3. Follow steps 3-5 in *Adding Images*, above, to change the image.

Report Items	
Add Summary Field	*Adding Summary Fields* 1. Click **Add Summary Field** to add summary information (totals) to your report. 2. Click and drag in the row where you want the summary field to appear. The *Add Summary Field* dialog box appears. ![AddSummaryField dialog box showing: Field to be Summarized - Number of Pieces; Type of Summary - Sum(SubTotal); Summary Group (This group would be used to reset summary value when calculating summary) - Account Name; Ok button] 3. Select the appropriate field from the *Field to be Summarized* drop-down list. 4. Select the appropriate summary type from the *Type of Summary* drop-down list. You can choose from: Sum (Subtotal), Sum (Grand Total), Average, Count, Minimum and Maximum. 5. Select the appropriate summary group from the *Summary Group* drop-down list. 6. Click **Ok**. The name of the field you selected will appear in the row. *Editing Summary Fields* 1. Click on the text you want to edit. 2. Click the **Change Summary Field** button. The *Add Summary Fields* dialog box appears. 3. Follow steps 3-6 in *Adding Summary Fields*, above, to edit the summary fields.
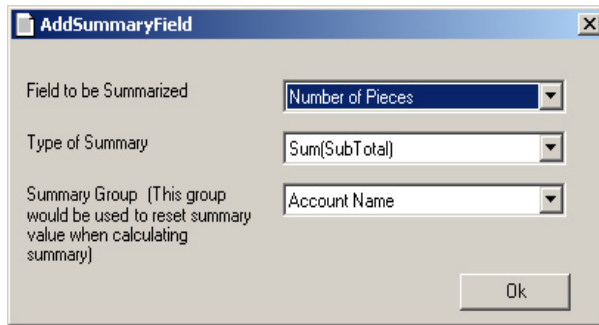
Report Items	
Add Line	*Adding Lines* 1. Click **Add Line** to add horizontal and vertical lines to your report. 2. Click and drag to draw the line. *Editing Lines* Click on the line you wish to edit and resize or reposition as necessary.
Add PageBreak	*Adding Page Breaks* 1. Click **Add PageBreak** to a page break to your report. 2. Click and drag in the location where you want the page break to occur. *Editing Page Breaks* Click on the page break you wish to edit and resize or re-position as necessary.

Deleting Report Items

To delete a selected or summary field, text, image, line or page break from the report layout, simply click on the item and press **Delete**.

Naming, Printing, and Saving the Report

The *Report Name* screen allows you to name, print and save your custom report.

1. By default, Business Manager names your custom report. You can either accept the default name, or click in the **Enter Report Name** field and type in a unique report name.
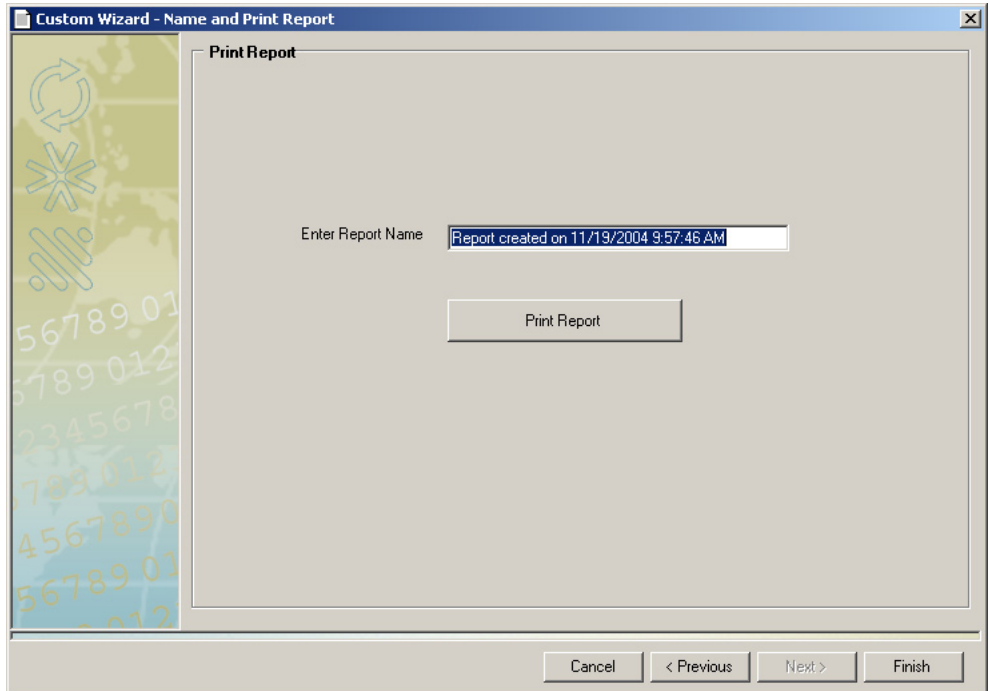
2. Click the **Print Report** button to print the report.
3. Click **Finish** to save the report. The *Custom Report Wizard* will close.

The *Reports* screen will open. The name of the report you created will appear in the list on the Custom Report tab.

Editing a Custom Report

You can edit a custom report once it has been created.

REPORT EDITING NOTES:
- You can quit editing a report at any time by clicking on the **Cancel** button. However, your changes will not be recorded in the report.
- To save changes to your report, you must click the **Finish** button on the *Report Name* screen.

1. Select **Reports | Reports**.
2. Click on the **Custom Reports** tab.
3. Click on the name of the report you want to edit.
4. Click the **Custom Report** button and select **Edit Report**.
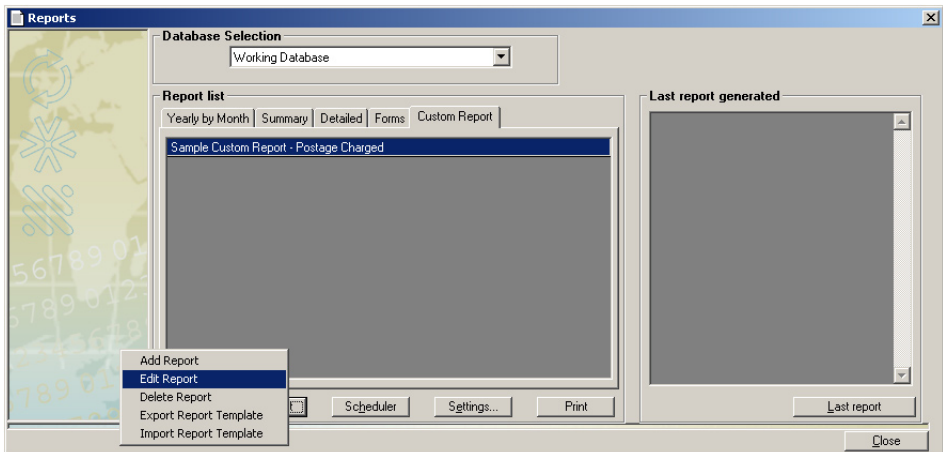
The *Select Field* screen opens.

Follow the steps in the previous sections, beginning with *Selecting the Fields* to edit the report.

Deleting a Custom Report

You can delete a custom report once it has been created.

1. Select **Reports | Reports**.
2. Click on the **Custom Reports** tab.
3. Click on the name of the report you want to delete.
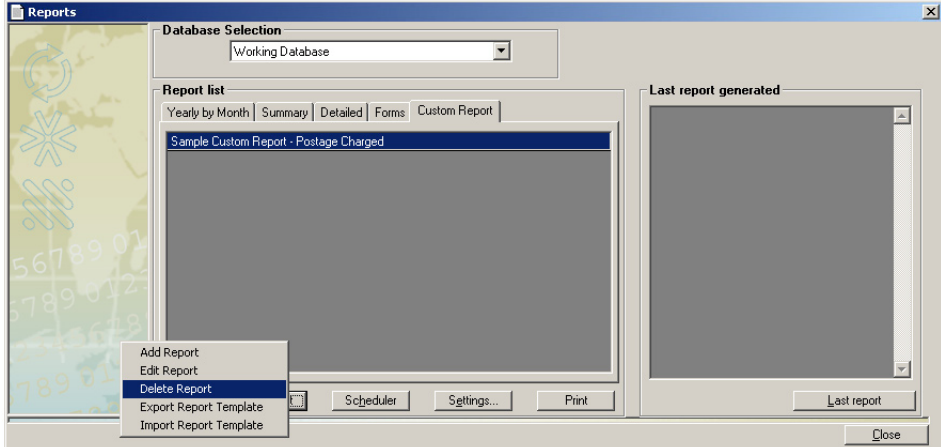
4. Click the **Custom Report** button and select **Delete Report**. A dialog box appears.
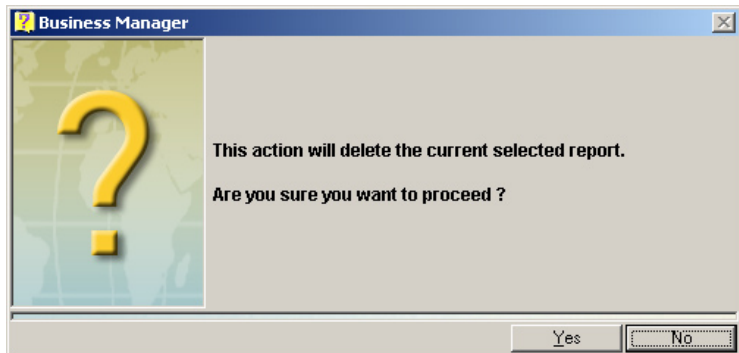
5. Click **Yes**. The report will be deleted from the custom report list.

Chapter 12 - Exporting and Importing Data

Exporting Business Manager Data

You can export the following information from the Business Manager database:

- Accounts
- Operators
- Transactions
- Carriers, Classes and Fees
- Reports

Supported export data formats

You can export this information to one of the following file formats:

- A comma separated file where the data fields for each record are quote-enclosed and separated by a comma. This file has a *.csv* extension on the end of the exported file name, for example, accounts.csv.

  For example, when exporting accounts, a typical record in this file will be in the following format:

"Account name","Sub account name","Sub sub account name","Label","Active"

  The names of the data fields are enclosed in quotes, while the data fields are each separated by a comma.

- A user defined character delimited file where you can define the character that encloses each record field and the character that separates the record data fields. This file also has a *.csv* extension on the end of the exported file name.
- A fixed length export file where you can set the length of each of the record data fields. This file has a *.txt* extension on the end of the exported file name.

View/edit exported files

You can open and edit the *.csv* and *.txt* files using Notepad.

Exporting Accounts

You export accounts at the Business Manager Host PC using the Administration module.

You can export your Business Manager accounts to a comma separated or fixed length text file. You can then import this file into Microsoft® Excel or Crystal Reports® or some other spreadsheet or report generating program.

You can also export accounts in a format specifically for importing into another Business Manager host system.

Exporting accounts to comma separated or fixed length file

1. Select **Parameters | Accounts and clients**. The *Clients and Accounts* screen opens.

2. Click on the **Export and Import** button at the bottom of the screen and select **Export** from the drop-down menu.

3. Click on the down arrow in the "Code Name" field and select **All**, **=** or **Partial**.
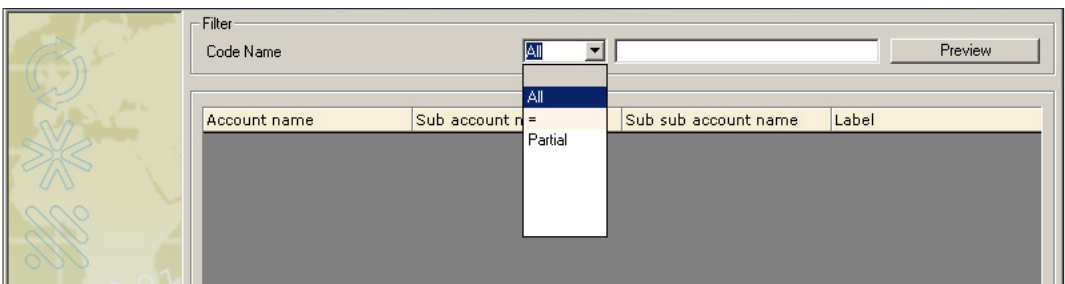
    a. Select **All** to export all accounts in the database.

    b. Select **=** if you want to limit the accounts for export to a specific account (or top level account and all of its sub accounts and sub-sub accounts). Enter the account code name in the field next to the **Preview** button.

    c. Select **Partial** to select all those accounts whose account names contain certain characters. Type the characters you want to match in the field next to the **Preview** button. For example, you can select all the accounts that contain "acme" by typing that in the field.

4. Once you choose how to select the accounts for export, click the **Preview** button. A list of accounts appears in the export screen.

5. Verify the accounts are correct and click **Export** at the bottom of the screen. The *Account Export* screen opens.

6. Click on **Browse** and the *Select Export File* screen opens.

    a. Click in the "Save in" field and select the directory where you want to save the exported file.

    b. Click in the "File name" field and type in the name you want to assign to the exported file.

    c. Click **Save**. The name and directory location appears in the field next to the **Browse** button.

7. To export to a delimited text file click on the option button in front of "Delimited Text (ASCII)".

   a. To change the character separating the data fields, click in the "Character delimiting fields" box and enter the new character value.

   b. To change the character enclosing the data fields, click in the "Character surrounding text" box and enter the new character value.

8. To export to a fixed length file click on the option button in front of "Fixed Length Text (ASCII)".

   a. To change the length of any of the data fields, click in the "Size" column next to the name of the data field and type in the new numeric value.

9. Click on the **Export** button and the message "The file was exported properly" is displayed. Click **Ok** and the *Clients and Accounts* screen reappears.

Exporting to a file for Business Manager

To export accounts to a format for importing into another Business Manager host:

1. Select **Parameters | Accounts and clients**. The *Clients and Accounts* screen opens.

2. Click on the **Export and Import** button at the bottom of the screen and select **Export to Business Manager** from the drop-down menu.

3. You are prompted to select the target directory for storing the exported file. Browse to the correct directory and click **Ok**.

4. The system stores the exported file in the target directory as **BusinessManagerAccounts.zip**.

> **NOTE:** You can only import this file into a new Business Manager site that currently has no accounts.

Exporting Operators   You export operators at the Business Manager Host PC using the Administration module.

To export operators:

1. Select **Parameters | Configuration | Environment | Users**. You are prompted to enter your password. Once you enter your password, the *Users* screen appears and lists all of the current operator login names.

2. Click on the **Export and Import** button at the bottom of the screen and select **Export** from the drop-down menu. The *User Export* screen opens.
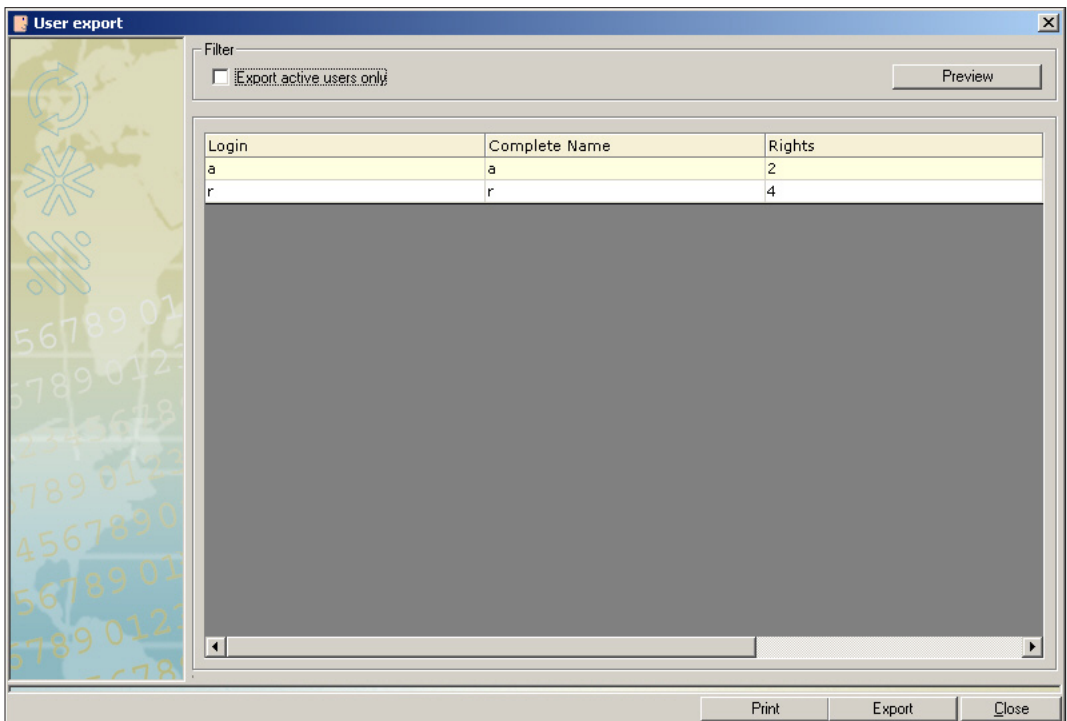
3. To export only active users, click in the box in front of "Export active users only".

4. Click on the **Preview** button, and then **Export** button. The *User export* screen opens.

5. Click on **Browse** and the *Select Export File* screen opens.

   a. Click in the "Save in" field and select the directory where you want to save the exported file.

   b. Click in the "File name" field and type in the name you want to assign to the exported file.

   c. Click **Save**. The name and directory location appears in the field next to the **Browse** button.

6. To export to a delimited text file click on the option button in front of "Delimited Text (ASCII)".

   a. To change the character separating the data fields, click in the "Character delimiting fields" box and enter the new character value.

   b. To change the character enclosing the data fields, click in the "Character surrounding text" box and enter the new character value.

7. To export to a fixed length file click on the option button in front of "Fixed Length Text (ASCII)".

a. To change the length of any of the data fields, click in the "Size" column next to the name of the data field and type in the new numeric value.

8. Click on the **Export** button and the message "The file was exported properly" is displayed. Click **Ok** and the *Users* screen reappears.

Exporting Transactions

You export transactions at the Business Manager Host PC using the Administration module.

To export transactions:

1. Select **Transactions | Display mail piece detail**. The *Transactions Details* screen opens.

2. Use this screen to select the transaction details you want to export (for example, the transaction number, account code, number of processed mail pieces etc). Refer to *Viewing Transaction Details* in *Chapter 7* of this guide for more information.

3. Click the **Export and Import** button at the bottom of the screen and click on **Export** from the drop-down menu. The *Transaction Export* screen opens.
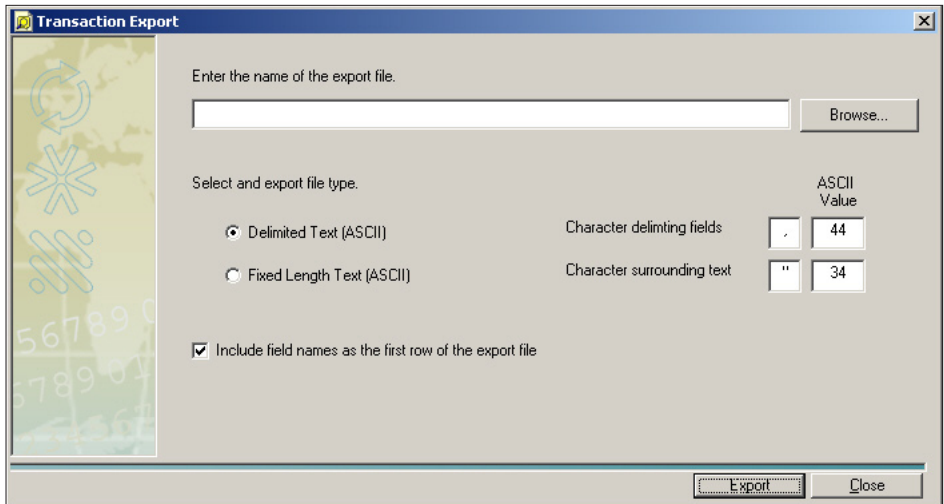
4. Click on **Browse** and the *Select Export* screen opens.

   a. Click in the "Look in" field and select the directory where you want to save the exported file.

   b. Click in the "File name" field and type in the name you want to assign to the exported file.

   c. Click **Open**. The name and directory location appears in the field next to the **Browse** button.

5. To export to a delimited text file click on the option button in front of "Delimited Text (ASCII)".

   a. To change the character separating the data fields, click in the "Character delimiting fields" box and enter the new character value.

   b. To change the character enclosing the data fields, click in the "Character surrounding text" box and enter the new character value.

6. To export to a fixed length file click on the option button in front of "Fixed Length Text (ASCII)".

a. To change the length of any of the data fields, click in the "Size" column next to the name of the data field and type in the new numeric value.

7. Click on the **Export** button and the message "The file was exported properly" is displayed. Click **Ok** and the *Transaction Display* screen reappears. Click **Close**, then **Close** again.

Exporting Carriers, Classes and Fees

You export user defined carriers, classes and fees at the Business Manager Host PC using the Administration module.

To export carriers, classes and fees:

1. Select **Parameters | Configuration | Carriers, Classes and Fees | User Defined Carriers, Classes and Fees**. The *Manage User Defined Carrier, Classes and Fees* screen opens.
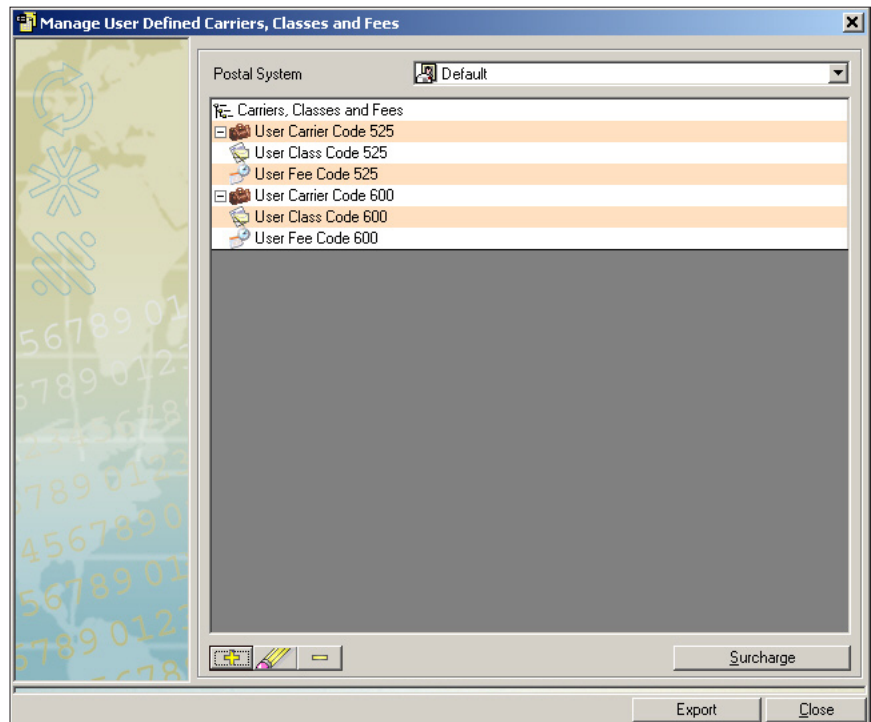
2. Click **Export** on the bottom of the screen and select either **Export Carrier**, **Export Class**, or **Export Fees** from the drop-down menu. The example shown here is for exporting carriers but the procedure is the same for classes and fees.
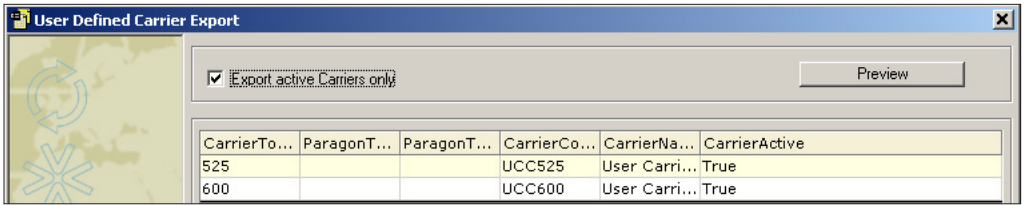
3. To export only active carriers, click in the box in front of "Export active carriers only".

4. Click **Preview**, then click **Export** at the bottom of the screen. The *User Defined Carrier Export* screen opens.
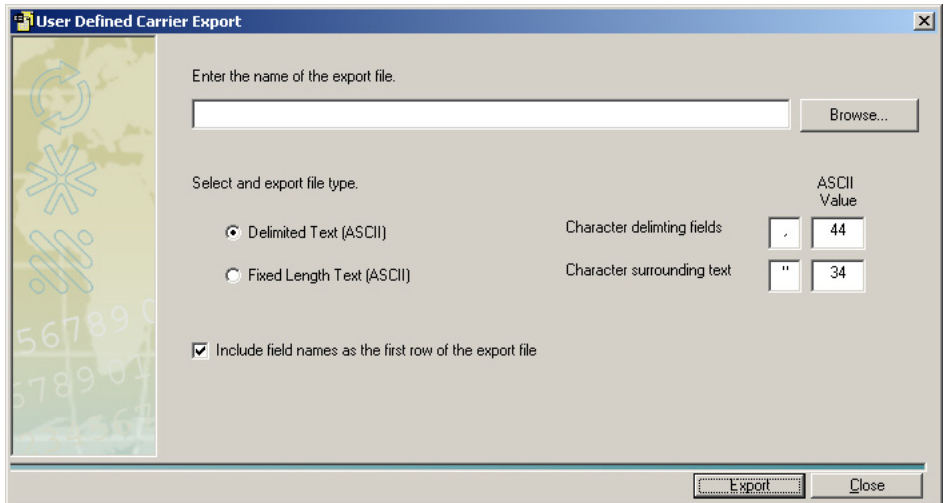
5. Click on **Browse** and the *Select Export File* screen opens.

   a. Click in the "Save in" field and select the directory where you want to save the exported file.

   b. Click in the "File name" field and type in the name you want to assign to the exported file.

   c. Click **Save**. The name and directory location appears in the field next to the **Browse** button.

6. To export to a delimited text file click on the option button in front of "Delimited Text (ASCII)". To export to a fixed length file, go to step 7.

   a. To change the character separating the data fields, click in the "Character delimiting fields" box and enter the new character value.

   b. To change the character enclosing the data fields, click in the "Character surrounding text" box and enter the new character value.

7. To export to a fixed length file click on the option button in front of "Fixed Length Text (ASCII)".
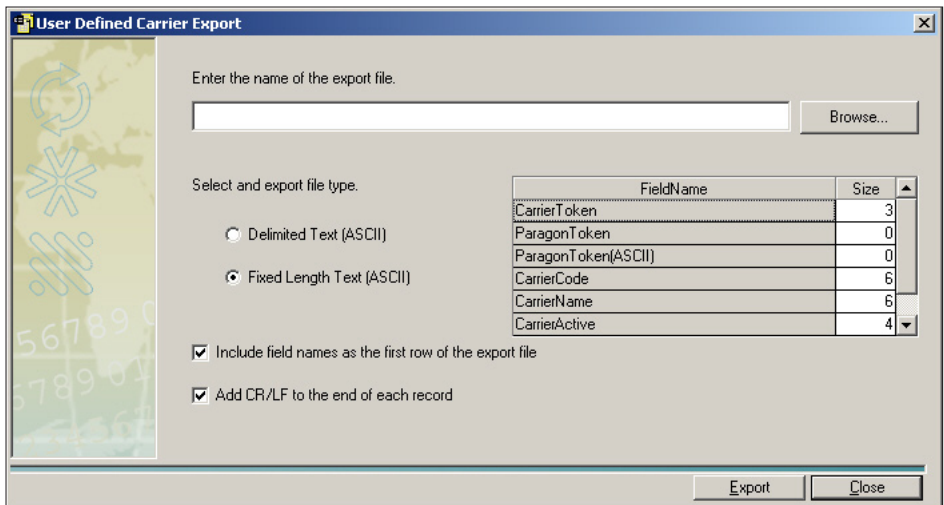
8. Click on the **Export** button and the message "The file was exported properly" is displayed. Click **Ok**, then click **Close**.

Exporting Standard Reports

You export reports at the Business Manager Host PC using the Administration module.

To export standard reports:

1. Select **Reports | Reports**.

2. Click on and highlight the specific report, then click in the **Settings** button at the bottom of the screen. For detailed information on this operation, refer to *Viewing and Printing Reports* in *Chapter 10* of this guide.

3. Make any modifications required, then click **Show Report**. This displays the report on the screen.

4. Click on **Export** at the top of the screen. The *Export Report* dialog appears.

5. Navigate to the appropriate directory, type in a name for the report, and select **PDF** as the file type.

6. Click **Save**.

7. The report is saved as a PDF file.

Importing Custom Report Templates

You import custom report templates at the Host PC using the administration module.

To import a *new* custom report template:

1. Select **Reports | Reports**.

2. Click the **Custom Report** button and select **Import Report Template**.
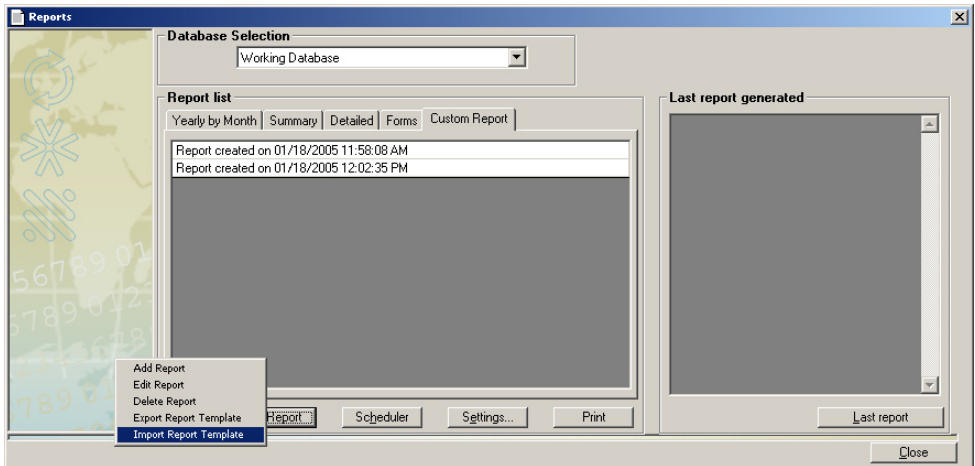
The *Open* dialog appears.

3. Navigate to the appropriate directory and select the file you want to import.

NOTE: Custom report templates are imported and exported as .bmr files.

4. Click **Open**.

> **NOTE:** If the name of the custom report template already exists on the system, the *MNTools* dialog appears.
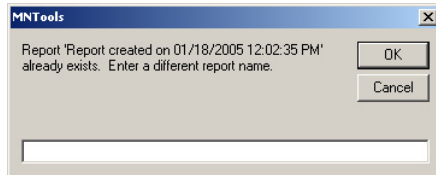
To save the template with a new name:
- Type a new report name in the field at the bottom of the dialog.
- Click **OK**, then proceed to step 5.

To cancel the import:
- Click **Cancel**. A dialog appears asking if you are sure you want to cancel the import.
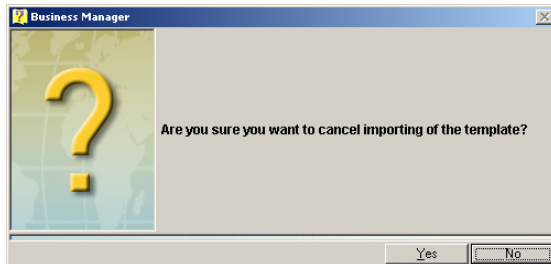
- Click **Yes**. A dialog appears indicating that Business Manager did not import the custom report template.
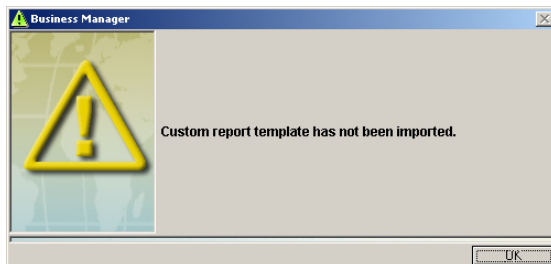
- Click **OK**.

5. The Business Manager dialog box appears.
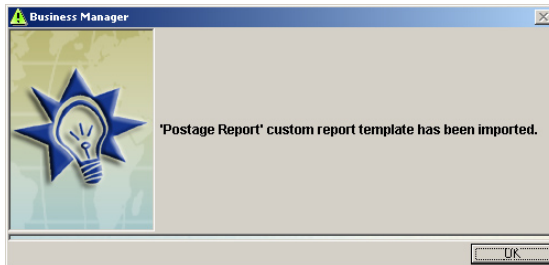
Click **OK**. The name of the new custom report template appears on the Custom Report tab.

Exporting Custom Report Templates

You export custom report templates at the Host PC using the administration module.

To export a custom report template:

1. Select **Reports | Reports**.

2. Click on and highlight the report, then click the **Custom Report** button and select **Export Report Template**.
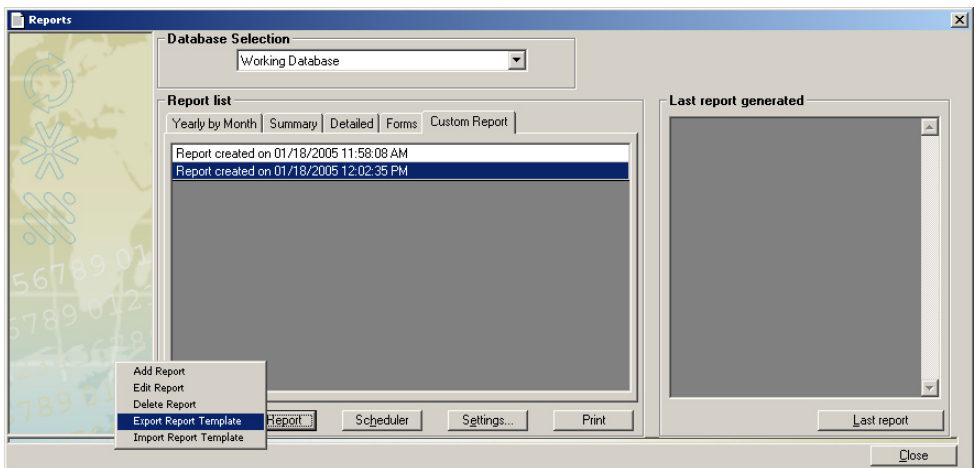
3. Navigate to the appropriate directory and type a name for the custom report template file.

4. Click **Save**.

5. A dialog appears indicating the name and location of the export file.
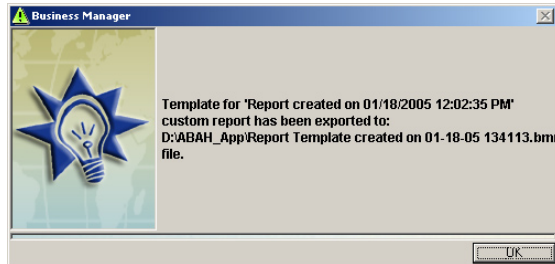
6. Click **OK**.

Managing Ascent® Accounts and Operators

You can manage the accounts and operators on your Ascent® carrier management and shipping system by creating the Ascent® accounts and operators at the Business Manager Host PC and then exporting them to Ascent®.

At the beginning of each day on Ascent®, you open a new manifest for each carrier you use. At the end of the day, you close all of your manifests on Ascent® and export the transaction information for all carriers to Business Manager. In this way, you can manage all of your Ascent® accounts and their corresponding transactions using Business Manager.

The procedures for managing your Ascent® accounts and operators are described in the following sections:

- Exporting Accounts from Business Manager to Ascent®
- Importing Accounts into Ascent®
- Exporting Operators from Business Manager to Ascent®
- Importing Operators into Ascent®
- Importing Ascent® Transactions into Business Manager

Exporting Accounts from Business Manager to Ascent®

You export accounts at the Business Manager Host PC using the Administration module.

1. Select **Parameters | Accounts and clients**. The *Clients and Accounts* screen appears.

2. Click on the **Export and Import** button at the bottom of the screen and select **Export to Ascent** from the drop-down menu.

3. The *Account export* screen opens.

4. Click in the "Filter column" field select the appropriate filter from the drop-down menu (the default is All).

5. Click on the **Preview** button and all of the accounts appear in the list box within the *Ascent Account export* screen.

6. Make sure the click box in front of "Export the column headers" is unchecked.

7. Click on the [...] button next to the "Export directory" field and select the destination directory where you want to save the exported file and click **Ok**.

8. Click on in the "File name" field and enter the name, **Acntexp.**

9. Click on the **Export** button. The message "Account export completed successfully" appears. Click on **Ok**.

10. Using Windows Explorer, locate the file you just exported and verify that it has the name:

    Acntexp.eqt

    NOTE: All Ascent account names are exported as UPPER case names.

    ---

11. You can set up your system to automatically export account to Ascent®. Refer to *Scheduling Automatic Ascent® Exports/Imports* in this chapter.

Importing Accounts into Ascent®

1. At the Ascent PC, open the Ascent® folder.

2. Double click on the **Ascent Setup** icon. This starts the | Ascent® program.

3. From the Main menu, click on **File** and choose **Import DB Data** from the drop-down menu.

4. Verify that the entry **ACCU-ACNT** appears in the "Import Code" field.

5. The name appearing in the "Import File Name" field is acnt-exp.eqt. This is also the name of the account export file you create on Business Manager when you export the accounts.

6. Browse to the folder or drive containing the acntexp.eqt file.

7. Click in the "Import Mode" field and choose the **Keep Existing** option from the drop-down menu.

WARNING! Do not choose Overwrite Existing!

8. Click **Ok** to import the accounts from actntexp.eqt.

Exporting Operators from Business Manager to Ascent®

You export operators at the Business Manager Host PC using the Administration module. You must be a manager to perform this operation.

1. Select **Parameters | Configuration | Environment | Users**.

2. You are prompted to enter your password. Enter the password and click on **Confirm**.

3. Click on the **Export and Import** button at the bottom of the screen and select **Export to Ascent** from the drop-down menu.

4. Click on the **Export** button at the bottom of the screen. The *Select Export File* screen appears.

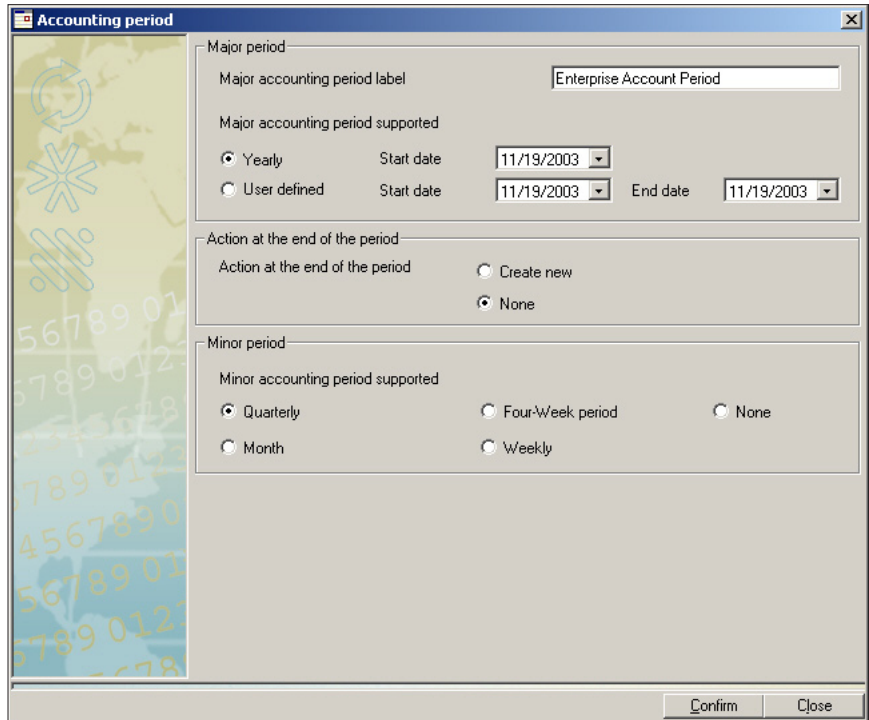   a. Click in the "Save in" field and select the directory where you want to save the export file.

    b. Type in the name, **Userexp**. Make sure EQT appears in the "Save as type" field.

    c. Click **Save** and the message "Export Succeeded" appears.

5. Using Windows Explorer, locate the file you just exported and verify that it has the name:

    Userexp.eqt

    NOTE: All Ascent operator names are exported as UPPER case names.

    ---

6. You can set up your system to automatically export operators to Ascent®. Refer to *Scheduling Automatic Ascent® Exports/Imports* in this chapter.

Importing Operators into Ascent®

1. At the Ascent® PC, open the Ascent® folder.
2. Double click on the **Ascent Setup** icon. This starts the Ascent® program.
3. From the Main menu, click on **File** and choose **Import DB Data** from the drop-down menu.
4. Click in the "Import Code" field and select **ACCU-OP** from the drop-down menu.
5. The name appearing in the "Import File Name" field changes to **userexp.eqt**. This is also the name of the operator export file you create on Business Manager when you export the operators.
6. Browse to the folder or drive containing the acntexp.eqt file.
7. Click in the "Import Mode" field and choose the **Keep Existing** option from the drop-down menu.

WARNING! Do not choose Overwrite Existing!

8. Click **Ok** to import the operators from **userexp.eqt**.

*Importing Ascent®
Transactions into
Business Manager*

1. Locate the Ascent® ato transaction file on the Ascent® PC. This file is created on the Ascent® whenever you open a carrier manifest. The location of the directory containing the ato files depends on how your Ascent® system is set up.

2. Copy the appropriate ato file to a floppy disk or to an appropriate network drive.

3. Log onto the Business Manager Host PC or on to a Data Collector PC.

4. If the ato file is on a floppy disk, insert the floppy disk into the floppy drive on the host or Data Collector PC.

5. Select **Transactions | Display mail piece detail**. The *Transaction Details screen* opens.
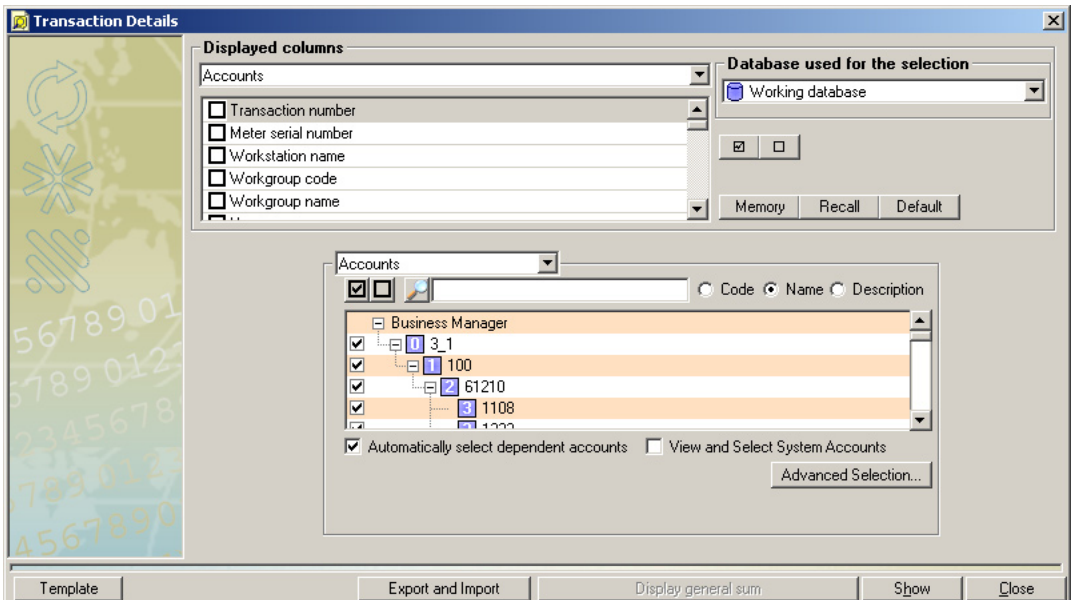
6. Click on the **Export and Import** button at the bottom of the screen and select **Import From Ascent** from the drop-down menu.

7. At the *Transaction import* screen, click on the **Select file** button. Browse to the floppy disk or the network directory containing the ato file. Select the file and click **Open**.

8. A list of the transactions in the ato file appears in the *Transaction import* screen display area.

9. Click on the **Import** button. The progress of the import process is displayed in the *Transaction import* process log section of this screen.

10. To view the imported transactions, click on the **Close** button and the *Display mail piece detail* screen reappears. Refer to *Viewing Transaction Details* in *Chapter 7* of this guide to determine the various ways in which you can display the transaction data.

11. You can set up your system to automatically import Ascent® transactions into Business Manager. Refer to *Scheduling Automatic Ascent® Exports/Imports* in this chapter.

Scheduling Automatic Exports and Imports for Ascent®

You can use the Business Manager Task Scheduler to have your system automatically perform an import of transactions from Ascent®, and an export of accounts and/or operators from Business Manager to Ascent®.

1. Select **Parameters | Configuration | Task Scheduler**. The *Task Scheduler* screen opens.

2. Click in the "Select a Task" field and choose either

   Import Transactions from Ascent, or,

   Export Accounts and Operators to Ascent.

3 For importing transactions, go to step 4. For exporting accounts and/or operators, go to step 9.
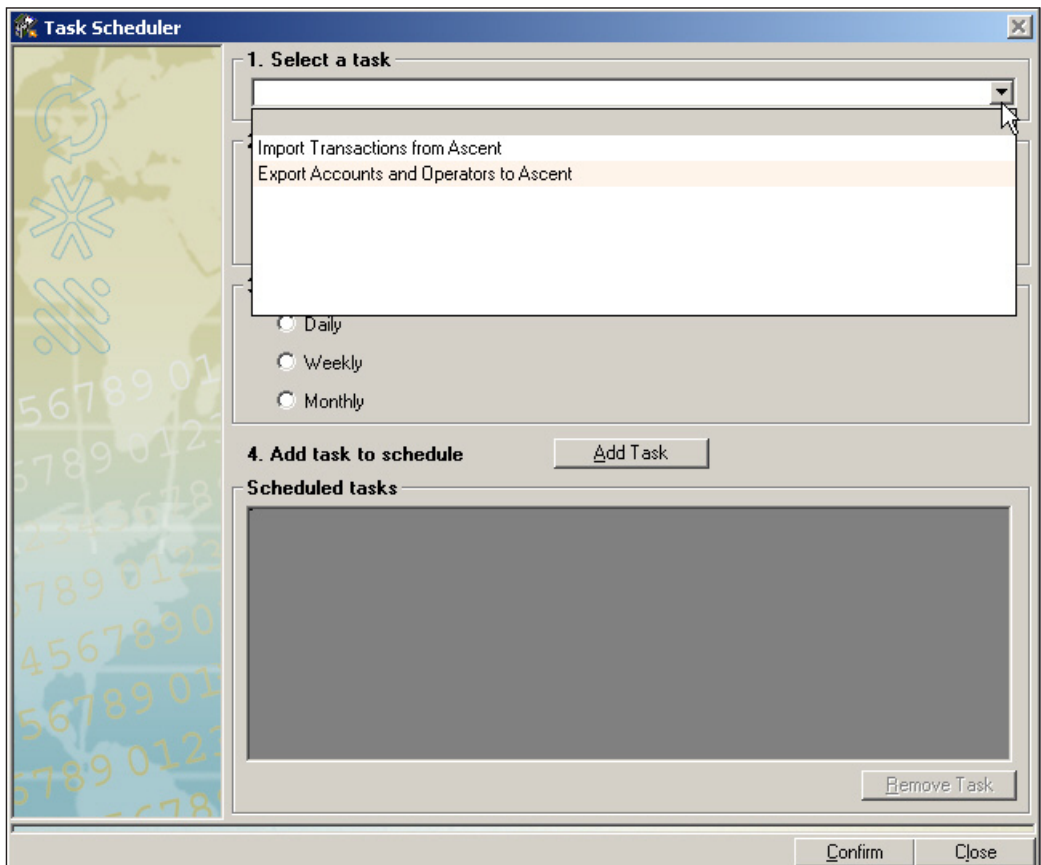
4. Click on the **Browse** button next to the "Import Directory" field and browse to the directory that contains the Ascent® ato transaction file.

5. In the "Select repetitions" section, click on the appropriate options button for daily, weekly or monthly.

6. Click in the time field and set the time of day you want the system to perform the operation.

7. Click on the **Add Task** button and the task appears in the "Scheduled tasks" list.
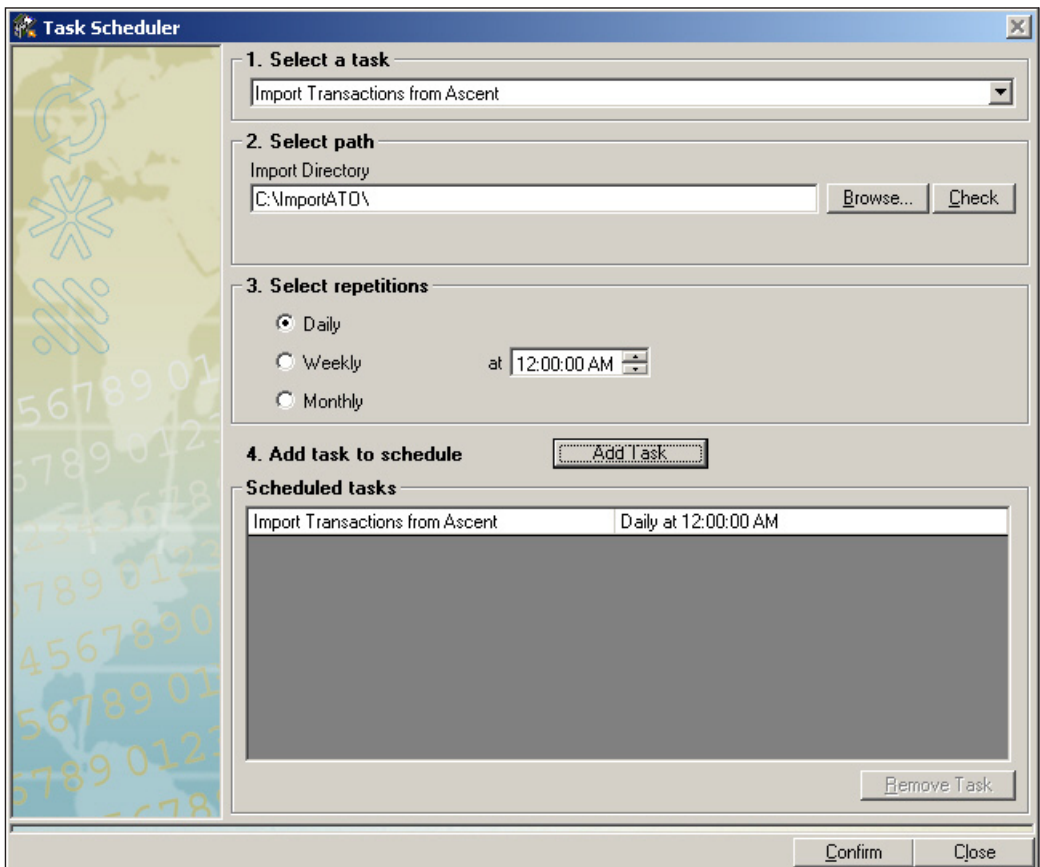
8. Click on the **Confirm** button at the bottom of the screen.

9. To export accounts click on the **Browse** button next to the "Accounts" field and browse to the directory where you want to save your exported accounts file.

10. Click **Open** and verify that the name **Acntexp** appears in the "File name" field and click **Save**.

11. To export operators click on the **Browse** button next to the "Operators" field and browse to the directory where you want to save your exported operator file.

12. Click **Open** and verify that the name **Userexp** appears in the "File name" field and click **Save**.

13. In the "Select repetitions" section, click on the appropriate options button for daily, weekly or monthly.

14. Click in the time field and set the time of day you want the system to perform the operation.

15. Click on the **Add Task** button and the task appears in the "Scheduled tasks" list.
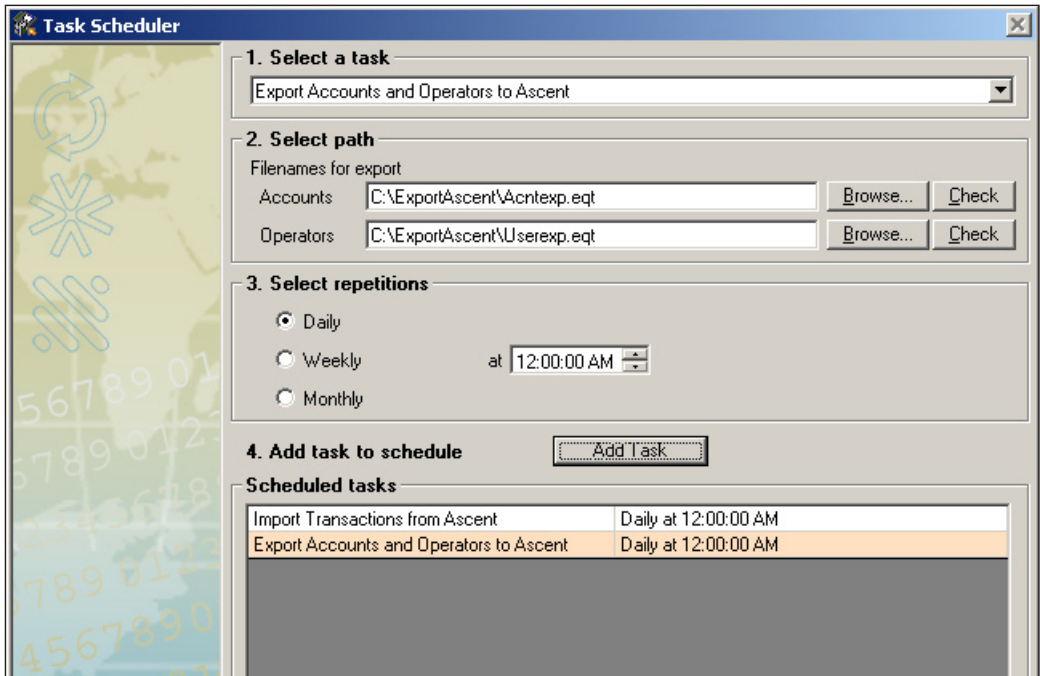
16. Click on the **Confirm** button at the bottom of the screen.

Chapter 13 - Using Business Manager Utilities

Backing Up Your Data

You backup and restore your Business Manager databases at the Business Manager Host PC using the Administration module. You must be a manager to perform this operation.

1. Business Manager uses a default backup directory on the master Host PC. It is recommended that you use this default directory. You can, however, use Windows® Explorer to create a different backup directory.

2. Select **Parameters | Configuration | Environment | Software**. You are prompted to enter your password.

3. Once you enter password and click **Confirm** the *Software* screen appears. Click on the **Database** tab to display the main databases for Business Manager.

4. Click on the **Backup settings** button. In the *Database backup settings* screen, click on the check boxes for the databases you want to back up.

5. Enter the location of the backup directory in the **Backup folder** path. This is the directory you created in step 1.

    IMPORTANT: You must put the "\" after the name of the folder as shown in the Backup Folder field in the example screen on page 13-2.

6. Click on the **Check path** button and the system verifies that this is a valid path. Click **OK**.

7. Click on the **Confirm** button when done, then click **Confirm** once again to return to the main screen.

8. To run the backup, select **Utilities | Maintenance | Backup databases**. The *Database backup* screen opens.

9. Click on the **Backup databases** button to begin the back-up.

10. You can check the backup directory using Windows Explorer to verify that the backed up files are in the directory. If you backup all database files, you should files similar to the samples here:

HO_20041121144741.dmp
SV_20041121144741.dmp
TR_20041121144739.dmp
SH_20041121144739.dmp

The name after the underscore corresponds to the year, month, date, hour, minutes, seconds.

Scheduling Your Backups

To set up your system to automatically backup your data:

1. Business Manager uses a default backup directory on the master Host PC. It is recommended that you use this default directory. You can, however, use Windows® Explorer to create a different backup directory.

2. Select **Parameters | Configuration | Environment | Software**. You are prompted to enter your password.

3. Once you enter password and click **Confirm** the *Software* screen appears. Click on the **Database** tab to display the main databases for Business Manager.

4. Click on the **Backup settings** button. The *Database backup settings* screen appears.
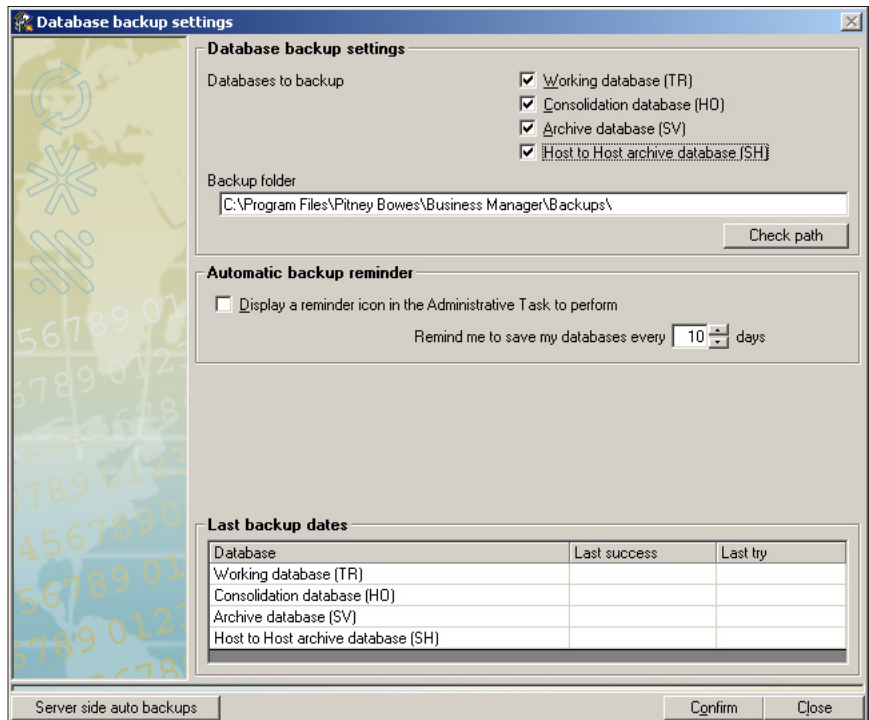
5. Click on the **Server side auto backups** button. The *Automatic database backup settings* screen opens.
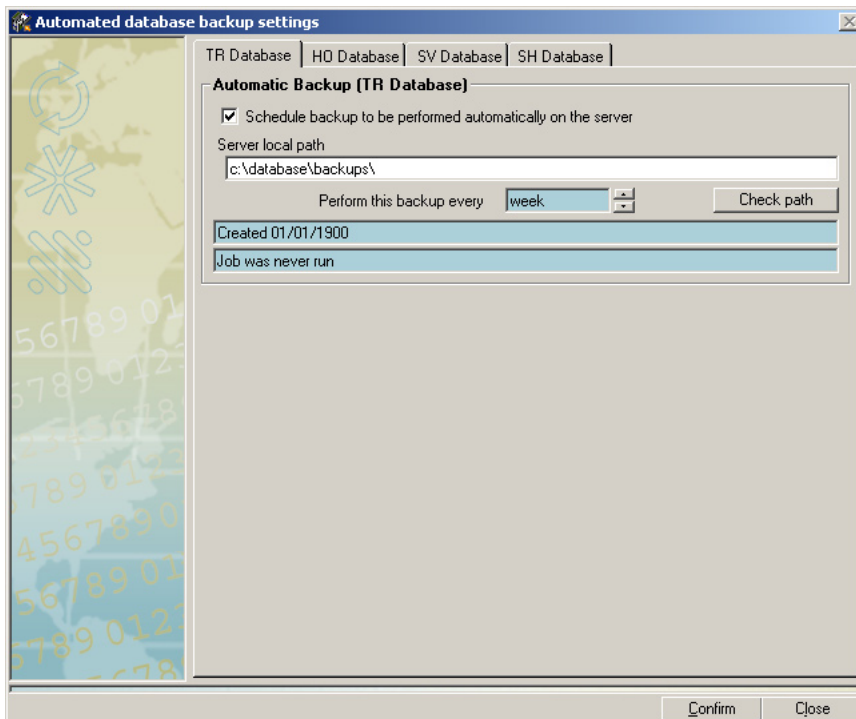
6. Click on the tab that corresponds with the database you want to schedule a backup for.

   NOTE: There are four tabs, one for each of the Business Manager databases.
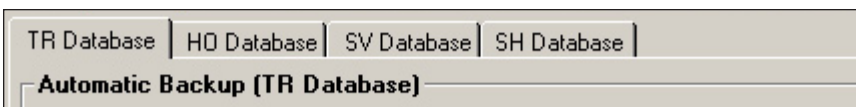
7. Click the check box in front of "Schedule backup to be performed automatically on the server".

8. Use the up and down arrow buttons next to the **Perform this backup every** field to select how often (week, day, month) you want to perform each backup.

   NOTE: The backup is performed automatically at midnight.

9. Repeat steps 6 through 8 for each of the remaining databases.

10. Click **Confirm** once you have finished scheduling backups.

11. Click **Confirm** then click **Confirm** once again to return to the main screen.

Restoring Your Data

Contact your Pitney Bowes® service representative to restore your backed up databases.

Appendix A - Setting the Accounting Period

Setting the Accounting Period	You can set the beginning and ending date for your major accounting period (typically yearly) and then define the following minor periods within the major period:

- Quarterly
- Monthly
- Per 4-week period
- Weekly

You set or modify the accounting period at the Business Manager master or local Host PC using the Administration module. You must be a manager to perform this operation.

1. To set or change the accounting period, select **Parameters | Configuration | Environment | Accounting period**. You are prompted to select the database.
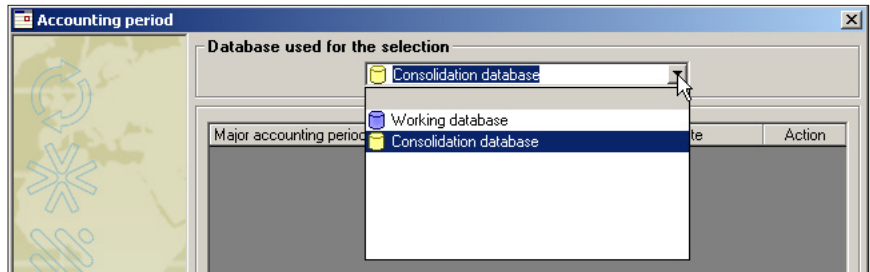
a. If this is an enterprise site with multiple hosts and this is the master host, select the **Consolidation** database. This allows you to generate reports on all of the consolidated local host databases

b. If you are also using this master host to collect transactions from local meters, mailing machines and DM Series™ Digital Mailing Systems, you also need to set a period for the Working database.

c. If this is a local host that is collect transactions from local meters, mailing machines and DM Series™ Digital Mailing Systems, select **Working** database.

2. Click on the [+] button at the bottom of the screen. Another *Accounting period* screen opens.

3. Define the name of the period, the dates, and the minor period.
4. Click on the **Confirm** button when finished.

Appendix B - Checking or Adding Software Licenses

Checking or Adding Software Licenses

You can view all of the software licenses installed on your Business Manager Host PC. These show the types of meters and mail processors you can use to process mail as well as any additional features you may have purchased with your system.

If for any reason your licenses are not activated you need to contact your Pitney Bowes® representative.

1. You view the licenses at the Business Manager Host PC using the Administration module. You must be a manager to perform this operation.

2. Select **Parameters | Configuration | Environment | See the installed licenses**. The *License information* screen opens.
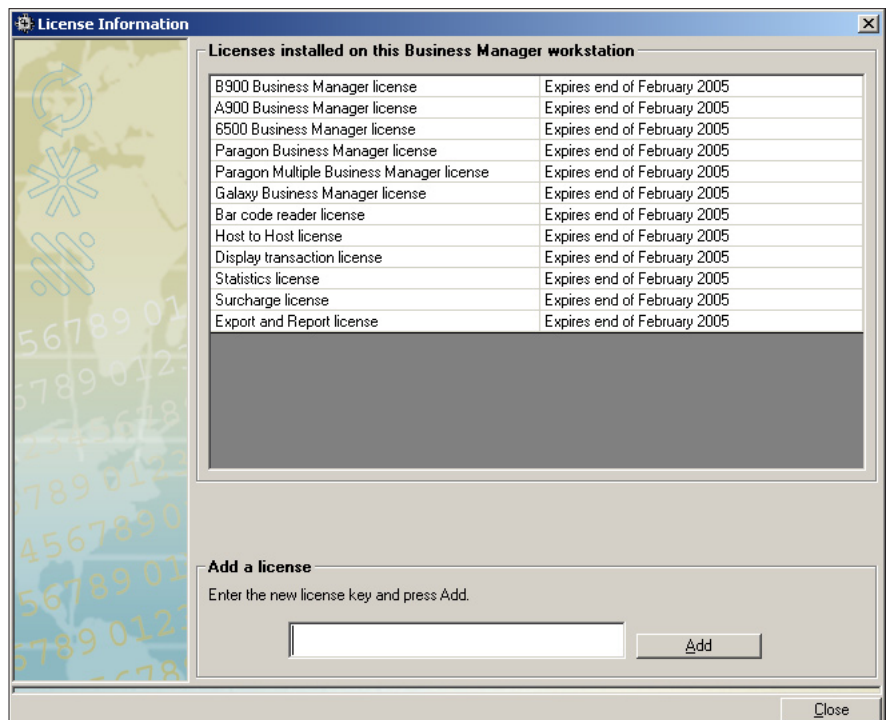
3. To add a new license, contact Pitney Bowes®. They will provide you with the code. Enter that code in the "Add a license" field and click **Add**.

Appendix C - Creating a Sample Custom Report

Sample Custom Report Overview

This section will take you through the steps necessary to create a *sample* Postage Charged report with the Custom Reports wizard. This section is only intended for use as an exercise to familiarize you with the custom report features.

NOTE: You must have set the accounting period, set up accounts and have run mail to perform this exercise.

The objective is to create a sample Postage Charged report that lists each account, sub account and sub-sub account by name, along with the total number of mail pieces and the total postage charged.

Review *Chapter 11, Custom Reports* in this guide to familiarize yourself with the Custom Reports wizard and the decisions you'll need to make to create the report.

Creating the Sample Custom Report

Selecting the Database

The first step in creating a custom report is to select the database.

1. Select **Reports | Reports**.

2. Click in the **Database selection** field in the main *Reports* screen and select **Working**.

    NOTE: Custom Reports only work with the Working database.
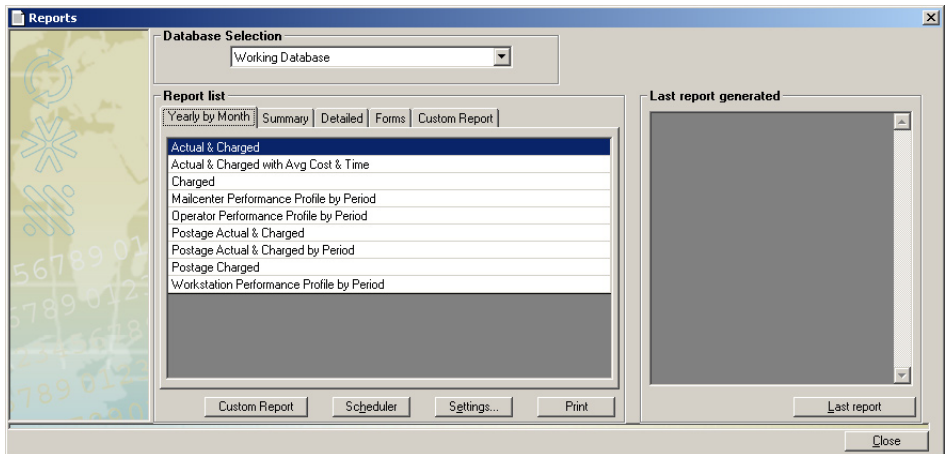
3. Click the **Custom Report** button and select **Add Report** button. The *Select Report Type* screen opens.

Selecting the Report Type

Follow the steps below to select the report type. The sample Postage Charged report is a summary report. The report will group similar information together, instead of creating a separate line for each individual transaction.

1. Select **Summary Report** by clicking the appropriate radio button.
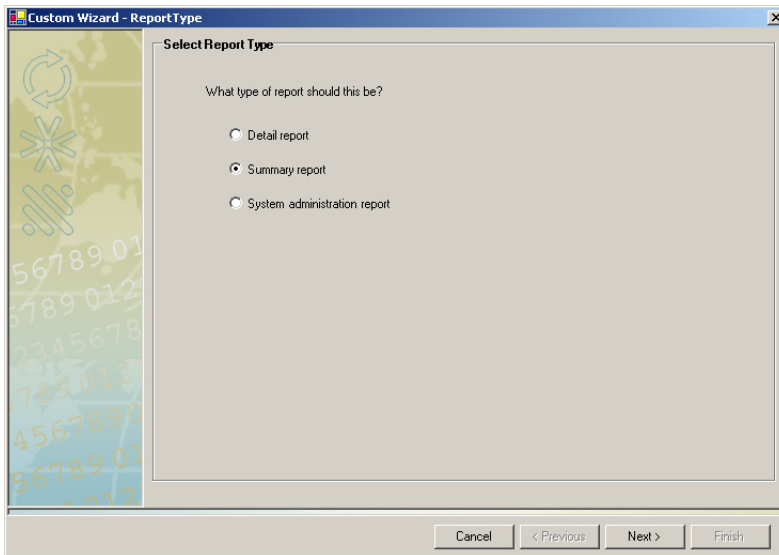
2. Click **Next >** to continue. The *Select Field* screen opens.

Selecting the Fields	Follow the steps below to select the fields of information that will appear in the sample Postage Charged report.
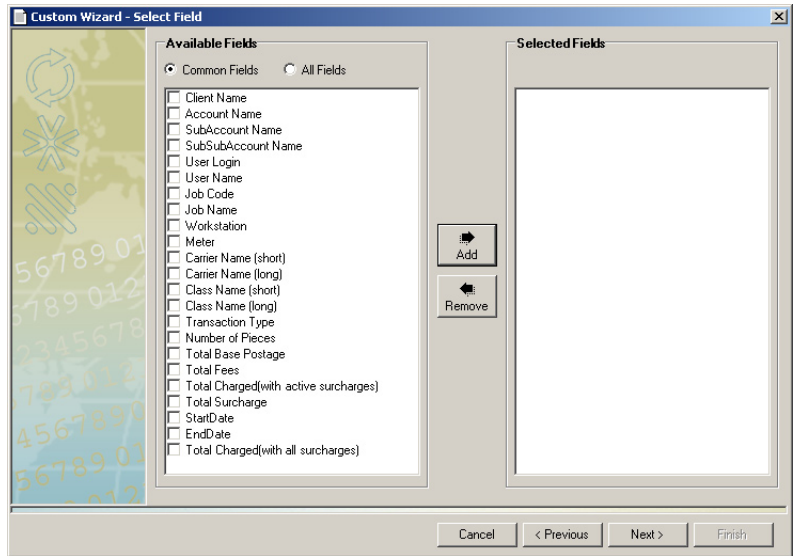
1. Select the following fields from the Available Fields list:

    •   Account Name

    •   Sub account Name

    •   Sub-sub account Name

    •   Number of Pieces

    •   Total Charged
        (with all surcharges)
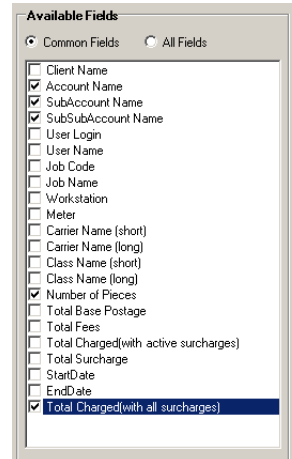
2. Click the **Add** button. The fields you selected will be moved from the Available Fields list to the Selected Fields list.

3. Click **Next >** once you have finished making your field selections. The *Select the Fields* to filter screen opens.
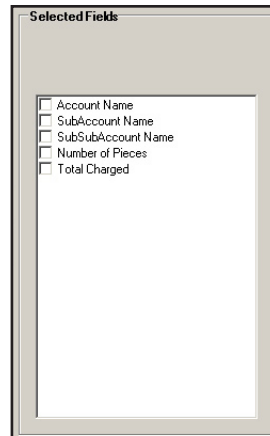
Selecting Filters

You do not need to select a filter for the sample Postage Charged report.
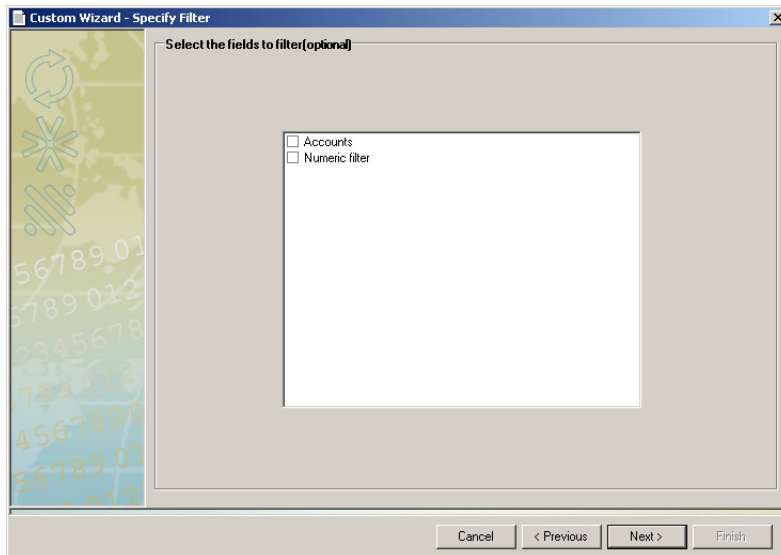
Click **Next >** to continue. The *Select a Date Range* screen opens.

Selecting the Date Range

For the purpose of this report, accept the default predefined period.

NOTE: The list of predefined periods are the accounting periods you have set up on your system. The default predefined period is the current accounting period.
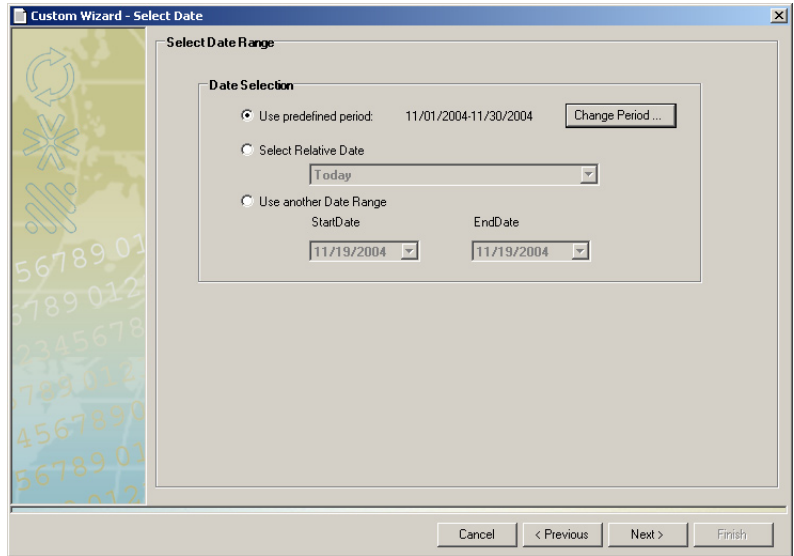
Click **Next >**. The *Select Report Options* window opens.

Selecting Report Options

Accept the default report option settings for the purpose of this sample report.
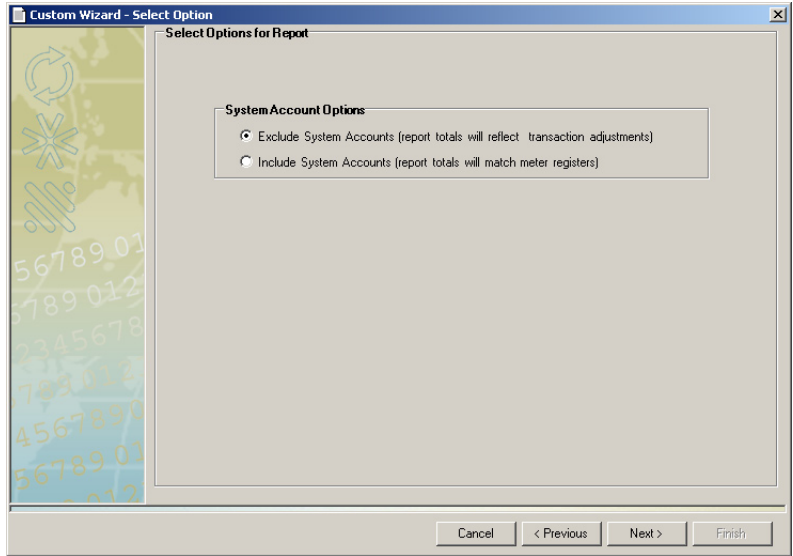
Click **Next >**. The *Specify Grouping and Sort Order* screen opens.

Selecting Grouping and Sort Order

For the purpose of this sample report you'll first group by account, then by sub account, then by sub-sub account.

1. Select **Account Name** from *First Group By...* the drop-down list.

2. Select **Sub account Name** from the first *Then By* drop-down list.

3. Select **Subsubaccount Name** from the second *Then By* drop-down list.

4. Ensure the **Ascending sort order** radio button is selected for each group.

5. Click **Next >**. The *Report Layout* screen opens.

Formatting the Report

Follow the steps in this section to format the layout of the sample Postage Charged report.

NOTE: You can click the **Preview** button at any to view what the report output will look like.
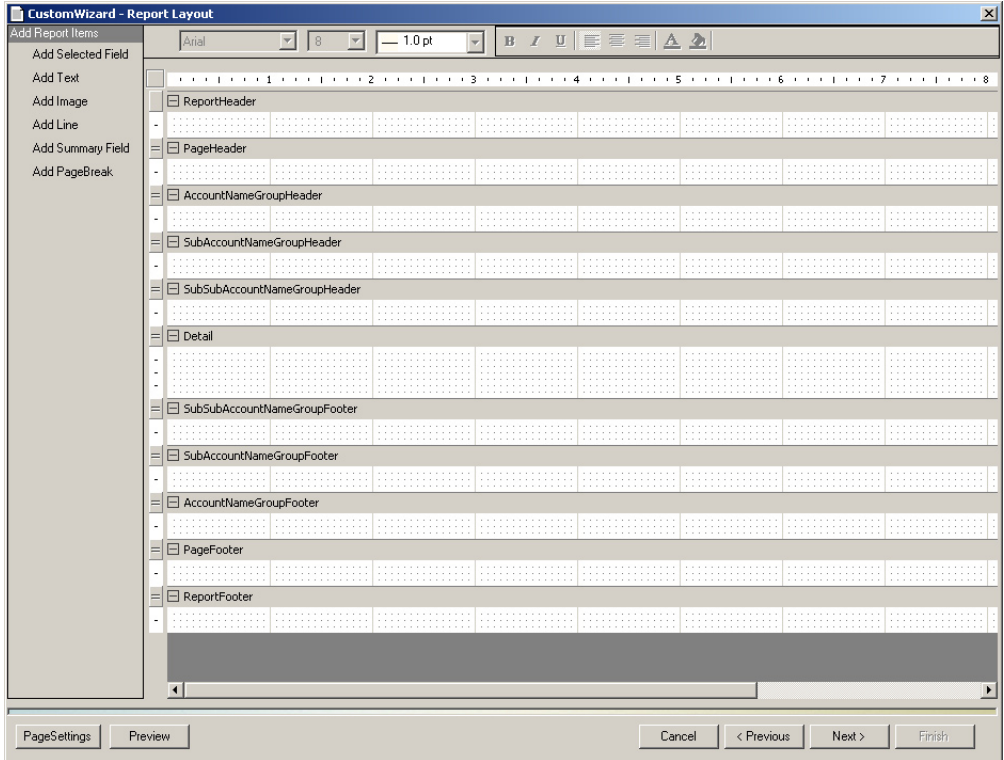
The Sub account and Sub-sub account Name Group Header and Footer Rows
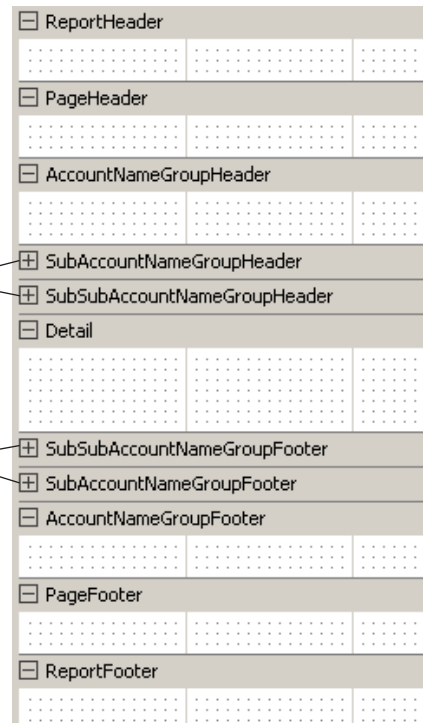
For the purpose of this report, you will not need to use the Sub account and Sub-sub account Name Group Header and Footer rows.

1. Minimize the Sub account Name Group Header row by clicking the ▬ button.

2. Minimize the Sub-sub account Name Group Header row by clicking the ▬ button.

3. Minimize the Sub-sub account Name Group Footer row by clicking the ▬ button.

4. Minimize the Sub-sub account Name Group Footer row by clicking the ▬ button.

Your report layout should appear similar to the figure shown below.

Sub account and
Sub-sub account Name Group
Header rows minimized
("-" button becomes "+" button)

Sub account and
Sub-sub account Name Group
Footer rows minimized
("-" button becomes "+" button)

The Report Header Row

In this section, you will add text to the Report Header row. The text will appear once at the top of the first page of the sample Postage Charged report.

1. Resize the Report Header row by clicking and dragging the ⊟ button beneath the row downward.
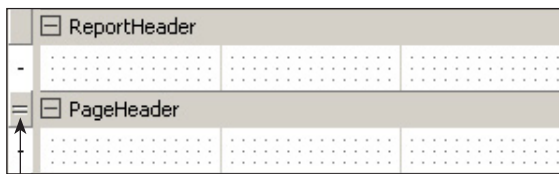
Click here and drag down to resize the Report Header row

2. Click **Add Text** to add labels and column headings to your report.

3. Click and drag in row where you want the text to appear. The *Add Text* dialog box appears.

4. Type **Sample Custom Report - Postage Charged** in the field provided.
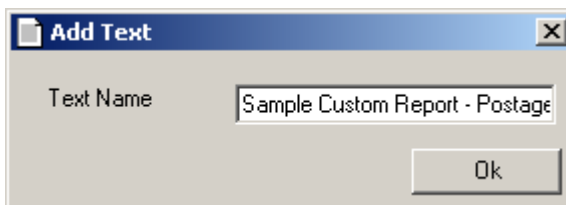
5. Click **Ok**. The text you typed will appear in Report Header row.

> **NOTE:** If necessary, you can adjust the size of the text box and reposition it within the row.

6. Select **18** from the font size drop-down list on the menu bar at the top of the screen.

7. Click the $\underline{A}$ button and select a font color for the text.

8. Click the **B** and *I* buttons to bold and italicize the text.

Your Report Header should appear similar to the figure shown below.

Font size drop-down list   Bold button   Italic button   Font color button

ReportHeader

Sample Custom Report - Postage Charged
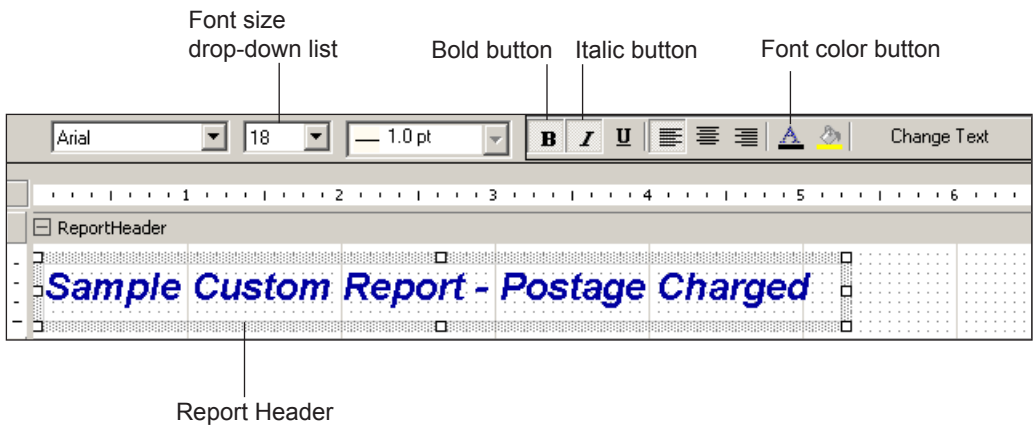
Report Header

The Page Header Row

In this section, you will add column headings to the Page Header row so they appear at the top of each page of the report. The sample Postage Charged report has three column headings: *Account Name*, *Total Pieces*, and *Total Charged*.

1. If necessary, resize the Page Header row by clicking and dragging the ⬌ button beneath the row downward.
2. Click the **Text** button.
3. Click and drag in the Page Header row where you want the text to appear. The *Add Text* dialog box appears.

📄 Add Text	✕
Text Name	
	Ok
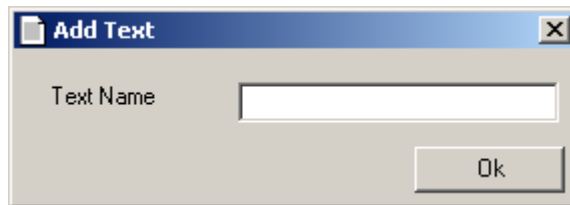
4. Type **Account Name** in the field provided.
5. Click **Ok**. The text you typed will appear in the Page Header row.
6. Click the **B** button to bold the text.
7. Repeat steps 2-6 to add the **Total Pieces** and **Total Charged** column headings to the report.

8. Click the **Line** button.

9. Click and drag below the text in the Page Header row to draw the line.

Your Page Header row should appear similar to the figure shown below.

NOTE: You can adjust the size of each text box and reposition within the row as necessary.

Page Header row

Column heading   Column heading   Column heading

The Account Group Name Header Row

In this section, you will add the Account Name field to the Account Group Name Header row to sort the report by account name.

1. If necessary, resize the Account Name Group Header row by clicking and dragging the ▭ button beneath the row downward.

2. Click the **Add Selected Fields** button.

3. Click and drag in the row where you want the field to appear. The *Add Selected Fields* dialog box appears.

4. Select **Account Name** from the drop-down list.

AddSelectedFields	✕
Select Field	Account Name ▼
	Ok
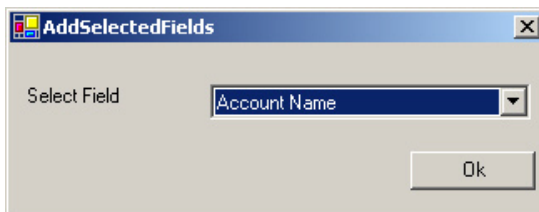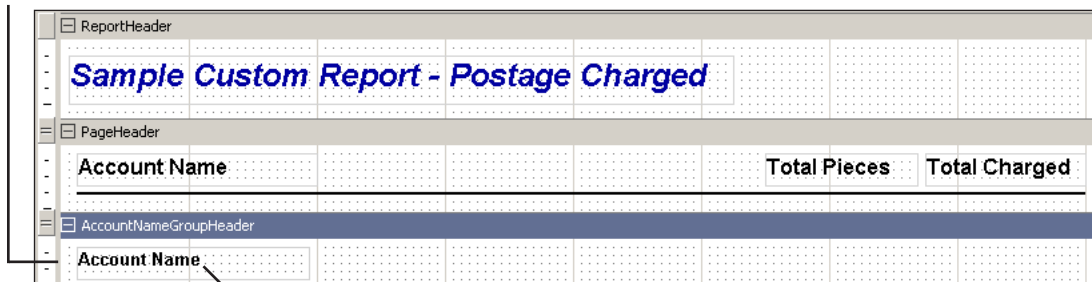
5. Click **Ok**. The name of the field will appear in the Account Name Group Header row.

6. Click the **B** button to bold the selected field.

Your Account Name Group Header row should appear similar to the figure shown below.

NOTE: You can adjust the size of each text box and reposition within the row as necessary.

Account Name Group Header row

⊟ ReportHeader
Sample Custom Report - Postage Charged
⊟ PageHeader
Account Name ... **Total Pieces** **Total Charged**
⊟ AccountNameGroupHeader
Account Name

Account name field

The Details Row

In this section, you will add text in the Details row will appear in the body of the report. For this sample report you will need to add the following fields to the Details row:

• Account Name,

• Sub account Name,

• Sub-sub account Name,

• Number of Pieces, and

• Total Charged.

1. If necessary, resize the account name group header row by clicking and dragging the ⚌ button beneath the row downward.

2. Click the **Add Selected Fields** button.

3. Click and drag in the row where you want the field to appear. The *Add Selected Fields* dialog box appears.
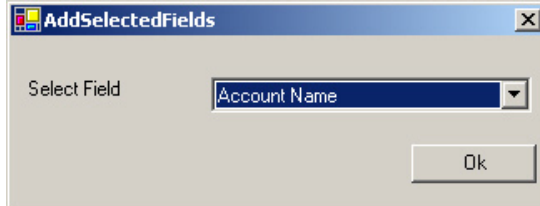
4. Select **Account Name** from the drop-down list.

5. Click **Ok**. The name of the field will appear in the account group header row.

6. Repeat steps 2-5 until the **Sub account Name**, **Sub-sub account Name**, **Number of Pieces**, and **Total Charged** fields have been added to the report.

Your Detail row should appear similar to the figure shown below.

NOTE: You can adjust the size of each text box and reposition within the row as necessary.

Details row

Account Name field

Sub account Name field

Sub-sub account Name field

Number of Pieces field

Total Charged (with all surcharges) field

The Account Name Group Footer Row

In this section, you will add summary fields that show the total number of pieces and total postage charged for each account to the Account Name Group Footer row.

1. If necessary, resize the account name group footer row by clicking and dragging the ⊟ button beneath the row downward.

2. Click the **Add Text** button.

3. Click and drag in the page header row where you want the text to appear. The *Add Text* dialog box appears.
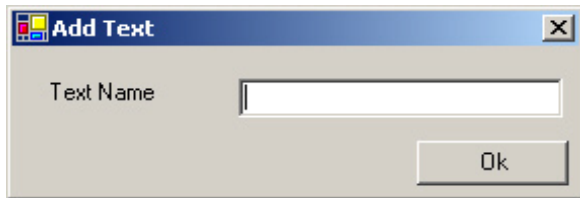
4. Type **Total** in the field provided.

5. Click **Ok**. The text you typed will appear in the Account Group Name Footer row.

6. Click the **B** button to bold the text.

7. Click the 🎨 ▾ button and select a color to highlight the text.

7. Click the **Add Summary Fields** button.

8. Click and drag in the row where you want the field to appear. The *Add Summary Fields* dialog box appears.

   a. Select **Number of Pieces** from the Field to be Summarized drop-down list.

   b. Select **Sum(SubTotal)** from the Type of Summary drop-down list.

   c. Select **Account Name** from the Summary Group drop-down list.
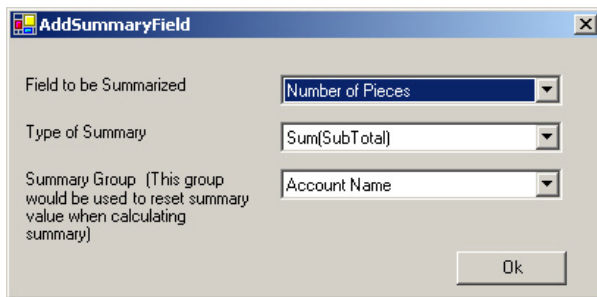
   d. Click **OK**.

   e. Click the **B** button to bold the summary field.

   f. Click the button and select a color to highlight the summary field.

9. Click and drag in the row where you want the field to appear. The *Add Summary Fields* dialog box appears.

   a. Select **Total Charged** from the Field to be Summarized drop-down list.

   b. Select **Sum(SubTotal)** from the Type of Summary drop-down list.

   c. Select **Account Name** from the Summary Group drop-down list.

   d. Click **OK**.

   e. Click the **B** button to bold the summary field.

   f. Click the ▨ ▾ button and select a color to highlight the summary field.

Your Account Name Group Header row should appear similar to the figure shown below.

NOTE: You can adjust the size of each text box and reposition within the row as necessary.

Account Name Group Footer row

Text describes information contained in summary fields

Number of Pieces summary field

Total Charged (with all surcharges) summary field

The Page Footer Row

In this section, you will add a footer to the Page Footer row..

1. If necessary, resize the Page Footer row by clicking and dragging the ▭ button beneath the row downward.

2. Click the **Add Text** button.

3. Click and drag in the Page Footer row where you want the text to appear. The *Add Text* dialog box appears.

Add Text	
Text Name	
	Ok
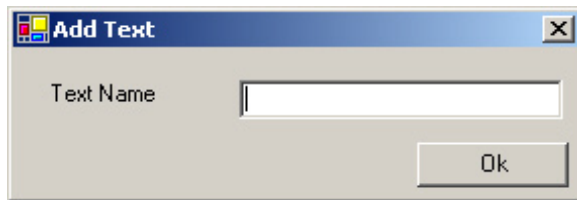
4. Type **Business Manager - Sample Custom Report** in the field provided.

5. Click **Ok**. The text you typed will appear in the Page Footer row.

6. Click the ▲ button and select a font color for the text.

7. Click the **Line** button.

8. Click and drag above the text in the Page Footer row to draw the line.

Your Page Footer row should appear similar to the figure shown below.

NOTE: You can adjust the size of each text box and reposition within the row as necessary.

Page Footer row

Page Footer text

Line separates text in Page Footer from subtotals in Account Name Group Footer

The Report Footer Row

In this section, you will add text to the Report Footer row. The text will appear once at the end of the sample Postage Charged report.

1. Resize the Report Footer row by clicking and dragging the ⬜ button beneath the row downward.

2. Click **Add Text**.

3. Click and drag in row where you want the text to appear. The *Add Text* dialog box appears.
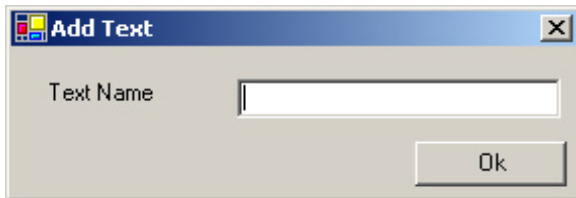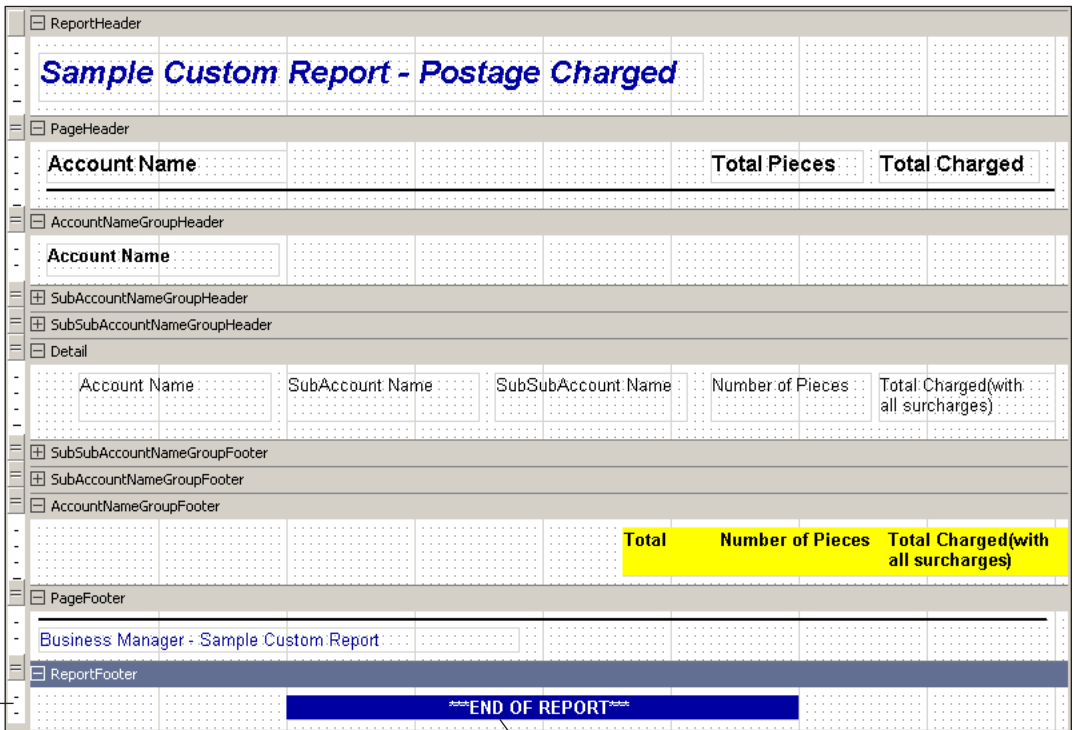
4. Type *****End of Report***** the field provided.

5. Click **Ok**. The text you typed will appear in Report Footer row.

6. Click the ☰ button to center the text.

6. Click the ![A] button and select a font color for the text.
7. Click the ![B] to bold the text.
8. Click the ![highlight] button and select a color to highlight the summary field.

Your Report Footer should appear similar to the figure shown below.

Report Footer row

Report Footer text (bold and highlighted)

Previewing the Report

Once you have finished formatting the sample Postage Charged Report layout, click the **Preview** button. A preview of the report will appear in a separate screen.

Your report should appear similar to the figure shown below.

Sample Custom Report - Page 1

Sample Custom Report - Page 2

Click the **Close** button once you have finished previewing the report.

Naming, Printing, and Saving the Report

Once you have finished previewing the sample Postage Charged Report, click **Next >** button. The *Report Name* screen opens.

1. Click in the **Enter Report Name** field.

2. Type in **Sample Custom Report - Postage Charged** as the report name.
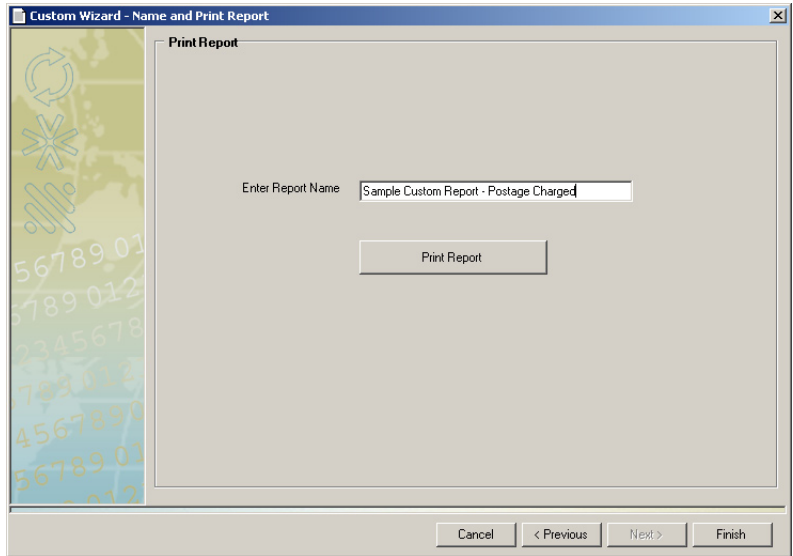
2. If necessary, click the **Print Report** button to print the re-
   port.

3. Click **Finish** to save the report. The *Custom Report Wizard*
   will close.

The *Reports* screen will open. The name of the report you cre-
ated will appear in the list on the Custom Report tab.

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Symbols

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