



Shipping & Mailing  
Postage Meters

# Connect+® Series, SendPro® P

Mailing & Shipping Systems

SendPro P 1000-3000

Connect+ Series 500W-3000

## User Guide

Canada English Edition  
SV62589-enca Rev. P  
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# 1 - Safety

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## Safety information



### Warning:

Follow normal safety precautions for all office equipment.

**Read all instructions before you attempt to operate the machine. Use the equipment only for its intended purpose.**

- Use only Pitney Bowes approved supplies, in particular aerosol dusters. Improper storage and use of aerosol dusters or flammable aerosol dusters, can cause an explosive-like condition that could result in a personal injury and/or property damage. Never use aerosol dusters labeled flammable and always read instructions and safety precautions on the duster container label.
- To obtain Pitney Bowes supplies, please contact our Supply Line™ to place orders. Material Safety Data Sheets can be obtained on the web or from our Supply Line™.
- Use the power cord supplied with the machine and plug it into a properly grounded wall outlet located near the machine and easily accessible. Failure to properly ground the machine can result in severe personal injury and/or fire.
- The wall outlet supplying power to the machine must be a single dedicated wall outlet. Contact a licensed electrician to ensure there are no other wall outlets on the branch circuit.
- The electrical circuit (mains) supplying power to the outlet must be switched ON.
- Avoid touching moving parts or materials while the machine is in use. Keep hands, loose clothing, jewelry and long hair away from all moving parts.
- Do not remove covers or defeat safety interlock switches. Covers enclose hazardous parts that should only be accessed by properly trained service personnel. Immediately report to Pitney Bowes Service any damaged or non-functioning components that renders the unit unsafe.
- Place the unit in an accessible location to allow for proper venting of the equipment and to facilitate servicing.
- The power cord wall plug is the primary means of disconnecting the machine from the AC supply.
- Do not use an adapter plug on the line cord or wall outlet.
- Do not remove the ground pin from the line cord.
- Avoid using wall outlets that are controlled by wall switches, or shared with other equipment.
- Do not route the power cord over sharp edges or trapped between furniture.

- Ensure there is no strain on the power cord where it becomes jammed between the equipment, walls or furniture.
- Do not plug headphones into the Line Out jack (Lime Green).
- Be certain the area in front of the wall receptacle into which the machine is plugged is free from obstruction.
- Before clearing a stoppage, be sure machine mechanisms come to a stop.
- When clearing a stoppage, avoid using too much force to protect against minor personal injury and damaging equipment.
- To prevent overheating, do not cover the vent openings.
- Operation of this equipment without periodic maintenance will inhibit optimum operating performance and could cause the equipment to malfunction. Contact your Pitney Bowes Customer Service Representative for required service schedule.
- Read all instructions before attempting to operate the equipment.
- Use this equipment only for its intended purpose.
- The system contains a module (PSD) that contains a coin cell battery, which is not replaceable. Do not dispose of module in a fire or hot oven. Do not crush or cut module. Do not store module in extreme hi or low temperatures, or extreme low pressure environments.



**Caution:**

Moving mechanism can result in personal injury. Keep hands, long hair, ties, jewelry and loose clothing away from moving parts.



**Caution:**

In case of an ink spill, leaking ink or excessive ink accumulation, immediately disconnect the power cord from the wall plug and contact Pitney Bowes.

In Canada, English speaking Customer Service Representatives are available 8:00 AM - 8:00 PM EST. French speaking representatives are available 8:00 AM - 5:00 PM EST.

Contact information can also be found at [pitneybowes.com/ca](https://pitneybowes.com/ca)

**Note:**

Always follow the specific occupational safety and health standards for your workplace.

**Caution:**

Changes or modifications to this equipment not expressly approved by the party responsible for compliance could void the user's authority to operate the equipment.

Except for Ethernet/LAN connection cables, shielded I/O and USB cables must be used with this equipment to ensure compliance with the limits. Use of unshielded cables is prohibited.

## Canada

This Class A digital apparatus complies with Canadian ICES-003.



**Warning:**

This is a Class A product. In a domestic environment this product may cause radio interference in which case the user may be required to take adequate measures.

## Responsible Party within Canada:

Pitney Bowes  
5500 Explorer Drive  
Mississauga, ON L4W 5C7  
Contact information can also be found at [www.pitneybowes.com/ca](http://www.pitneybowes.com/ca)

## Servicing

This product is serviceable. **Outside the USA** Contact information can also be found at [pitneybowes.com/ca](http://pitneybowes.com/ca)

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# 2 - Getting started

## In this section

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## What does this machine do?

The Connect+ Series, SendPro P is a digital envelope and mailing and shipping system that allows you to create custom designed content from a PC and download that content directly into a Ad/Graphic library stored on the system for use on mail runs. You can now design an outer envelope with content that reinforces the internal message. You can add marketing, advertising, and other promotional messages to your mailpieces.

The Connect+ Series, SendPro P provides a unique and easy-to-use touch screen interface where you can access all of your applications from the home screen. Each application (Mailing, Shipping, Receiving etc.) appears as a tile on the Home screen. Simply select the button within the appropriate tile to run the application.

The system also provides a full range of mail system functions including:

- Printing postage on envelopes
- Printing postage on tapes (labels)
- Sealing envelopes
- Calculating postage based on item weight and size and class of mail.

## What the system can measure

The system uses the Weigh-On-The-Way® (WOW®) module to process mail of varying thickness and size to determine the postage amount based on the weight and dimensions of each mailpiece. Systems with WEIGH-ON-THE-WAY® (W-O-W®) Rating use WEIGH-ON-THE-WAY® for Lettermail.

## What the system cannot measure

If your system does not have Weigh-On-The-Way® (WOW®) but has an attached scale, you can measure only the weight of the mailpiece. The postage amount will be based on the class specified for the job you are running.

For more information refer to Run a Job with an Attached Scale.

## WEIGH-ON-THE-WAY® (W-O-W®)

The Weigh-On-The-Way® (WOW®) module processes mixed mail (mail of varying sizes and weights) and determines the postage amount based on the weight and dimensions of each envelope.

## Canada Post Requirements

Since your postage meter (Postal Security Device) is licensed by Canada Post, you must follow a few basic requirements.

- Mail must have the correct date and postage amount in the postage indicium.
- Metered mail must bear the Postal Code location of the post office where the postage meter (Postal Security Device) is registered.
- If you move to another Postal Code location, you must update the Postal Code. You can do this by calling PB Postage at 1-800-672-6937.
- Each time you refill your postage meter (Postal Security Device) through the LAN, the PB Postage Meter Payment System computer automatically performs a postal inspection. If the postage meter in your mailing machine has not detected a refill transaction at certain intervals, the message “Inspection Required” appears on the Run Mail screen and then prompts you to connect to Pitney Bowes and perform an inspection.
- The postage tape you use must meet Canada Post specifications.

## Postal Security Device

The postage meter on your mailing system is a Postal Security Device (PSD) that incorporates the latest technology approved by Canada Post to secure funds. This technology eliminates the need to perform physical inspections thereby making the system easier and more convenient to use.

## Logging in and out of the system

If users are enabled on your system, you will be required to enter a password to log on to the system. This prevents unauthorized use of the system.

To log in:

1. Select the appropriate username.
2. Enter your password and select **OK**.

To log out:

1. Select the settings icon in the lower right corner of the Home screen.



2. Select **Sign out**.
3. Select **OK**.

## The Home screen

The Home screen is the first screen displayed when you log onto the system. It contains all of the application tiles you need to start any of the system applications including Run Mail, Print Shipping Label and Tools.

You can select the various functions within an application tile by pressing the appropriate button. For example, to start running mail, press the **Run Mail** button within the Mailing tile.

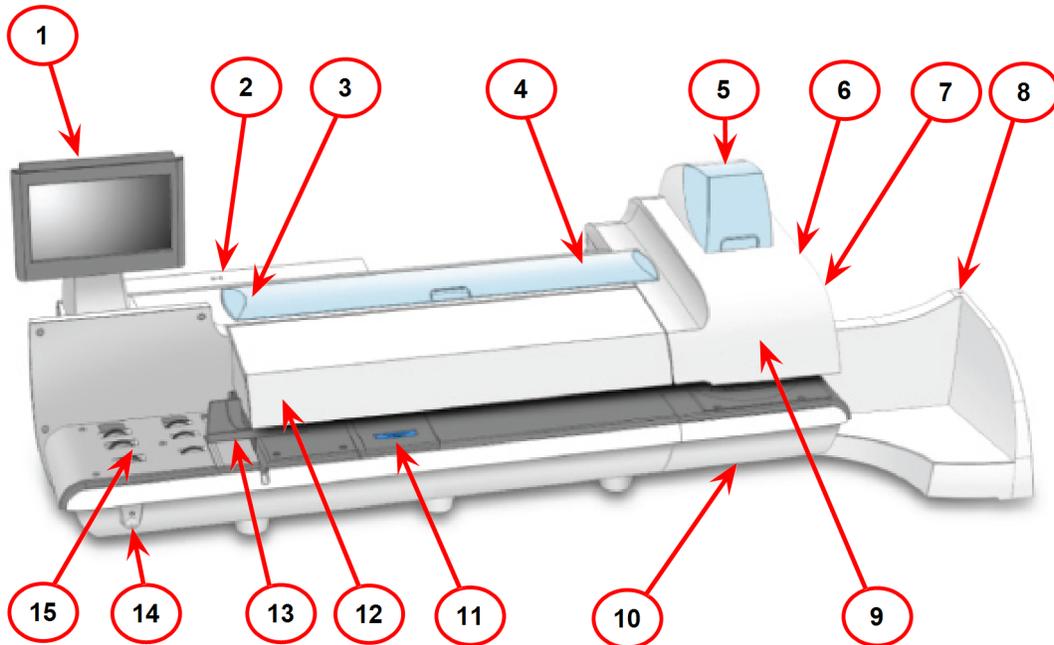
## Tools

The Tools tile also provides buttons for direct links to web sites providing additional resources and support for your mailing operation:

- **Verify Address** - Enter any delivery address to verify accurate Postal data, including spelling or accurate ZIP Codes. Provide reason codes for non-matches. Print shipping labels in standard USPS 4"x 6" format on bottom half of 8.5" x 11" sheet.
- **Your Account**- Provides unlimited access to your account at pitneybowes.com. You can place a service call, check order status (product or service call), access service chat, and access supplies chat within the Pitney Bowes Store.
- **Buy Supplies**- Provides direct access to the Pitney Bowes Supply Line where you can purchase envelopes and paper, ink and toner, office products, and supplies for your Connect+ Series, SendPro P system.
- **Track a Package** - Track your Canada Post, Purolator, USPS, UPS, FedEx or DHL/Airborne packages. Print status directly. View map and detailed information for each carrier as information is available.
- **Postal Tools** - Track your Canada Post packages, look up delivery standards and learn more about postal classes and services such as Xpresspost, Priority Next A.M. or Addressed Admail.

- **pbSmart** - Connects you to the Pitney Bowes Canadian website. Learn how Pitney Bowes can help you improve and strengthen your business.

## Parts of the mailing and shipping system



1. The touchscreen allows you to communicate with the device and the built-in postage meter (Postal Security Device). Your device comes equipped with a 10.2" touchscreen. An optional 15" touchscreen is also available.
2. The Postal Security Device (PSD) contains the funds and performs all of the calculations necessary to print postage that comply with the latest Canada Post standards. It is located beneath the PSD cover on the back of the device.
3. The envelope sealant bottle contains the E-Z Seal® used for moistening envelopes. It is located under the main cover, on the left.
4. The device uses tape to print reports and postage for packages or pieces of mail that are outside the limits specified for mailing materials. Connect+ 500W, SendPro P1500, Connect+ 1000, SendPro P1000 and Connect+ 2000, SendPro P2000 systems use adhesive tape only. Connect+ 3000, SendPro P3000 systems can use either adhesive or gummed tape. The tape is located under the supplies cover, on the right.

5. The ink cartridges contain the ink used to print postage, as well as any additional items (graphic ad, text message, return address, etc.) you want to appear on your mailpiece.
6. The tape sealant bottle is an optional feature for Connect+ 3000, SendPro P3000 devices. It contains the E-Z Seal® used for moistening gummed tape. The tape sealant bottle is located to the right of the printer module, behind the stacker.
7. The wet/dry tape lever is an optional feature for Connect+ 3000, SendPro P3000 devices. Use this lever to set the type of tape you are using on your system. The wet/dry tape lever is located to the right of the printer module, behind the stacker.



Push the lever to the right for dry tapes or pressure-sensitive tapes.

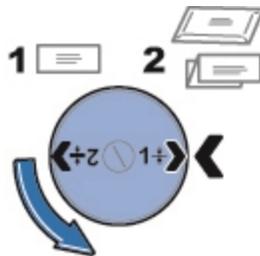


Push the lever to the left for wetting gummed tapes.

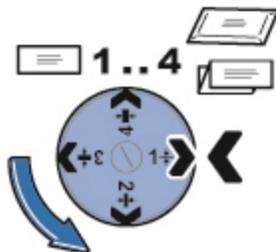
8. The stacker is where mail is deposited after the postage is applied to the piece of mail. It is located on the right side of the system. The drop stacker shown here is available with every device. An optional power stacker is also available.
9. The print heads produce the printed postage.
10. Ink is deposited in the waste ink tray during the print head cleaning process. The device will alert you when the waste tray is nearing full capacity.
11. The moistener pad assembly moistens the flaps on the envelope. The moistener pad assembly is located beneath the moistener deck on Connect+ 3000, SendPro P3000 devices. To access it, lift the top release lever and then use the blue notch to pull on and open the moistener deck.

12. The thickness adjustment knob is located beneath the feeder cover. Turn this knob to adjust for the thickness of the envelopes. To set, turn the knob until the arrow on the knob lines up with the arrow to the right as shown below. The arrow on the knob snaps into position.

- Connect+ 500W, SendPro P1500, Connect+ 1000, SendPro P1000 and Connect+ 2000, SendPro P2000 devices:
  - **Setting 1:** Use this setting for postcards mailpieces that are 0.007 inches (0.18 mm) to 0.375 inches (9.52 mm) thick
  - **Setting 2:** Use this setting for mailpieces that are greater than 0.375 inches (9.52 mm) to the maximum of 0.625 inches (15.9 mm) thick



- Connect+ 3000, SendPro P3000 devices:
  - **Setting 1:** Use this setting for postcards and mailpieces that are less than 0.25 inches (6.35 mm) thick
  - **Setting 2:** Use this setting for mailpieces that are greater than or equal 0.25 inches (6.35 mm) thick, but less than 0.50 inches (12.7 mm) thick
  - **Setting 3:** Use this setting for mailpieces that are greater than or equal to 0.50 inches (12.7 mm) thick, but less than 0.625 inches (15.9 mm) thick
  - **Setting 4:** Use this setting for mailpieces that are greater than or equal to 0.625 inches (15.9 mm) thick, but less than 0.748 inches (19 mm) thick



13. The moveable side guide at the front of the feed deck is used to stabilize the envelope position when feeding it. Note that the side guide is optional feature on Connect+ 3000, SendPro P3000 devices.
14. The power button turns the device on and off. This is located on the lower left side of the feed deck.

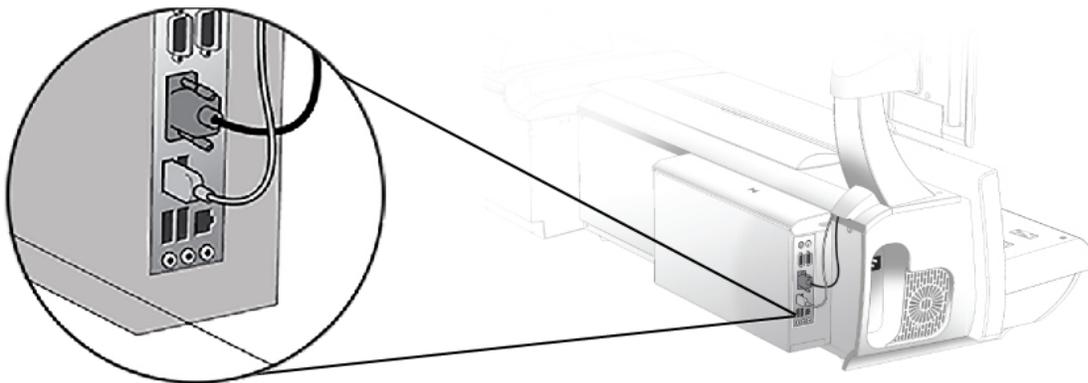
15. The feed deck is the area where you load the envelopes. If you have a Connect+ 500W, SendPro P1500, Connect+ 2000, SendPro P2000 or Connect+ 3000, SendPro P3000 system, this feeds the envelopes to the WEIGH-ON-THE-WAY® (W-O-W®) transport deck.

### Attached scale

If your device has WEIGH-ON-THE-WAY® (W-O-W®) (Connect+ 500W, SendPro P1500, Connect+ 2000, SendPro P2000, Connect+ 3000, SendPro P3000), the attached scale is used to weigh mailpieces that do not fit through the mailing system. If your device does not have WEIGH-ON-THE-WAY® (W-O-W®) (Connect+ 1000, SendPro P1000), the attached scale is used to weigh all mailpieces, regardless of whether they fit through the device or not. The attached scale is behind the supplies cover and to the right of the PSD cover.

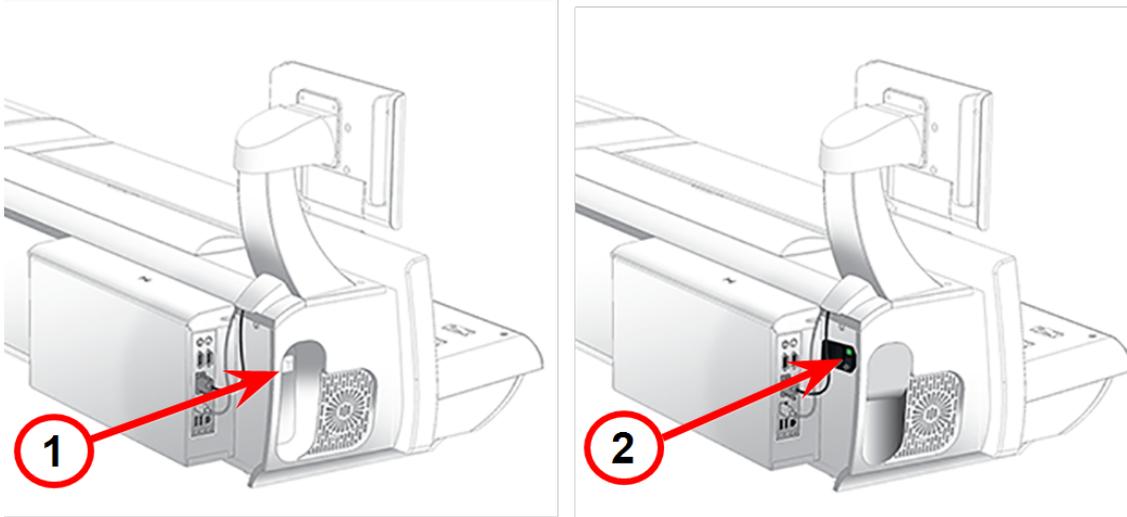
### USB and LAN ports

Two USB ports and the LAN port are located on the back, lower left side of the system. The USB ports provide communications with external devices like a printer or an attached scale. The LAN port provides the mailing system with a high bandwidth internet connection.



### Power receptacle

The power receptacle is located either on the back or the left side of the system. It connects to the AC power cord (supplied).



1. Old power receptacle
2. New power receptacle

On newer models, a power switch is fitted. A green light illuminates when the switch is in the on position. If the green light does not illuminate, please contact service personnel for support.

## Manual adjustments

You may need to make the following manual adjustments before you run a job.

For all systems:

- Set the Thickness Adjustment Knob

For optional features:

- Adjust the Side Guide
- Set the Wet/Dry Sealer Lever
- Adjust the Drop Stacker

You can pivot the touchscreen display to a convenient position simply by grasping it and moving it up, down, left or right. If the touchscreen does not respond when you touch it, you can also calibrate the touchscreen.

## Shutting down your system

Follow this process to shut your machine down correctly.

1. Select the settings icon in the lower right corner of the Home screen.



2. Select the **Shut Down** option twice.
3. Wait until all messages clear from the screen.

## System specifications

*System Dimensions and Weights*

*Power and Compliance*

*Operating Conditions*

*Capacities, Features, and Throughput*

*Peripheral Options*

System Dimensions and Weights	
<p>Connect+® 1000, SendPro® P1000</p>	<p><b>Length:</b> 37.5" (953 mm)</p> <ul style="list-style-type: none"> <li>• With drop stacker fully extended, add 17.5" (394 mm)</li> <li>• With optional power stacker fully extended, add 47.5" (1207 mm)</li> <li>• With optional colour printer, add 7.25" (184 mm)</li> </ul> <p><b>Depth:</b> Printer cover open: 23.5" (597 mm)</p> <ul style="list-style-type: none"> <li>• With optional colour printer, add 1" (25.4 mm)</li> </ul> <p><b>Height:</b> 24" (610 mm)</p> <ul style="list-style-type: none"> <li>• With optional 15" colour monitor, add 2" (51 mm)</li> </ul> <p><b>Weight:</b> 110 lbs. (50 kg)</p>
<p>Connect+® 500W, SendPro® P1500 Connect+® 2000, SendPro® P2000</p>	<p><b>Length:</b> 52.5" (1334 mm)</p> <ul style="list-style-type: none"> <li>• With drop stacker fully extended, add 17.5" (394 mm)</li> <li>• With optional power stacker fully extended, add 47.5" (1207 mm)*</li> <li>• With optional colour printer, add 7.25" (184 mm)</li> </ul> <p><b>Depth:</b> Printer cover open: 23.5" (597 mm)</p> <ul style="list-style-type: none"> <li>• With optional colour printer, add 1" (25.4 mm)</li> </ul> <p><b>Height:</b> 24" (610 mm)</p> <ul style="list-style-type: none"> <li>• With optional 15" colour monitor, add 2" (51 mm)</li> </ul> <p><b>Weight:</b> 150 lbs. (68 kg)</p> <p>*Power stacker not available with Connect+® 500W, SendPro® P1500</p>

System Dimensions and Weights	
Connect+® 3000, SendPro® P3000	<p><b>Length:</b> 61" (1549 mm)</p> <ul style="list-style-type: none"> <li>• With drop stacker fully extended, add 17.5" (394 mm)</li> <li>• With optional power stacker fully extended, add 47.5" (1207 mm)</li> <li>• With optional colour printer, add 7.25" (184 mm)</li> <li>• With optional colour printer with tape moistener, add 11.5" (292 mm)</li> </ul> <p><b>Depth:</b> Printer cover open: 23.5" (597 mm)</p> <ul style="list-style-type: none"> <li>• With optional colour printer, add 1" (25.4 mm)</li> </ul> <p><b>Height:</b> 24" (610 mm)</p> <ul style="list-style-type: none"> <li>• With optional 15" colour monitor, add 2" (51 mm)</li> </ul> <p><b>Weight:</b> 165lbs. (75 kg)</p>

Power and Compliance	
Power	100-240Vac, 50/60Hz., 6.4 - 3.0 Amps
Compliance	<p>Optional ENERGY STAR®</p> <p>Refer to How to Set System Timeouts for information about the optional ENERGY STAR sleep mode.</p>

Operating Conditions	
Operating Temperature	Maximum Room Ambient 40° C (104 F)

Capacities, Features, and Throughput	
colour Touch Screen Display	<ul style="list-style-type: none"> <li>• 10.2" Standard</li> <li>• 15" Optional</li> </ul>

Capacities, Features, and Throughput	
Feeder Type	<p>Connect+® 1000, SendPro® P1000: Non W-O-W® (MSF1) Feeder</p> <p>Connect+® 2000, SendPro® P2000: W-O-W® (MSF2) feeder</p> <p>Connect+® 3000, SendPro® P3000: Optional W-O-W® (MSF3) feeder</p>
Feeder Deck	<ul style="list-style-type: none"> <li>• Connect+® 1000, SendPro® P1000 and Connect+® 2000, SendPro® P2000: Standard - Letter Mail and Flats</li> <li>• Connect+® 3000, SendPro® P3000: Extra Wide Feed Deck, Letter Mail and Flats</li> </ul>
Sealer Capacity	Approximately 3900 #10 single-insert mailpieces
Sealer Type	Pump-fed pad with sealing rollers
Printer	<p>High speed dual-printing technology, at 1200 DPI (vertical)</p> <ul style="list-style-type: none"> <li>• Mono Printer Module – prints both Postal Red and Black.</li> <li>• colour Printer Module – prints both Postal Red, Process colour, and Black.</li> </ul>
Print Head Life	800,000 cycles for full IBI Indicia
Ink Capacity (in full size USPS IBI-C indicia)	<ul style="list-style-type: none"> <li>• Small cartridge: 8K mailpieces</li> <li>• Medium cartridge: 18K mailpieces</li> <li>• Large cartridge: 45K mailpieces</li> </ul>
Ink Cartridge Life	<ul style="list-style-type: none"> <li>• Shelf life: Maximum of 24 months from date of manufacture - for monochrome and color inks</li> <li>• In use life: Maximum of 30 months from date of manufacture - includes any time on shelf before first use for monochrome and colour inks</li> </ul>
Tape Method	<ul style="list-style-type: none"> <li>• Connect+® 500W, SendPro® P1500, Connect+® 1000, SendPro® P1000 and Connect+® 2000, SendPro® P2000: Adhesive Tape</li> <li>• Connect+® 3000, SendPro® P3000: Adhesive or Gummed Tape</li> </ul>
Tape	5" roll, approximately 600 indicias per roll, without graphic ads

Capacities, Features, and Throughput	
Throughput	<p>Range of speed options available.</p> <ul style="list-style-type: none"> <li>• Connect+® 500W, SendPro® P1500: 2-Speeds, 60 and 120 Letters/min</li> <li>• Connect+® 1000, SendPro® P1000 Non W-O-W®: 3-Speeds, 130 (Standard), 160, and 180 Letters/min</li> <li>• Connect+® 2000, SendPro® P2000: Non W-O-W®: 3-Speeds, 130 (Standard), 160, and 180 Letters/min</li> <li>• Connect+® 2000, SendPro® P2000: W-O-W®: 3-Speeds, 70 (Standard), 90, 110 Letters/min</li> <li>• Connect+® 3000, SendPro® P3000: Non W-O-W®: 4-Speed options, 160 (Standard), 210, 260, and 300 Letters/min</li> <li>• Connect+® 3000, SendPro® P3000: W-O-W®: 4-Speed options, 100 (Standard), 130, 160, and 200 Letters/min</li> </ul>
W-O-W® Weight Capacity	<p>Connect+® 1000, SendPro® P1000: NA</p> <p>Connect+® 500W, SendPro® P1500 and Connect+® 2000, SendPro® P2000: 16 ounce</p> <p>Connect+® 3000, SendPro® P3000: 32 ounce</p>
Stacking	<ul style="list-style-type: none"> <li>• Drop Stacker Standard</li> <li>• Power Stacker Optional (not available on Connect+® 500W, SendPro® P1500)</li> </ul>
High Speed Connectivity	<ul style="list-style-type: none"> <li>• 25" LAN Cable Standard</li> <li>• Wireless LAN Options</li> <li>• Rogers telecommunication 3G cellular available (Subscription charge applies).</li> </ul>

## Peripheral Options

- Drop or Power Stacker Options (Power Stacker not available with Connect+® 500W, SendPro® P1500)
- Compact Platform Weighing Options, 2.3 kg, 4.5 kg, 6.8 kg. Capacity (Only 4.5 kg capacity available with Connect+® 500W, SendPro® P1500)
- Large Platform Weighing Options: 6.8 kg, 13.6 kg, 31.8 kg, 67.6 kg Capacity
- 1E20 Laser Printer
- 1E31 Brother HL-L5100DN Report Laser Printer
- Barcode scanning for Tracking Services (Confirmation Services) and Accounting
- Wireless Keyboard option
- USB Hub - 4 Open Ports
- 1E26 Thermal Label Printer
- 1E28 Thermal Label Printer

# 3 - Using jobs

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## All about jobs

The Connect+ Series, SendPro P allows you to save common jobs that can be recalled and easily modified.

A job is a collection of settings you select and a name that are stored within the system's memory for easy recall. A job can contain set values for such items as the account name, postage amount, class, carrier, a special service, a mode such as Attached Scale or Differential weighing, etc. If you run different kinds of mail, such as Sealed and Unsealed, you may find it more convenient to create a job for each kind. These settings make the system easy to learn – especially for the casual operator who does not consistently use a mailing system.

The default job is the job you use to store your most commonly used system settings. These are the settings your system will use whenever you restart your machine. After a certain period of inactivity, or when you power up, the system restores the default job settings.

- You can manage your jobs (create, edit, delete, rename, etc.) or select a job to process mail against by selecting the **Run Mail** button in the Mailing tile on the Home screen.
- You can view a master list of the jobs on your system, and the settings associated with each job, by selecting the **Jobs** button in the Mailing tile on the Home screen.

Saved jobs are stored, and can be easily opened, edited, or deleted as necessary.

## About Mail Information

All of the job settings for the current job are displayed in a list box on the left side of the Run Mail screen called Mail Information. To view all of the job settings, select the down arrow below the list box.

If one of the job settings is required to run this job, it is displayed in red. For example, if the job requires you to assign a class, Class Required appears in red in the list box.

The items appearing in the Mail Information list box depend on the job selected. If you have selected a specific job type the available job settings are limited to those options that apply specifically to the job type. For example, if the job is a Seal only, No printing job, the list box only contains the sealer setting and the account selection (if available).

## The default job

There is always at least one job open in Run Mail - the default job.

The default job is special:

- it is always open, and
- it is protected so you don't overwrite it easily.

To clear all changes made while running mail and to return to the default job to its original state, select the **Reload job** link on the default job tab.

## Opening a job

Open a job to access the saved settings within that job.

1. Select the **Open a job** tab on the Run Mail screen, or select the **Jobs** button on the Home screen. The Jobs screen opens with a list of available jobs.
2. Select the job you wish to open. Up to five jobs can be open at the same time.
3. Select **OK**. A tab for the job opens on the Run Mail screen.

Jobs can also be opened using the optional Barcode Scanner, using barcodes set up with the job name inside.

## Previewing jobs

The Jobs screen lists all the jobs stored on your system.

1. Select the **Open a job** tab from within the Run Mail screen, or select the **Jobs** button in the Mailing tile on the Home screen.
2. The Jobs screen appears with a list of jobs available on your system.
  - If necessary, you can sort the jobs by name, type or creator. Select the appropriate column heading to change the sort order.
  - Use the up and down arrow buttons to scroll through the list.

3. Select the you want to preview. You can change the view of the job using the icons in the upper right corner of the screen.
  - a. **Job settings view** - Select this icon to view all of the settings for the selected job (for example, class, weighing type...), as well as an envelope preview.



- b. **List view** - Select this icon to view the complete list of jobs on your system. List view is the default view setting on your system.



4. Select the **back arrow** button to return to the Home screen, or select OK to open the currently selected job in the Run Mail screen.

## Creating a new job from the Run Mail screen

A job is a collection of settings you select and a name that are stored within the system's memory for easy recall. You can create a job

- by selecting **Create new job...** on the **Options** menu of the Run Mail screen.
- by editing an existing job and then selecting the **Save** as option on the Run Mail screen.
- by selecting **Create new job** button on the Jobs screen.
  - Watch this video or follow the instructions below to learn how to create a new job.

**Important:** Pitney Bowes does not recommend creating a Key in Postage Job because they are not IMI-compliant and will be removed in August 2024.

1. Select the **Run Mail** button in the Mailing tile on the Home screen.
2. Select the **Options** button, then select **Create new job....**
3. Select the appropriate job type from the list.
4. Select **OK**. The job you selected appears in a new job tab.
5. Select the appropriate job settings.
6. Select **Save As**.
7. Type in the new job name and select **OK**. You will be returned to the Run Mail screen with the new job active.

Here is an example of how to build a basic First-Class Mail® letter job:

1. Select **Postal Job**.
2. Select **Class**.
3. Select **Letter**.
4. Select **OK**.
5. Select **Save As**.
6. Enter a name for the job.
7. Select **OK**.

## Creating a new job from the Jobs screen

A job is a collection of settings you select and a name that are stored within the system's memory for easy recall. You can create a job:

- by selecting **Create new job** button on the Jobs screen,
- by selecting **Create new job...** on the **Options** menu of the Run Mail screen.
- by editing an existing job and then selecting the **Save** as option on the Run Mail screen,

Follow the steps below to create a new job from the Jobs screen.

1. Select **Jobs** in the Mailing tile on the Home screen.
2. Select the **Create new job** button.
3. Select the appropriate job type from the list.
4. Select **OK**. The Run Mail screen appears with the job you selected in a new job tab.
5. Select the appropriate job settings.
6. Select **Save As**.
7. Enter the new job name and select **OK**.

## Editing a job

You can edit a job by making changes to the job and envelope properties on the Run Mail screen.

1. Open the job that you want to edit.
2. Select the item you want to change.
  - To change anything that prints on the envelope, including the date, select the envelope. To change anything that prints on the tape, select the tape.
  - To change any of the job settings (for example, the class or mail), select the appropriate option in the Mail Information list located on the left side of the Run Mail screen.

3. Save your changes.

## Deleting a Job

Delete a job when you no longer use this group of settings on your meter.

You cannot delete the default job, an open job, or jobs that are locked against editing.

Follow these steps to delete a job:

1. Select **Jobs** in the Mailing tile on the Home screen.
2. Select the job you want to delete.
3. Select **Options**, then select **Delete job**.
4. Select **Yes, delete**.
5. Select **OK** when done.

## Job options

The **Options** button at the bottom of the Jobs screen allows you to manage and edit your jobs. Select the Options button and choose from one of the following.

- Rename job - Select this option if you want to rename the selected job. The job must be closed on the Run Mail screen before you rename it.
- Duplicate job - Select this option if you want to create a copy of the selected job.
- Delete job - Select this option if you want to delete the selected job. The default job, library jobs, and jobs that have been locked cannot be deleted.
- Make this job the default job - Select this option if you want to make the selected job the default job.

## Creating a duplicate job

1. Select the **Open a job** tab on the Run Mail screen, or select the **Jobs** button in the Mailing tile on the Home screen.
2. Select the job you want to duplicate.
3. Select **Options** then select **Duplicate job**. The system creates a duplicate job. This job appears

in the Job list below the original, with the word "copy" after the name.

4. Select **OK** when done.

## Setting the default job

The default job is the most commonly used job on your mailing system. It is automatically selected whenever you restart your mailing system. You can change the default job by editing it and then saving the changes, or you can open a different job and save that job as the default job.

Postage Correction and Date Correction jobs cannot be set as the default job.

### Setting the default Job on the Run Mail screen

1. Ensure the job you want to make the default is open and active on the Run Mail screen.
2. Select the **Options** button.
3. Select **Save as default job**. The selected job appears on the default jobs tab. The previous default job appears on a new tab.

### Setting the default job on the Jobs screen

1. Select **Jobs** in the Mailing tile on the Home screen.
2. Select the job you want to make the default.
3. Select **Options** then select **Make this job the default job**. The system gives the selected job the default icon. The job also appears on the default jobs tab in the Run Mail application.
4. Select **OK** when done.

## Reloading a Job

The Reload job option allows you to reset an edited or modified job to its original state. Use this option to discard changes you have made to a job.

On the run mail screen:

1. Select the modified job.

**Note:** An asterisk appears next to job name when it has been edited or modified.

2. Select **Reload job**. The system reverts to the previously saved version of the job.

## Job types

When creating a new job, you can select from the following job types.

- Select **Seal only, no printing** if you only want to seal the envelope and do NOT want to apply postage.
- Select **Date correction** when you need to print the correct date on a piece of mail that already has postage printed on it.
- Select **Postage correction** if you do not have the correct amount of postage on a piece of mail.
- Select **Received date and time** if you want to print the date or time on incoming mail for record keeping.
- Select **Graphic ad only** if you only want to print a graphic on the envelope.
- Select **Permit** if you want to print a permit on a piece of mail.
- Select **Postal** if you want to print postage on a piece of mail.
- Select **Weigh-Rate-Count** if you want to track the weight and rate of your mailpieces as well as count mail without printing postage.
- Select **Statement of Manifest** if you need to print evidence of payment for parcel shipments or bulk mailings using pre-printed permit envelopes.
- Select **Count Only** if you want to count mail without printing postage.

**Note:** The Weigh-Rate-Count job type is only available if your system uses accounting.

## Printing a graphic or text message

You can create a job to print only non-postal elements like a graphic or a text message on a tape or envelope. If your system uses accounting, a piece count gets retained for accounting reports.

1. Select Run Mail in the Mailing tile on the Home screen.
2. Select **Options**.
3. Select **Create a new job...**
4. Select **Graphics ad only**.
5. Select **OK**. The job you selected appears in a new job tab.
6. Select **Edit Envelope**.

7. Add any graphics or text messages you wish to print.
8. (Optional) Select **Color Print Quality**.
9. (Optional) Select desired print quality. Keep in mind that selecting a better print quality results in a slower print.
10. Select **OK** to return to the Run Mail screen.
11. Type in the envelope or tape quantity, and then select **Start** or **Tape**.
12. Select **Save As** to save the job for future use.
13. Enter the new job name and select **OK**.

## Printing a date correction

You can print a date correction if you need to modify the date printed on your envelope. If you have already created a date correction job, open the job and begin running mail.

1. Select the **Options** button at the bottom of the Run Mail screen.
2. Select **Create new job...** and then select **Date correction**.
3. Select **OK**. A new job tab appears. The Mail Information list is populated with the required date correction job settings.

**Note:** The weighing method is not displayed in the postage correction job. Sealing mode is set to off.

4. If necessary, change the format of the date.
5. If you are printing a tape, select the **Tape** button.
6. If you are printing on an envelope and if the envelope is sealed, change the sealing method to sealer off.
  - a. Turn the piece of mail around 180 degrees so that the postal indicia is in the lower left corner. Place the envelope on the feed deck with the flap facing down.
  - b. Select the **Start** button.
7. To save the job, select the **Save As** link at the top of the screen.
8. Enter the new job name and select **OK**.

## Printing a postage correction

If you do not have the correct postage on a piece of mail, you can add more postage by printing a postage correction directly on the envelope or on a tape. If you have already created a postage correction job for the amount required, open the job and begin running mail.

1. Select the **Options** button at the bottom of the Run Mail screen.
2. Select **Create new job...** and then select **Postage correction**.
3. Select **OK**. A new job tab appears. The Mail Information list is populated with the required postage correction job settings.

**Note:** The weighing method is not displayed in the postage correction job. Sealing mode is set to off.

4. The Postage correction amount screen opens. This screen displays the acceptable range of values you can enter, and the field where you enter the specific amount.
5. Type in the additional postage required and select **OK**.
6. If you are printing a tape, press the **Tape** button.
7. If you are printing on an envelope, turn the piece of mail around 180 degrees so that the postal indicia is in the lower left corner.
  - a. Place the envelope on the feed deck with the flap facing down.
  - b. Press the **Start** button.
8. To save the job, select the **Save As** link at the top of the screen.
9. Enter the new job name and select **OK**.

## Printing the received date and time

The Received date and time option allows you to print the current time and date, along with the word “Received” on incoming mail. If you have already created a received date and time job, open the job and begin running mail. If your system uses accounting, a piece count will be retained for accounting reports.

**Note:** When printing the date and/or time, the sealer is set to off.

Follow the steps below to create a received date and time job.

1. Select the **Options** button at the bottom of the Run Mail screen.
2. Select **Create new job...** and then select **Received date and time**.
3. Select **OK**.
4. Select **Start** or **Tape**.
5. To save the job, select the **Save As** link at the top of the screen.
6. Enter the new job name and select **OK**.

## Printing a permit

You can print a permit on a piece of mail instead of an indicia. A permit is a postal mark containing a permit number that provides you with special processing or discount rates. You get the permit(s) from Canada Post.

1. Select the **Options** button at the bottom of the Run Mail screen.
2. Select **Create new job...** and then select **Permit job**.
3. Select **OK**. A new job tab appears. The Mail Information list box is populated with the required permit job settings.
4. Select the **Company Name, Customer or Permit Number** button in the Mail Information list box.
  - a. Enter either the permit number or the company name.
  - b. Select **OK**.
5. Select **Edit Envelope**.
6. Select the required permit and confirm with **OK**.
7. Select the **Class** button.
  - a. Select the appropriate class.
  - b. Select **OK**.
8. To save the job, select the **Save As** link at the top of the screen.
9. Enter the new job name and select **OK**.

## Sealing envelopes without printing postage

You can create a job to seal envelopes without printing anything on the envelope. If your system uses accounting, a piece count will be included in accounting reports.

1. Select the **Run Mail** button in the Mailing tile on the Home screen.
2. Select **Options**.
3. Select **Create new job....**
4. Select **Seal only, no Printing**.

**Note:** Print date is off in Seal only job.

5. Select **OK**. The job appears in a new job tab.
6. Select **Start** to begin feeding and sealing envelopes.
7. If you want to save this job, select **Save as**.
8. Enter the new job name and select **OK**.

## Weighing, rating and counting mail without printing postage

If your system uses accounting, you can create a job to weigh, rate and count mail without printing postage. In addition, you can add a graphic ad to the mailpiece. The weighing and rating information, as well as the piece count, will be included in accounting reports.

1. Select the **Run Mail** button in the Mailing tile on the Home screen.
2. Select the **Options** button.
3. Select **Create new job....**
4. Select **Weigh-Rate-Count**.
5. Select **OK**. The job appears in a new job tab.
6. Select the appropriate counter and then select **OK**.
  - **Total - Weigh-Rate-Count**: total number of pieces for the current job.
  - **Resettable - Weigh-Rate-Count**: the total number of pieces run since you reset the counter.
7. If necessary, add a graphic to the job.
8. Select an account.

9. If necessary, select a surcharge.
10. Select the appropriate class, carrier, or special services.
11. Select **Start** to begin feeding and counting envelopes.
12. If you want to save this job, select **Save as**.
13. Enter the new job name and select **OK**.

## Statement of Manifest

You can print an indicia as evidence of payment for the other types of mailings and shipments including:

- Multiple parcel shipments
  - Bulk mailings using pre-printed permit envelopes
1. Select the **Options** button at the bottom of the Run Mail screen.
  2. Select **Create new job....** and then select **Statement of Manifest**.
  3. Enter the mailing/manifest amount.

**Note:** If the amount exceeds the High postage value set for your system you are prompted to confirm or re-enter the amount.

4. Select **OK**. The job appears in a new job tab.
5. Select **Start** to begin feeding and sealing envelopes.
6. If you want to save this job, select **Save as**.
7. Enter the new job name and select **OK**.

## Counting Mail without Printing Postage

If your system uses accounting, you can create a job to count mail without printing postage. The piece count will be included in accounting reports.

If you have already created a count only job, open the job and begin running mail.

1. Select the **Run Mail** button in the Mailing tile on the Home screen.
2. Select the **Options** button.
3. Select **Create new job....**

4. Select **Count Only**.
5. Select **OK**. The job appears in a new job tab.
6. Select the appropriate counter and then select **OK**.
  - **Total - Count only**: total number of pieces for the current job.
  - **Resettable - Count only**: the total number of pieces run since you reset the counter.
7. Select an account.
8. If necessary, select a surcharge.
9. Select **Start** to begin feeding and counting envelopes.
10. If you want to save this job, select **Save as**.
11. Enter the job name and select **OK**.

## Saving changes to a job

If you have made changes to a job, an asterisk appears next to the job name on the Run Mail screen. You can save your changes to a job at any time. If you want to discard the changes you've made, you can reload the previously saved version of the job.

- To save your changes to the selected job, select **Save**.
- To save your changes as a new job select **Save as**. Enter a new job name and then select **OK**.

## Closing all jobs

Select **Start over** on the Run Mail screen to close all open jobs, discard all unsaved edits made to saved jobs, discard all unsaved jobs and reload the default job.

**Note:** The Start over option does not allow you to save changes made to the default job.

# 4 - Running mail

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## Determining the correct postage method

- If your mail requires no application of postage, see **Chart C** to choose your job settings.
- If your mail requires postage, you must determine if you can print directly on your mail. You can feed mail provided your mailpieces meet the requirements (material type, dimensions, and thickness) for your mailing system. If your mail meets these requirements, select the appropriate postage or weighing method from **Chart A**.
- If your mail does NOT meet your mailing system requirements for direct printing, you **MUST** print a postage tape. Select the applicable postage or weighing method from **Chart B**.

Chart A: Printing on mail

If:	Then use this method:
You are running postcards.	Select the Postage Rate when selecting the Class.
You do not know the weight of your piece of mail.	Attached Scale
The pieces of mail are different weights but fall within the guidelines listed above and in the Mail Piece Specifications topic.	WEIGH-ON-THE-WAY® (W-O-W®)
All pieces of mail are identical.	WEIGH-ON-THE-WAY® (W-O-W®), first piece only
Your pieces of mail vary in types, sizes, and/or weights and you have several you need to process quickly and efficiently.	Differential weighing with Auto envelope printing selected

Chart B: Printing on tape

If:	Then use this method:
You do not know the weight of your piece of mail.	Attached Scale
You have several pieces of mail and do not know the required postage amounts.	Attached Scale
You know the weight.	Manual weight entry
Your pieces of mail vary in types, sizes, and/or weights.	Differential weighing with Auto tape printing selected

Chart C: Processing mail without postage

If:	Then use this method:
You only want to seal the envelopes and do not want to apply postage.	Seal only
You want to print the date or time incoming mail for record keeping.	Date and Time non-postal jobs

## Preparing and correctly feeding the mailpieces

If your system has WEIGH-ON-THE-WAY® (W-O-W®) (Connect+ 500W, SendPro P1500, Connect+ 2000, SendPro P2000 or Connect+ 3000, SendPro P3000), you do not need to sort your mail. Simply place the larger pieces on the bottom of the stack on the feeder. If your mailpieces are sealed, fan them to make sure they are not stuck together as a result of previous processing.

If you system does not have WEIGH-ON-THE-WAY® (W-O-W®):



## Envelope dimensions

Minimum	Maximum
89 mm x 127 mm postcard size	Connect+ 500W, SendPro P1500, Connect+ 1000, SendPro P1000 and Connect+ 2000, SendPro P2000: 330 mm x 356 mm  Connect+® 3000, SendPro® P3000: 381 mm x 381 mm

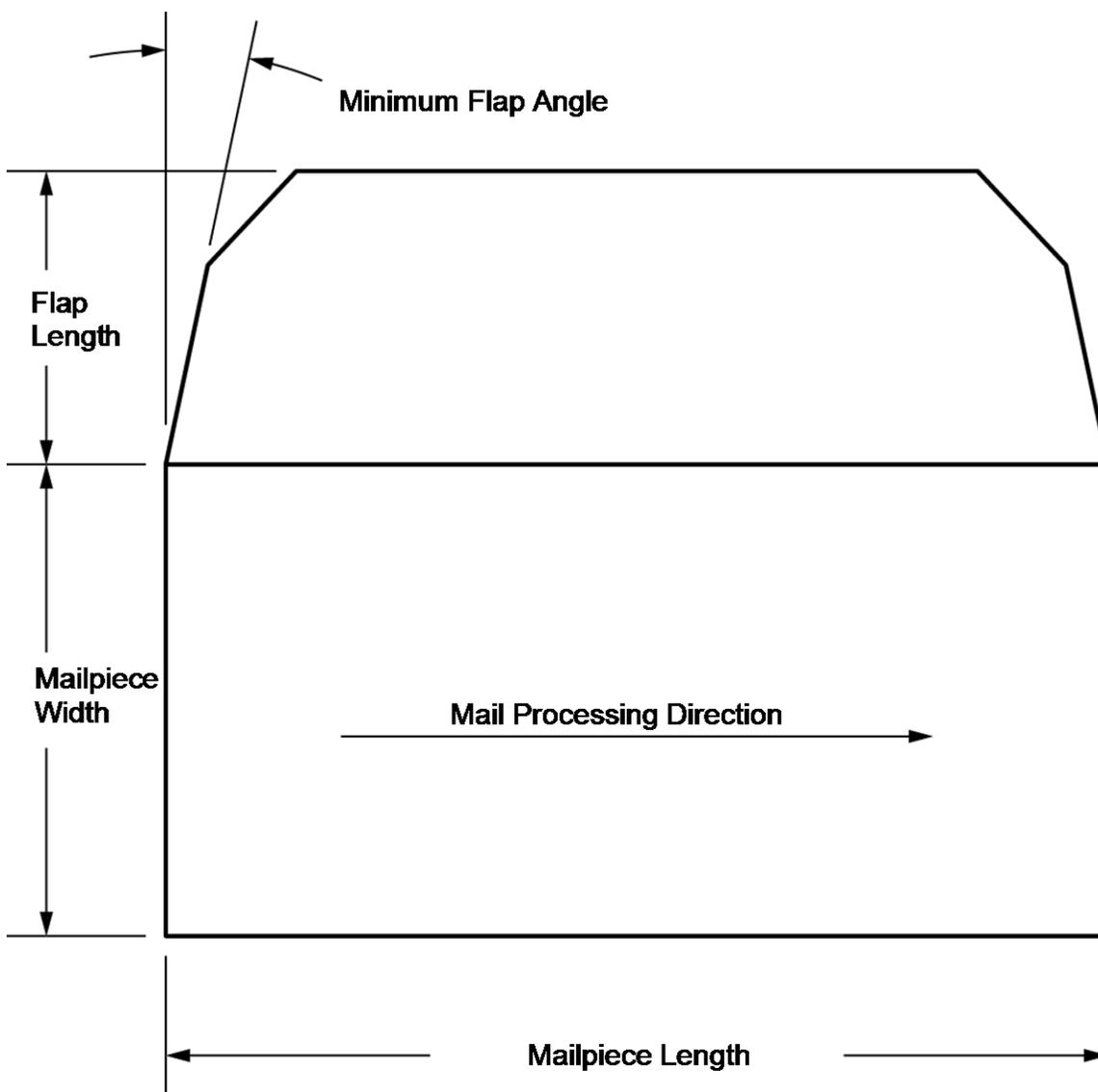
## Envelope thickness

Minimum	Maximum
Connect+ 500W, SendPro P1500, Connect+ 1000, SendPro P1000 and Connect+ 2000, SendPro P2000: 0.007 mm  Connect+ 3000, SendPro P3000: 0.18 mm	Connect+ 500W, SendPro P1500, Connect+ 1000, SendPro P1000 and Connect+ 2000, SendPro P2000:  Connect+ 3000, SendPro P3000: 19 mm

## Envelope flap depth for sealing

Minimum	Maximum
25 mm	Connect+ 500W, SendPro P1500, Connect+ 1000, SendPro P1000 and Connect+ 2000, SendPro P2000: 76 mm  Connect+ 3000, SendPro P3000: 98 mm

- For envelopes with a flap length from 25 mm to 60 mm, the minimum flap angle is 18 degrees.
- For envelopes with a flap length greater than 60 mm to the maximum flap length for the particular model, the minimum flap angle is 21 degrees.



## Acceptable envelope materials

Material type and finish must be matte and may include (if available in your market):

- White Wove
- Kraft/Brown Kraft
- Manila

- Envelopes made of recycled paper
- Self-seal envelopes
- Tri-fold tabbed (2 tabs minimum) inserts (20 lbs. (75 gms) to 28 lbs. (105 gms))
- Cranes Crest



**Caution:**

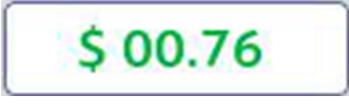
Do not use envelopes or fliers made with glossy materials or also Tyvek® envelopes. Also, do not use envelopes too fragile (such as air mail and onion skin envelopes) to pass through the feeder.

## Running mail - quick start

**Note:** If you have accounts enabled on your system, you must select an account before you can run a mail job.

1. Select the **Run Mail** button in the Mailing tile on the Home screen.
2. Ensure that the appropriate job is open and selected on the Run Mail screen.
3. Load the envelopes.
4. Check the postage amount on the screen.
5. Check the sealer setting.
6. Select **Start** or **Tape** to run the job.

## Run Mail screen icons and buttons

Button, Icon, or Link	Touching or Selecting:
<p data-bbox="172 510 367 537">Tape Preview icon</p> 	<p data-bbox="686 510 1146 537">Displays a preview of the tape to be printed.</p>
<p data-bbox="172 753 388 781">Tape Preview image</p> 	<p data-bbox="686 753 1425 821">Opens the Edit Envelope screen allowing you to make changes to your envelope.</p>
<p data-bbox="172 995 412 1022">Envelope Preview icon</p> 	<p data-bbox="686 995 1195 1022">Displays a preview of the envelope to be printed.</p>
<p data-bbox="172 1236 433 1264">Envelope Preview image</p> 	<p data-bbox="686 1236 1425 1304">Opens the Edit Envelope screen allowing you to make changes to your envelope.</p>
<p data-bbox="172 1562 418 1589">Postage Amount image</p> 	<p data-bbox="686 1562 1040 1589">Shows the current postage value.</p>

Button, Icon, or Link	Touching or Selecting:
<p data-bbox="172 386 293 413">Date image</p> 	<p data-bbox="686 386 1433 449">Opens the Print Date dialog box within the Edit Envelope screen so you can modify the date printed on tape or envelope.</p>
<p data-bbox="172 621 293 648">Start button</p> 	<p data-bbox="686 621 1409 648">If the job is selected and envelopes loaded, this starts the job running.</p>
<p data-bbox="172 850 293 877">Tape button</p> 	<p data-bbox="686 850 1320 877">If the job is selected and ready, this results in running the job.</p>
<p data-bbox="172 1079 318 1106">Weighing icon</p> 	<p data-bbox="686 1079 1442 1142">The weighing icon opens the weighing method dialog screen. The shape of this icon varies depending on the weighing method for the current job.</p>
<p data-bbox="172 1308 289 1335">Sealer icon</p> 	<p data-bbox="686 1308 1385 1371">The sealer icon opens the sealing method dialog screen. The icons shown here indicates sealing is on.</p>

## Run Mail options

Select **Options** button at the bottom of the Run Mail screen and select the appropriate option.

- **Print a sample piece** - prints an envelope or tape so you can see exactly how the Ad/Graphic elements will print on the mailpiece for the current job.
- **Zero attached scale** - this ensures that the attached scale is reading zero when there are no mailpieces on it.
- **Create a new job** - select this to create a new job.
- **High value warning** - set a value at which the mailing system warns you that you have entered a postage value that is more than the amount you are setting here. This feature prevents you from accidentally printing a postage amount that is more than you need.
- **Show Envelope Quantity** - set a value if you need the machine to run a set amount of envelopes. This feature is useful for running set batches of mail.

## Changing the class, carrier, or special services

1. Select the **Run Mail** button in the Mailing tile on the Home screen.
2. To display and select the classes and services available on your system or in your country open a postal job and select **Class** in the Mail Information list box on the Run Mail screen.
3. Select the **All classes and services** tab on the classes and services screen. When you select this tab, the last class selected is displayed. To clear the selected class and any associated services, select **Start over** within this tab.

4. Select the class from the class list box.

**More information about selecting a class:**

- If the class has other subclasses associated with it, it will have a plus sign (+) in front of it. Selecting the class will display the additional subclasses within the Class list box.
  - If an option button appears in front of the class, the postage amount is typically displayed after the class name.
  - Selecting the back arrow button at the top of the Class list box returns you to the previous class level.
  - If the class requires additional information, it will display ellipses "... " after the name. When you select this class, you are prompted to type in the additional information.
  - When you select a class, the rating factors for that class appear in the list box on the left of the Run Mail screen. To change any of these factors, select the item in the list box.
  - If special services are available for a class, they are displayed in the Extra services list box. To select a service, touch the checkbox for the service.
  - If you select a class or service that is incompatible with a.) the weighing method, b.) the weight of a mailpiece currently on the scale, c.) a weight or amount of postage entered manually, d.) or a destination, a dialog box appears and prompts you to modify the item. For example, if the weighing method is incompatible you are prompted to select a new method.
5. If the class or weight requires a Zone orPostal Code, the system prompts you to enter it.
  6. If you select an International rate, the system prompts you to select the country.
  7. Select any extra service or services available for the class from the Extra services list box.
  8. Select **OK**.

## Selecting a country

If you select a class from within the Run Mail screen that requires a country (for example, International), the system prompts you to select it.

The list of available countries appears in the Destination Country dialog screen. Scroll through the list and select the option button next to the appropriate country.

**Note:** You are only prompted to enter a country if the job does not have a country stored, or if you have re-powered the system. Once you enter a country, the system stores it and will continue to use it. In order to change it, you must select a different destination by touching or selecting the Destination option in the Mail Information list on the left side of the Run Mail screen.

## Selecting a Zone or Postal Code

If you select a class or weight from within the Run Mail screen that requires a Zone or destination Postal code, the system prompts you to enter it.

Use the keyboard to enter the Postal code, then select **This is a Postal Code**.

**Note:** You are only prompted to enter a Postal code or Zone if the job does not have a code, or if you have re-powered the system. Once you enter a Postal code, the system stores that value and will continue to use it. In order to change it, you must select a different class.

## Changing the sealing method

You can change the sealing method for a job while running mail. You can turn the sealer on and off or seal envelopes without printing postage.

1. Ensure that the appropriate job is open and selected on the Run Mail screen.
2. Select the Sealer icon.
3. Select the appropriate sealing option.
  - Select **Sealer on** to print postal and/or non-postal elements and seal the envelope.
  - Select **Sealer off** to print postal and/or non-postal elements without sealing the envelope.
  - Select **Sealing only, no Printing** to seal the envelope without printing.

4. If you selected "Sealer on" or "Sealing only, No printing" you can adjust the wetness of the sealer for this job. Select and drag the control button to adjust the wetness. 1 is the driest setting; 9 is the wettest. Use the + and - buttons for a more precise selection.

**Note:** This adjustment only changes the wetness setting for the selected job. If you do not adjust the wetness, the job will use the default sealer wetness setting.

5. If you are using a Connect+ 3000, SendPro P3000, and you selected "Sealer on" or "Sealing only, No printing", select the appropriate flap position:
  - **All envelopes are open flap and nested**, or
  - **Some envelopes are closed flap (No previously sealed envelopes)**.
6. Select **OK**.
7. Select **Start** to run the job, or **Reload job** to return to the previously saved version of the job.

## Changing or selecting the weighing method

1. Ensure that the appropriate job is open and selected on the Run Mail screen.
2. Select the **Weighing** icon.
3. Select the appropriate weighing method:
  - WOW
  - WOW, first piece only
  - Attached scale
  - Differential weighing
  - Manual weight entry

If your system does not have the optional WEIGH-ON-THE-WAY® (W-O-W®) or Manual weight entry method, you need to select the **Attached scale** method.

4. Select **OK**.

If you are running mail with mixed sizes and weights, refer to How do I run mail that has different sizes and weights.

## Possible errors when running mail

- If the system detects a condition that allows you to continue processing the job like "Low postal ink" you can clear the message and continue to process the mail. The system will also provide instructions on how to correct the warning, for example, how to replace the postal ink cartridge.
- If the condition prevents the system from completing the job, like "Out of postal ink", it provides instructions on how to correct the condition and then continue to process the mail.
- If you attempt to process a mailpiece whose weight or size is not appropriate for the job class, the system will offer to auto rate the mailpiece or you, or provide you with the option of selecting another class.

## Step-by-Step Running Mail

Use the Run Mail screen to select your job or review current job settings. This screen also keeps a running count of the processed mail. Refer to Run Mail Screen Icons and Buttons for a summary of the screen icons.

**Note:** If you have accounts enabled on your system, you must select an account before you can run a mail job.

1. Select the **Run Mail** button in the Mailing tile on the Home screen.
2. Select an available job tab (or jobs) or open another job using the Open a Job tab along the top of the screen.
3. Verify the current job settings displayed in the Mail Information list box on the left side of the Run Mail screen. To change any of the settings, select the item, for example, select **Class** to change the class.

### More information:

- To change the weighing or sealing method, select its icon on the Run Mail screen.
  - To change the number of envelopes or tapes to print for this job, select the Envelope or Tape link tab on the Run Mail screen.
4. To make changes to the envelope, or to the items that print on the envelope, select the **Edit envelope** link on the Run Mail tab. This opens the Edit envelope screen.

5. To change the speed at which you process mail, select **Machine Speed** from the Mail Information list box.
6. To preview the envelope, select the **View full preview** button at the bottom of the Edit envelope screen.
7. To view other possible options (for example, to print a sample mailpiece) select the **Options** button at the bottom of the screen.
8. Load envelopes and press the **Start** button, or if printing to tape, press the **Tape** button.

### More information:

- If you have not loaded the envelopes onto the feeder, or if you need to add more mail to the feeder, the Run Mail screen shows the message "Waiting for Envelope".
  - If after a certain time you have not loaded envelopes, the feeder will stop and the message "Stopping..." is displayed.
9. As the system processes the mailpieces, it keeps track of the number of pieces and the total postage amount. To check or clear the piece count, select the **Counter** button at the bottom of the Run Mail screen.
  10. If an envelope or tape jams during printing, the system stops and displays the location of the jam. Once you clear the jam you have to option of printing another envelope or tape.
  11. To save any changes you have made to this job, select **Save** or **Save as** on the top of the Run Mail screen.

## Running a Manual Weight Entry job

When you need to use a scale that is not connected to your system, you can still use the system to calculate the postage for you.

1. Select the **Run Mail** button in the Mailing tile on the Home screen.
2. Select a job that uses Manual weight entry.
3. Place the mailpiece on the detached scale and note its weight.
4. Select the **Weighing** icon.
  - a. Ensure the **Manual weight entry** option is selected.
  - b. If necessary, change the weighing units.
  - c. Type in the mailpiece weight.
  - d. Select **OK** to go back to the Run Mail screen.
5. Select the class of service.

6. Put the mail on the feed deck.
7. Select **Start**, or if printing to tape, select **Tape**.

## Weighing methods

When creating a postal job, you can select from the following weighing methods.

- The WEIGH-ON-THE-WAY® (W-O-W®)\* method processes mixed mail (mail of varying sizes and weights, depending your system configuration) and determines the postage amount based on the weight and dimensions of each mailpiece.
- Use the WEIGH-ON-THE-WAY® (W-O-W®), first piece only method for mailpieces that are identical (same size and number of sheets). The system weighs the first piece of mail to be fed and calculates the postage. The rest of the stack will be posted with the same postage as the first piece.
- Use the Attached scale method if you do not know the weight of the piece of mail.
- Use the Manual weight entry\* method if you want to type in the weight of an item that you weighed on a separate scale. This is useful for items that exceed the weight capacity of the attached scale or mailings that are always the same weight.
- Use the Differential weighing\* method if you want to place all of the mail on the scale at once, then remove and run each piece through the system. The system calculates the postage for each piece of mail you remove from the scale and applies the postage to the piece as it goes through the mailing system. For larger pieces of mail (large envelopes or packages), you can use differential weighing to have the system automatically print a tape every time you remove a piece of mail from the scale.

## Running an Attached Scale job

If you have a large mailpiece that cannot be fed through your machine and you have an attached scale, use the Attached Scale method. Note that the system will automatically select this method if you place a piece of mail on your attached scale. It will also display the weight of the mailpiece next to the Weighing icon on the Run Mail screen. If the scale is not set to zero when there is no weight on the scale you can reset it to zero.

1. Select the **Run Mail** button in the Mailing tile on the Home screen.
2. Select a job that uses an attached scale or select the Weighing icon.
  - a. Select the **Attached scale** option.
  - b. Make sure the scale reads 0 when there are no mailpieces or any objects on the scale. If necessary, select **Zero Scale**.
  - c. Select **OK**.
3. Place the mailpiece on the scale. The amount displays next to the Weighing icon.

**Note:** If you remove the mailpiece from the scale, a timer begins and when the timer expires, the Run Mail screen displays the minimum postage amount for the class you selected and the weight returns to zero. This timer can be set in the range of 10 to 60 seconds. Refer to Setting System Timeouts for information on setting the timer.

4. If you are printing on tape, select **Tape**. If you are printing postage on the mailpiece, place the piece on the feed deck and select **Start**.

## Zeroing the scale while running mail

Use this if you have an attached scale and it displays a weight greater than zero when there is nothing on the scale.

1. Select the **Run Mail** button in the Mailing tile on the Home screen.
2. Select the **Weighing** icon.
3. Select the **Attached scale** option.
4. Select the **Zero scale** button under the current weight.

## Running a WEIGH-ON-THE-WAY® (W-O-W®) job

The WEIGH-ON-THE-WAY® (W-O-W®) method increases your productivity by weighing the piece of mail and applying the correct postage as it travels through the mailing machine. You do not have to sort your mail by weight before processing.

**Caution:**

Do not lean on or disturb the system while it is processing mail in this mode. It will affect the amount of postage applied to the mailpiece.

1. Select the **Run Mail** button in the Mailing tile on the Home screen.
2. Select a job that uses WEIGH-ON-THE-WAY® (W-O-W®) or select the Weighing icon.
  - a. Check to see that the weighing method is set to WEIGH-ON-THE-WAY® (W-O-W®). If necessary, select the **WOW** option.
  - b. Select **OK**.
3. Put all of the mail on the feed deck.
  - All mail must be the same width.
  - Use the side guide to guide the mail into the feeder.
4. Select **Start**.

If you prefer to use a different class for mail over a certain weight, you can set the system to not print postage above that weight. To do this modify the WEIGH-ON-THE-WAY® (W-O-W®) weight limit.

## Running a WEIGH-ON-THE-WAY® (W-O-W®) - First Piece Only job

Use this method if all of the mailpieces in your job are identical, for example, if they all have the same number of pages in the same size envelope. Since the system only has to weigh the first piece, this job runs faster.

In this weighing method, the machine weighs the first mailpiece and processes the remaining mail at the same postage rate. If Shape Based Rating (SBR) class is used, the first envelope is also measured.



**Caution:**

Do not lean on or disturb the system while it is processing mail in this mode. It will affect the amount of postage applied to the mailpiece.

1. Select the **Run Mail** button in the Mailing tile on the Home screen.
2. Select a job that uses WEIGH-ON-THE-WAY® (W-O-W®) - first piece only or select the Weighing icon.
  - a. Select **WOW, first piece only**.
  - b. Select **OK**.
3. Put all of the mail on the feed deck.
4. Select **Start**.

## Running mail with different shapes and weights

For some classes of service, the Post Office bases the price of the mailpiece on both the weight and the shape of the item. Systems equipped with Weigh-On-The-Way® (WOW®) can weigh and measure the mailpiece as it moves through the system when a Shape Based Rating class is selected.

1. Open the appropriate job.
2. Set or verify that the weighing method is set to WEIGH-ON-THE-WAY® (W-O-W®).
3. Select **Class** in the Mail Information list box and select the option for Shape Based Rating. Select any other services required from the Extra services list box on the right of the screen.
4. Select **OK**.
5. Place the mail in the feeder.
6. Select **Start** to begin running mail.

The mailpiece feeds into the mailing system and gets weighed. As it moves through the system, the thickness, length, and width of the envelope get measured. Depending on the weight and measurements, the appropriate postage rate gets selected and the postage is calculated.

If an item's postage cannot be calculated because of its weight or dimension, use the attached scale method and manually select the appropriate class.

**Note:** For a detailed description of postal services, see the Canada Post website.

## Running a differential weighing mail job

Differential weighing is available on your meter if it has an attached scale and you have subscribed to this feature. This option allows you to place all of the mail on the scale, then remove each piece, one at a time and run it through the meter. The meter calculates the postage for each piece of mail you remove from the scale and applies the postage to the mail as feeds through the meter.

For larger pieces of mail (large envelopes or packages), use differential weighing to automatically print a tape every time you remove a piece of mail from the scale.

Before using differential weighing:

- Make sure each piece of mail weighs at least as much as the amount specified as the differential weighing threshold.
  - Make sure the stack of mail is less than the capacity of the scale. If **Weight exceeds scale capacity** appears on the screen, remove some mail until the message disappears.
1. Select **Run Mail** in the Mailing tile on the Home screen.
  2. Select a job that uses Differential weighing or select the Weighing icon.
    - a. Select **Differential weighing**.
    - b. If necessary, edit the Differential weighing threshold.
    - c. Select the appropriate print option:
      - Auto tape printing - select this option if your mail is made up of pieces that can't be processed through the meter, like packages or thick envelopes. Each time you remove a piece of mail from the scale, the meter will print a postage tape automatically.
      - Auto envelope printing - select this option if you have a stack of envelopes that can be run through the meter. The meter will automatically feed the envelope and print postage.
      - Envelope or tape printing - select this option if you have mail that is a mix of envelopes and packages (mailpieces that can be run through the meter and others that require a tape). Each time you remove a piece of mail from the scale, you need to select either **Start** or **Tape** to print postage.
    - d. Place the mail on the scale and select **OK**.
  3. Select the class of service.

4. Remove one piece of mail. Remove each piece of mail in a single continuous upward motion. Do not slide the mailpiece across mail on the scale.
5. The meter calculates how much that piece of mail weighs by checking how much less the stack of mail weighs.
6. If the destination country is needed for the piece of mail, the meter will prompt you for it.
7. The print option you selected determines how postage will print.
  - If you chose the Auto tape printing option, the meter prints a postage tape.
  - If you chose the Auto envelope printing option, place the piece of mail on the feed deck. The meter will automatically feed the envelope and print postage.
  - If you chose the Envelope or tape printing option, select **Tape** to print a postage tape or place the piece of mail on the feed deck and select **Start**.
8. When the last item is removed from the scale, the meter asks you if you want to print postage just in case you are removing an empty mail tray.

## Editing the Differential weighing threshold

When you use the Differential weighing method, each piece of mail must weigh at least as much as the Differential weighing threshold.

- If you set the threshold too high, the scale will not recognize the removal of a piece of mail that falls below the weight threshold.
- If you set the threshold too low, you may be prompted to return a piece of mail to the scale. This will happen if the weight cannot be recorded properly due to bounce on the scale.

**Tip:** Weigh the lightest piece of mail in the stack and set a threshold *below* that value.

To edit the Differential weighing threshold:

1. Ensure that the appropriate job is open and selected on the Run Mail screen.
2. Select the **Weighing** icon.
3. Select **Differential weighing**.
4. Select **Edit threshold**.
5. Type in the appropriate threshold.
6. Select **OK**. The system returns you to the weighing method dialog box.
7. Select **OK** to return to the Run Mail screen.

## Running mail using a barcode scanner

If you are running a job that uses barcode labels, for example, if you are using combined barcode label jobs and if the barcode also contains the text "START", the system will automatically begin processing the mail run for that job.

Similarly, if the barcode contains the text "TAPE", the system will automatically begin printing a tape for the mail run.

The optional Barcode Scanner can be used to select an Account, a Job or a JobID1 or JobID2 identity from within the mail run Screen.

If the scanned barcode contains the text "STOP", the system will automatically stop processing the mail run for that job.

**Note:** This assumes there are no other required fields open on the Run Mail screen that require you to enter information or select an option. For example, if the job also requires an account, the Run Mail screen will prompt you for the account number.

## Changing the envelope or tape quantity

Specifying the number of envelopes to print allows you to count down and stop the machine after a certain number of pieces have been processed. For example, you might want to remove a certain number from the stacker and place in a separate tray or bag.

To change the number of envelopes or tapes to print, toggle between the Envelope quantity or Tape quantity tab on the Run Mail screen.

1. Ensure that the appropriate job is open and selected on the Run Mail screen.
2. Select the **Envelope quantity** or **Tape quantity** tab on the Run Mail screen.
3. Select the envelope or tape **Quantity** box.

4. Select one of the preset quantities or enter a different number of envelopes or tapes. Select **OK**.

**Note:** The maximum envelope quantity is 10,000. The maximum tape quantity is 100.

5. Select the **Start** button for envelopes, or **Tape** button for tapes. The system will stop once it has processed the number of envelopes / tapes you specified.

## Advancing or omitting the date

You can advance the date to print a date up to thirty days ahead or omit the date so that it does not print on your mail.

1. Ensure that the appropriate job is open and selected on the Run Mail screen.
2. Select **Edit Envelope**.
3. Select **Print Date**.
4. Select the desired date option:
  - **Print today's date**
  - **Today + 1**
  - **Select from calendar**
5. Select the desired format option.
6. Select **OK**.

## Changing the machine speed

1. Ensure that the appropriate job is open and selected on the Run Mail screen.
2. Select **Machine speed** from the Mail Information list box on the left side of the Run Mail screen.
3. Select the appropriate setting (Normal, Reduced, Slow, Very Slow).
4. Select **OK** when done.

## Printing a sample mailpiece

Run a sample mailpiece to make sure your job will run and that all the elements (address, Ad/Graphic etc.) are positioned correctly.

1. Ensure that the appropriate job is open and selected on the Run Mail screen.
2. Select the **Options** button.
3. Select **Print a sample piece....**
4. Select **Start** or **Tape**.

## Counting mailpieces

You can count how many pieces of mail you run:

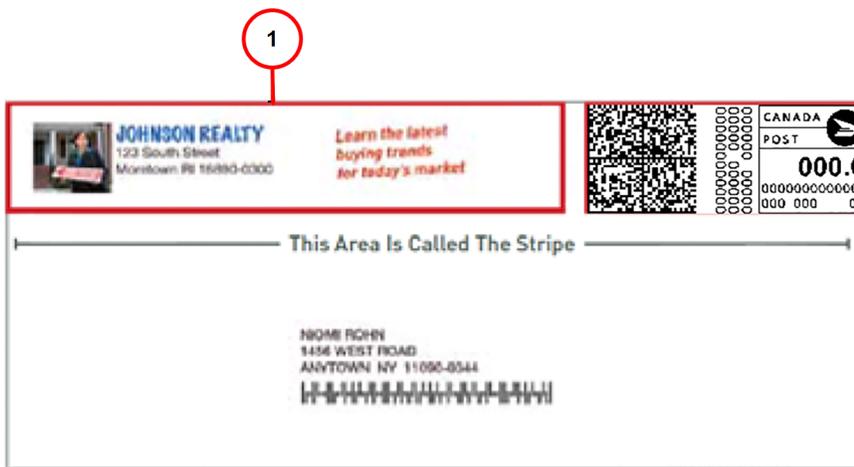
1. From the Run Mail screen, select the counter button at the bottom of the screen. The button is labeled either as **Resettable counter**, or **Total pieces** depending on the job type.
  - Postal jobs:
    - **Total Pieces** - the total number of mailpieces and the postage amount for the current job.
    - **Resettable counter** - the total number of pieces run and the total postage amount since you reset the counter.
  - Seal only jobs:
    - **Total Pieces** - total number of seal only pieces.
    - **Resettable counter** - the total number of seal only pieces run since you reset the counter.
  - Non-postal jobs:
    - **Total Pieces** - total number of non-postal only pieces.
    - **Resettable counter** - the total number of non-postal only pieces run since you reset the counter.
2. Select the **Reset to Zero** button to reset the resettable counter (or clear the batch count).

## Adding graphics, return addresses, messages, and inscriptions to your mail

You can add customised Graphic Ads, Text Messages, Return Addresses and inscriptions (if available in your country) onto envelopes or tapes. By adding marketing, advertising, and other promotional messages, you can now design an outer envelope that reinforces the internal message.

**Note:** If your mailing meets certain requirements, you can use Addressed Admail to add personalized direct marketing messages to you mailpieces. Refer to Adding Addressed Admail to Your Mail.

You place these images in the Transpromotional zone (1) on the envelope or tape.



You also have the option of printing date and time stamps on incoming mail.

You make changes to you envelope by selecting anywhere within envelope on the Run Mail screen. You can also select the **Edit envelope** link. All of selections for modifying the envelope are contained in a list box on the left side of the Edit Envelope screen. Note that the options available will depend on how your system is configured and whether your system has colour capability.

## Adding Addressed Admail to Your Mail Pieces

To qualify as Addressed Admail, your mailing must meet the following requirements:

- Be promotional in nature.
- Contain a uniform message.
- Include a minimum of 1,000 pieces to Canadian addresses.
- Meet address accuracy requirements (when mailing over 5,000 pieces).
- Be prepared and/or presorted in a specific way.

To set up Addressed Admail:

1. Select the **Run Mail** button in the Mailing tile on Home screen.
2. Select **Class** in the Mail Information list box on the Run Mail screen.
3. Select **Addressed Admail**.
4. Select the appropriate options (for example, Letter Carrier Presort then Delivery Facility, then Short and Long).
5. Click **OK**.
6. The Run Mail screen re-displays showing the inscription on the envelope.
7. Load the envelope and select **Start**.
8. To save the job, select the **Save As** link at the top of the screen.
9. Enter the new job name and select **OK**.

## Return address

The return address is positioned at the left edge of the envelope.

The return address option allows you to type in a return address. If you use more than one return address, save each address in a different job.

To change or add a graphic ad that is already downloaded or present on your system:

1. Ensure that the appropriate job is open and selected on the Run Mail screen
2. Select anywhere within envelope on the Run Mail screen.
3. Select the **Graphic Ad** option from the list box.

4. Select the graphic you want to replace, or select the **Green Arrow** at the top of the on-screen envelope.
  - If no graphic currently displays on the envelope, select one of the available graphic ads displayed on the Edit envelope screen. A check mark appears next to the graphic you select.
5. You can adjust the position of a graphic with the **Green Position Arrows** on the right side of the screen.
6. Press **Done** to return to the Run Mail screen.

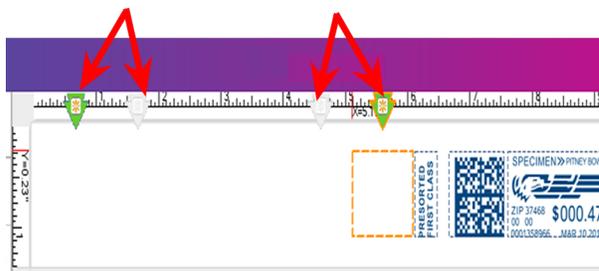
### Related topic

## Viewing available graphics

1. Select anywhere within the envelope on the Run Mail screen. You can also select the **Edit envelope** link.  
Select the Graphic Ad option from the list box on the left of the **Edit envelope** screen.
2. The graphic images are displayed in the order in which they have been downloaded, with the newest appearing first.
3. If your system has full colour capability there will be 3 colour filter buttons located directly under the image list.  
By selecting one of the filter buttons you can choose to display only those images that are in colour, mono (black), or postal ink colour. If your system has a mono and postal ink colour printer, there will only be 2 filter option buttons. Systems having only the postal ink colour printer do not have any filter option buttons since all the graphics are the approved postal colour.
4. A graphic image which has a tick in front of it has been selected for placement in the Transpromotional zone of the mailpiece.

## Adding a graphic

1. As soon as you open the Graphic Ad screen, a series of markers appear along the top of the envelope. The arrows indicate the location of the markers.



- The number of markers that appear depend on the size of the envelope or tape. A #10 envelope and has four graphic markers.
  - The markers are grouped as left justified (left edge of the envelope) or right justified (next to the indicia). The markers define the locations for the graphic images.
2. To select a graphic, choose the marker, then select the graphic from the list (a checkmark appears in the checkbox).
    - If the zone is empty, by default the right justified marker next to the indicia is automatically selected and the first graphic will appear in this location.
    - To remove the graphic, simply de-select it so that the checkmark is removed from the checkbox.
  3. Select **OK** to place the graphic on the envelope. The Run Mail screen appears with the graphic displayed on the envelope.
  4. For a #10 envelope template you can add up to four graphics: two will be right justified (2) and two will be left justified (1).



5. If you try to add an image and there is not enough room, the system will display a message telling you to either remove an existing image or change the size of the envelope.
6. To change the horizontal position of a graphic items, refer to Positioning a graphic/message.
7. If during a mail run an envelope has the maximum number of images it can accommodate and the size of the envelope decreases (for example during a WOW job), the graphics and/or messages will be dropped in a specific sequence. Refer to How markers are dropped/added for the order in which the markers are dropped.

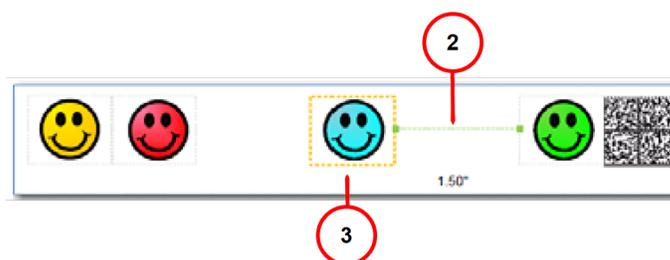
## Positioning a graphic/message

You can move a graphic horizontally within the Transpromotional zone using the position buttons. These buttons allow you to move the graphic to the left or right. The allowed distance you can move a graphic depends on the envelope/tape size and the number of graphics already in the zone. If you attempt to move the graphic more than the maximum allowed, a warning is displayed.

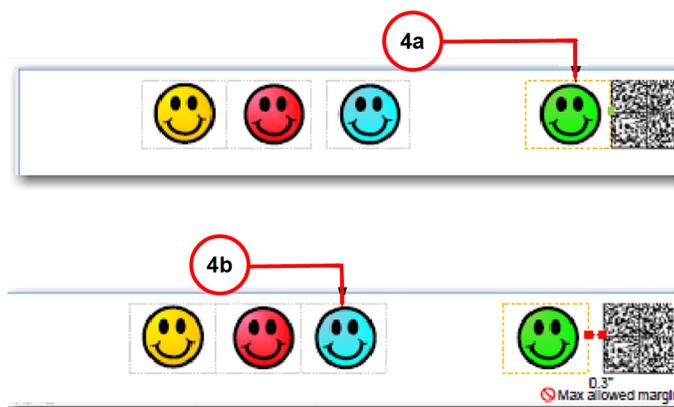
1. When you select an image, a border appears around it and a dot appears on the left or right depending on whether it is left or right justified.
2. Select the graphic you want to move (1). For this example, we select the right justified blue graphic.



- You can move the graphic to the left either by tapping the Margin button and entering the distance, or by tapping the left position button - a single tap moves the image 1 mm. Press and hold for more than two seconds and the distance increments 0.5 inch (12.7 mm) 12 mm every additional second. If you exceed the allowable distance, the green inter-element link (see 2 in the diagram below) turns from green to red. In the example here the right margin for the blue element is now at 38 mm. Refer to 3 in the diagram below.



- The graphics within a group (right-justified or left-justified) are connected to one another so that moving one also affects the other. In the example below, moving the right justified green graphic (see 4a) also moves the blue graphic (see 4b) since they are both right justified (note that this has no affect on the left justified yellow and red graphics).



## How markers are added or dropped

The diagram below shows the default order (1 = last, 2 = first) in which non-postal elements (graphic images, text messages, return addresses) are dropped from the Transpromotional zone if the envelope size changes during a WOW mail run and an element(s) will not fit. The postal elements are restored in the reverse order.



You can specify which images or messages you do not want dropped. The default drop-order will remain the same but the image or message you select will be skipped during the drop. Refer to Changing the image/message drop order.

### Notes on drop order:

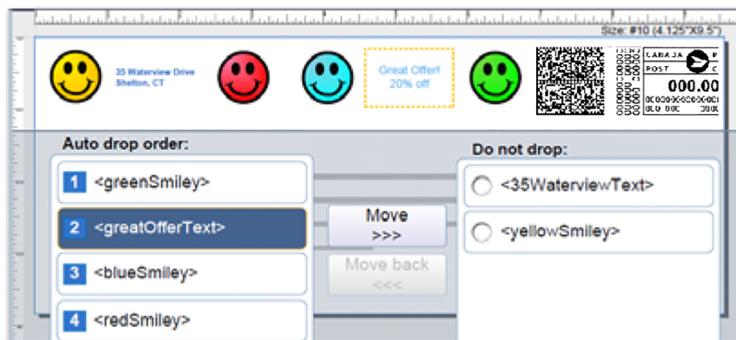
- When a right justified element is dropped, the other right justified images shift to the right. The distance of the shift is equal to the size of the image plus its margin.
- When a left justified element is dropped, the other left justified images do not shift or change position.

## Changing the image/message drop order

To select an image/message you do not want deleted during a WOW mail run:

1. Select anywhere within the envelope on the Run Mail screen. You can also select the **Edit envelope** link.
2. Select the **Print element drop order** option from the list box on the left of the Edit envelope screen.

- The graphics and messages currently in the Transpromotional zone are listed in the left Auto drop order list box.



- Select the image/message from the Auto drop order list and then select **Move**. This image/message now appears in the Do not drop list in the top position on the right.
- Select **OK**.
- To remove an image from the 'Do not drop' list, select it and then select **Move back**.

## Managing your images/text messages

The Manage List link appears when you view your graphic or text images within the Edit Envelope screen.

They are listed in the order in which they were downloaded and according to the colour filter you select in the Graphic Ad or Text Message screen (colour, black, postal ink). You can hide an item so that it doesn't appear as an option for the envelope or tape.

## MyGraphics™ Designer

Your Connect+ Series, SendPro P system has the flexibility to print customised messages and graphics (Graphic Ads, Text Messages, Return Addresses) on the blank portion of your envelope while it's printing postage. The MyGraphics™ Designer tool from Pitney Bowes provides a simple way to create and transfer customised Graphic Ads to your mailing system.

- You must run MyGraphics Designer on a PC separate from your mailing system.
- MyGraphics Designer can be accessed via Your Account. This is located within the Sign In option of pitneybowes.com

- The colour of a graphic printed by your mailing system is based on the printer in the system and the colour of the initial image.

My Graphics Designer can use the following graphic formats:

- **bmp** (bitmap) - versatile format created from Windows and Adobe products
- **jpg** - format best used for photographic images
- **gif** - format best used for internet images that have flat colors
- **png** - format best used for internet images with lossless data compression

Once you create a graphic and upload it using MyGraphics Designer, you can download it onto your mailing system by checking for rates and updates.

## Postal inscriptions

Postal inscriptions are text printed on the envelope to identify to Canada Post which class of service should be used. Inscriptions:

- can be selected automatically by the system when the class is selected in Run Mail
- can be specified manually if you wish to print a specific inscription
- can be set to not print

**Note:** Postal Inscriptions are only available in certain countries.

1. Ensure that the appropriate job is open and selected on the Run Mail screen.
2. Select anywhere within the envelope on the Run Mail screen. You can also select the **Edit envelope** link.
3. Select the **Postal Inscription** option from the list box on the left of the Edit envelope screen.
4. If you have selected a class that requires an inscription the option **Based on mailing class and services...** is automatically selected. You cannot deselect a required inscription, or choose a different inscription.
5. To select an inscription manually, select the option for **Select from list** and choose one of the available inscriptions.
6. If you do not want any inscription to appear, select **Don't print postal inscription**.
7. Select **OK** when done.

## Changing or adding an inscription

**Note:** Inscriptions are only available in certain countries.

1. Ensure that the appropriate job is open and selected on the Run Mail screen.
2. Select anywhere within the envelope on the Run Mail screen. You can also select the **Edit envelope** link.
3. Select the **Postal Inscription** option from the list box on the left of the Edit envelope screen.
4. If you have selected a class that requires an inscription the option **Based on mailing class and services...** is automatically selected. You cannot deselect a required inscription, or choose a different inscription.
5. To select an inscription manually, select the option for **Select from list** and choose one of the available inscriptions.
6. If you do not want any inscription to appear, select **Don't print postal inscription**.
7. Select **OK** when done.

## Adding or changing a text message or return address

Add a customized text message to print a return address or your own personalized message. You can store up to 20 text messages.

Your message must comply with the postal rules for your country.

1. Select **Edit Envelope** from the **Run Mail** screen.
2. Select **Text messages and Return addresses**.
3. Select **New** to create a new text message.
4. Enter your text message.
5. Select **Save**.
6. Name the text message.
7. Select **OK**.
8. Select one of the available messages. A check mark box appears next to the selected message.
9. To change the position of the message, use the **Green Position Arrows** on the right side of the screen.

10. To remove the message or return address, deselect it.
11. Select **OK**.

## Viewing available messages / return addresses

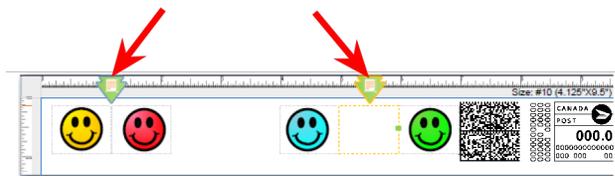
1. Select anywhere within the envelope on the Run Mail screen. You can also select the **Edit envelope** link.
2. Select the **Text message and Return address** option from the list box on the left of the Edit envelope screen.
3. The messages are displayed in the order in which they have been created, with the newest appearing first.
4. If your system has full color capability there will be 3 colour filter buttons located directly under the image list.

By selecting one of the filter buttons you can choose to display only those messages that are in colour, mono (black), or postal ink. If your system has a mono and postal ink printer, there will only be 2 filter option buttons. Systems having only the postal ink printer do not have any filter option buttons since all the messages / addresses are in approved postal ink.

5. A message / address which has a tick in front of it has been selected for placement in the promotional zone of the mailpiece.

## Adding a message or return address

1. As soon as you open the text message screen, text message markers appears at the top of the envelope. The number of markers depend on the size of the envelope or tape. The circles indicate the location of the markers.



2. The example shown here corresponds to a # 10 envelope and has two text message markers. If graphic images are present, the markers are positioned between the graphic markers as shown here.

3. As with graphic markers, the text markers are left justified or right justified. The markers define the locations for return addresses or other text messages.
4. The methods for choosing a text message or a return address are the same as for graphic images. Refer to Adding a graphic.
5. To create a new message, refer to Creating a new message or return address.

## Creating a new message or return address

1. Select anywhere within the envelope on the Run Mail screen. You can also select the **Edit envelope** link.
2. Select the **Text message & Return address** option from the list box on the left of the Edit envelope screen.
3. Select **New** link at the bottom of the screen. Enter the message in the dialogue box. If you use the on-screen keyboard to enter the text, select **Close** and then **Save** when complete.

**Note:** The number of characters per line depends on the size of the font (see step 5). For Arial 10 point, the limit is 100 characters per line.

4. Type in the name of the Text message when prompted and then select **OK**.
5. To edit the text message, select **Manage**.
6. To change the font of the text message, select **Format**.
  - a. The font tab allows you to select the font (eg., Arial), style (bold, italic, underline), size and font colour.
  - b. For font colour, you can select black, postal red, postal ink, choose from a standard set of colours, or create a custom colour.
    - Standard colours: select from a set of colors that correspond to a particular pre-set RGB value.
    - Custom colours: Create a customized RGB colour by typing in colour values between 0 and 255 (where 0 removes all traces of the colour and 255 adds the colour completely) in the RGB fields.
    - Alternatively, you can drag the cross hair in the colour spectrum box and slide the pointer bar up and down the saturation selection bar. As you make adjustments the corresponding RGB values update and display on the screen.
7. To adjust the horizontal or vertical alignment of the message or return address, select the **Text Block** tab and select the appropriate alignment options.

8. To remove the message / return address from the envelope, deselect it.

**Note:** If you deselect a message, in order for the message to reappear in the list, you must select the colour filter button that corresponds to the colour of the message. For example, if you created the message in postal ink, select the postal ink filter button to redisplay all of the messages done in postal ink.

## Changing envelope size

To change the type of envelope and/or the items to include on the envelope for printing follow the steps here.

1. Ensure that the appropriate job is open and selected on the Run Mail screen.
2. Select anywhere within the envelope on the Run Mail screen.
3. Select the **Envelope size** option from the list box on the left of the Edit envelope screen.
4. Select the appropriate size (#10, Flat, Post Card, Custom).
5. Select **OK**.

## Changing the envelope print area

You can adjust the distance of the graphic from the top edge of the envelope or from the left or right sides of the envelope. By adjusting the top vertical edge, you move all of the elements (indicia, address, graphics or inscriptions) on the envelope up or down.

Adjusting the distance from the right side of the envelope moves all right-justified elements to the left or right. These elements include any item on the left side of the indicia, for example, a graphic ad, inscription or text message.

1. Ensure that the appropriate job is open and selected on the Run Mail screen.
2. Select anywhere within the envelope on the Run Mail screen. You can also select the **Edit envelope** link.
3. Select the **Print position** option from the list box on the left of the Edit envelope screen.

4. Set the offset value from the top edge of the envelope. The offset range from the top of the envelope is 0.24 to 0.51 inch (6 to 13 mm).
  - a. Select the + or - button once to increase/decrease the value by 1 mm.
  - b. To continue increasing/decreasing the value hold the + or - button for at least 2 seconds. For each second you hold the button, the value increases/decreases by 10 mm.
5. Set the offset value from the right edge and left edge of the envelope using the same method used for setting the top edge offset. The right margin can only be set at 8 mm.
6. The left margin offset range is 0 to 13 mm.

**Note:** The offset values are dependent on the country.

7. Select **OK** when done.

# 5 - PitneyShip Pro

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## What is PitneyShip Pro?

You can use your Connect+ Series, SendPro P meter to access the PitneyShip Pro shipping application.

The application walks you through the process of creating a shipping label for your shipments. The easy to follow process offers you various carrier services which enables you to allow you decide the best way to send your shipment.

To speed up and simplify the process of preparing and printing a shipping label you can also make use of features such as the Address Book and History.

The Address Book allows you to store an unlimited number of addresses and these can be easily accessed as you create a shipping label. The History feature provides you with a complete list of all your shipments that you have sent. You can view the status and track your shipment as it follows the carriers mailstream.

## Getting started with PitneyShip Pro

Once you have placed an order for the PitneyShip Pro shipping feature, you will receive a welcome email instructing you how to obtain your login and password details.

Select any of the buttons within the Shipping tile in the Home screen to access the login screen. Your login details should be the same as your Pitney Bowes account. If you do not receive or mislay the welcome email please contact your local Pitney Bowes office for further support.

## Adding postage to your PitneyShip Pro account

There is no option to add or view your postage balance in PitneyShip Pro. Instead, PitneyShip Pro will charge each transaction to:

- Your Pitney Works account
- Your Canada Post account

You can sign up for a Pitney Works account by following the directions about Pitney Works on the [Pitney Bowes](#) website. Search for **What is Pitney Works**. Once you have a Pitney Works account, you can view and pay your Pitney Works bills using one of the payment options described there.

You can sign up for a Canada Post account on the Canada Post website. When using a Canada Post account, your SendPro transactions will be applied to your Canada Post account. Log into your Canada Post account to view and pay your Canada Post bill.

## Tracking a shipment

You track a shipment using its tracking number, a unique number assigned to each shipping label you create. The tracking number is used to electronically track the package as it moves through its carrier's mailstream.

1. View all tracking numbers:
  - a. Select **History** in the Shipping tile on the Home screen.
  - b. Locate the tracking number in the list of shipments. If the shipment does not show a tracking number in the tracking number column, the shipment does not include tracking. Refer to the Canada Post Postal Guide for tracking requirements. To view the tracking event details for that shipment, click on the **View** link or **>** arrow in the left of the column list, next to the shipment's date, to reveal the shipment's details.
2. Search for a tracking number:
  - a. Look for the search box on the History screen.
  - b. Enter the tracking number in the field.
  - c. The system automatically narrows down the list of shipments based on the information you provide.

## Adding an address to the Address Book

Use the Address Book on your meter to add single addresses. Use PitneyShip Pro to import multiple addresses.

1. Select **Address Book** in the Shipping tile on the Home screen.
2. Select either the **Recipient** or **Sender** tab (whichever is appropriate).
3. Click on the **+Add New** button. You can select an international country by selecting the drop down option.

4. Enter the details for the new address in the fields provided on the screen.
5. Click **Save** when done. You may be prompted to verify the address.
6. The new address is added to your list of addresses.

## Changing the sender's address

You can make changes to the current sender's address, add a new sender address, or select a different sender address from the Address Book as you create a shipping label. You can also make these changes when adding an address to the Address Book.

To change the sender's address while creating a shipping label:

1. Click on the sender address in the Sender section on the left side at the top of the Choose a Recipient screen.
2. Select the appropriate option.
  - **Edit sender address** - Select this to display all the address fields. Type your changes in the appropriate field(s). If you make changes to street, city, Province, or Postal Code click on the **Confirm Address** button when done.
  - **Add new sender address** - Select this to add a new sender address. Type in the sender's address in the fields provided.
  - **View all senders** - Select to display all the available sender addresses in the address book. Click on the one you want to use. This then appears in the Sender section.

## Creating a label from an address

You can start creating a Canada Post, UPS or FedEx shipping label within the Address Book. To do this:

1. Select **Address Book** in the Shipping tile on the Home screen.
2. Select an address from either the **Recipients** list or the **Senders** list.
3. Select **Print Shipping Label** and start creating the shipping label.

## Editing or deleting an address

If you need to change or delete an address, you can do so in the Address Book.

1. Select **Address Book** in the Shipping tile on the Home screen.
2. Select **Recipients** to display the list of all recipient addresses. Select **Senders** to display the list of all sender addresses.
3. Select the address from the list.
4. You can edit or delete the selected address. The **Edit** and **Delete** button are on the right side of the screen.
  - If you select **Edit**:
    - a. The address fields are displayed in the Edit Contact screen. Make any changes necessary.
    - b. Select **Save** at the bottom of the screen.
    - c. The updated address appears in the list of addresses.
  - If you select **Delete**:
    - a. You are asked to confirm that you want to delete the address.
    - b. To delete the address, select **Delete**.

## Verifying a Canada Post address

When you enter a recipient or sender address, create a shipping label, or add an address to the Address Book in PitneyShip Pro, there is no method to ensure that the address is valid. This may cause shipments to be delayed or returned to the sender. The Canada Post website can be used to determine if an address is valid according to Canada Post.

1. Go to the Canada Post website ([www.canadapost.ca](http://www.canadapost.ca)).
2. Select **Find a Postal Code**.
3. Enter the address to see if the address is valid.
  - If the address information is not recognized as a valid mailing address, you must edit the information until it is recognized as a valid mailing address

## Voiding a shipping label

You can void the Canada Post, UPS or FedEx shipping label so that the postage will not be applied to your Pitney Works or Canada Post account. Your Pitney Works or Canada Post bill will list both your postage charges and voided shipping labels (credits). If you use a voided shipping label, the credit will be reversed and a “use of a voided label” penalty will be applied and appear on your Pitney Works or Canada Post bill.

You can cancel a UPS or FedEx shipping label so that the postage will not be applied to your invoice from UPS or FedEx.

You can cancel a label immediately after printing it or from the shipping label History screen.

## To cancel after printing

1. On the Carrier screen the message **Label Completed** appears.
2. Click the **Void Label** link next to the Label Completed message.
3. The Void Shipping Label dialog box displays. Read the information and certify that you will not be using the shipping label by selecting the check box provided.
4. Click **Yes** to cancel the label.

## To cancel the label from the History screen

1. Select **History** in the Shipping tile on the Home screen.
2. This opens the History screen.
3. Locate the Canada Post, FedEx or UPS label in the list of shipments or using the search box.
4. Click the > arrow in the left of the column list, next to the shipment's date to reveal the shipment's details. You can also open the shipment's details by clicking on the **View** link in the Status column.
5. Click **Void Label**. Read the information and certify that you will not be using the shipping label by selecting the check box provided.
6. Click **Yes** to cancel the label.

## Managing your email notifications

You can have the tracking number or shipment delivery confirmation emails sent to both recipients and senders when you create shipping labels.

**Important:** When using email notifications, make sure the recipient / sender address includes a valid email address. See [Adding an address to the Address Book](#).

The email notification feature can be enabled / disabled via the PitneyShip Pro solution. Please access the PitneyShip Pro application on your computer.

## Setting up a FedEx account

In order to use the FedEx carrier for shipping labels, you need to set up your FedEx account using PitneyShip Pro. You cannot set up a FedEx account on your meter. In your web browser, [sign in to PitneyShip Pro](#), then follow the instructions in [Setting up a FedEx account in PitneyShip Pro](#).

## Setting up a UPS account

In order to use the UPS carrier for shipping labels, you need to set up your UPS account using PitneyShip Pro. You cannot set up a UPS account on your meter. In your web browser, [sign in to PitneyShip Pro](#), then follow the instructions in [Setting up a UPS account in PitneyShip Pro](#).

## Weighing your shipment with a scale in PitneyShip Pro

When you create a shipping label you select the type of envelope or package for your shipment using the Enter Packaging Details screen.

Depending on the carrier you may be prompted to enter the weight of your shipment.

If you have an attached USB scale, place the package on your scale and click the scale button.



The weight will appear in the Weight field.

To zero your scale you can also use the blue drop down arrow if a weight greater than zero is shown when there is nothing on the scale. Ensure there is nothing on the scale before you begin.

## Adding a shipment memo in PitneyShip Pro

Once you enter all the information required to create your Canada Post, UPS or FedEx shipping label (recipient address, packaging information, carrier services you can enter up to a 40 character note in the Memo field within the Label Options screen.

This note will print on the shipping label and also will appear in the History file for the shipping label.

## Using your own packaging for Canada Post shipments

You can choose to use your own envelopes or boxes in which case you will be prompted to select the package type (box, envelope, Mailing Tube or Unpackaged) and enter the dimensions and the weight. If you have an attached USB scale, click the scale button and place the package on your scale.



The weight will appear in the Weight field. PitneyShip Pro will calculate and display the total postage required once you enter the mail class and any special services.

For detailed information on size and weight restrictions, visit the Canada Post website at [www.canadapost.ca/](http://www.canadapost.ca/).

## Using your own packaging for FedEx and UPS Canada shipments

You can use your own boxes or envelopes by selecting **My Box or Envelope** on the Enter Package Details screen while creating a FedEx or UPS shipping label.

**Note:** FedEx and UPS rate envelopes like boxes so the screen you use to enter the dimensions and weight is the same for both.

If you have an attached USB scale, click the scale button and place the package on your scale.



The weight will appear in the Weight field. PitneyShip Pro will calculate and display the total postage required once you enter the mail class and any special services.

For detailed information on size and weight restrictions, visit the FedEx or UPS Canada website.

## Creating a Canada Post shipping label

You can create a Canada Post shipping label from the Shipping tile on the Home screen or from within the Address book.

You enter the information required for creating the label in a series of screens. To continue from one screen to the next, select the down arrow on the right side of each screen. Your progress is displayed along the bottom of the screen.

1. Select **Print Shipping Label** in the Shipping tile on the Home screen. Then select the Canada Post carrier. This opens the Recipient screen.
2. If you are using Cost Accounts, select the down arrow in the Cost Account section at the top of the screen and choose a Cost Account. For more information on setting up Cost Accounts, see [Enabling cost accounts](#).
3. Enter the recipient's address using one of two methods:
  - Type in the recipient's address in the fields provided. PitneyShip Pro supports type ahead so that if the name or part of the name is already in the address book, it will display the matching address(es).
  - **Choose from Address Book** icon



You can scroll through the list of addresses or select a search option (search by full name, street etc.) by selecting the down arrow in front of the search field.

- If you are shipping to an international address, you will need an 8.5 x 11 printer. If you are shipping to the United States, you are prompted to either verify or edit the recipient address.
  - If the shipment already has the address written on it, or if you are using an address label, check on the check box for **Use Postal Code Only** and enter the Postal Code. This option is only available for destinations in Canada.
4. To automatically email the tracking number to recipients or senders (or both) when you print the shipping label, select the check box in front of Email the tracking number. For information on the setting up the automatic email notification options, see [Managing email notification in PitneyShip Pro](#).
  5. Enter the shipping package information in the Enter Packaging Details screen.
    - You can also choose to use your own envelopes or boxes in which case you are prompted to select the package type (box, envelope, mailing tube, or unpackaged) and enter the dimensions and the weight. For detailed information on size and weight restrictions, visit the [Canada Post website](#).

6. If you are creating an international or military shipping label, you will be prompted to enter the required customs information in the Reason for export screen. You will need to identify the type of items (for example, gifts, documents, returned goods etc.) and provide detailed descriptions of all the items contained in your shipment. This includes where it's made, the cost, weight and total value.
7. Select the down arrow on the right side of the screen to continue and use the Service screen to select the Canada Post shipping service. Depending on the package type, you can also select a variety of additional special services. To add more services, select **Add Extra Services**.
  - When you finish selecting the shipping services and options, the Total (with taxes) for the shipping label is displayed at the bottom of the screen.
8. Select the **Print** button at the bottom of the screen directly under the Total. This opens the Label Options screen which allows you to define how you want to print the label. See [Printing a shipping label](#).
9. Depending on the service, you may need to enter the Sender and Recipient's phone number. Enter the numbers and select **Continue** to open the Label Options screen.
10. To create a new label, repeat these steps.

## Creating a Canada FedEx or UPS shipping label

You can create a Canada FedEx or UPS shipping label from the Shipping tile on the Home screen or from within the Address book.

You enter the information required for creating the label in a series of screens. To continue from one screen to the next, select the down arrow on the right side of each screen. Your progress is displayed along the bottom of the screen.

1. Select the **Print Shipping Label** button in the Shipping tile on the Home screen. Then select the FedEx or UPS carrier. This opens the Recipient screen.
2. If you are using Cost Accounts, select the down arrow in the Cost Account section at the top of the screen and select the account.
3. Enter the recipients address by entering the information in the fields provided, or by selecting the Address book icon and selecting an address from the list. If you make changes to an existing address you can save those changes by selecting **Update contact**. **Note:** If you are shipping to an international address, you will need an 8.5 x 11 printer. If you are shipping to the United States, you are prompted to either verify or edit the recipient address.



4. Select **Residential** or **Commercial Address** from the drop-down on the Recipient screen. The cost for a residential address is more because it includes an additional Residential Surcharge.

5. To automatically email the tracking number to recipients or senders select the check box in front of **Email the tracking number**.
6. Enter the shipping package information in the Enter Packaging Details screen. You can select a standard rate FedEx or UPS envelope, box, pack or tube. To view the dimensions and the maximum allowable weight for each option, position the cursor over the option.
7. For FedEx or UPS packages, enter the weight in the field provided. If you have an attached scale, place the package on the scale and the weight will appear in the Weight field. If you are using your own packaging, enter the package dimensions and weight in the fields provided. If you have an attached scale, place the package on the scale and the weight will appear in the Weight field. **Note:** FedEx and UPS rate envelopes like boxes so the screen you use to enter the dimensions and weight is the same as the one used for boxes.
8. If this is an international or military shipping label, enter the required customs information. You need to identify the types of items (for example, gifts, documents, returned goods etc.) and provide detailed descriptions of all the items contained in your shipment. This includes where it's made, the cost, weight and total value.
9. Select one of the service delivery options in the Service screen. Note: The amount displayed for each service option is less than the Total displayed in the progress section at the bottom of the screen. The service option amount does not include the taxes. If you want to add additional services like Delivery Confirmation, select **Add Extra Services**.
10. Select **Print** at the bottom of the screen.
11. Depending on the type of service you selected, you may be required to enter the Sender and Recipient phone number. Select **Continue**.
12. Use the Label Options screen. Refer to [Printing a shipping label](#) for details on the Label Options screen options.

## Printing a FedEx manifest

Use the PitneyShip Pro application on your computer to print a FedEx manifest. Use the same login and password you use for PitneyShip Pro on your Connect+ Series, SendPro P meter.

The FedEx Manifest is available from the Print menu on the [PitneyShip Pro Home page](#).

## What is a Residential Surcharge

UPS and FedEx provide delivery service to residential addresses as well as business addresses. A residential delivery is one made to a home, including a business operating out of a home. For each residential delivery, an additional charge per shipment applies.

## Creating a Canada Post return label

You can create a return label for a shipment so that the recipient can send it back to you.

You can create a Canada Post return label from a shipping label you've just printed, or from the shipping label's record on the History screen.

### To create the return label from a shipping label you've just printed

1. On the Carrier screen you will see a confirmation that the label has been printed.
2. Select the **Create Return Label** link.
3. Follow the same steps for creating a shipping label. Refer to [Creating a shipping label in PitneyShip Pro](#).

### To reprint from the History screen

1. Select **History** in the Shipping tile on the Home screen. This shows the tab for Shipments selected and displays all of your recent shipments.
2. Find your label in the list or by using the search box.
3. To reveal the shipment's details click the **View** link or the > arrow in the left of the column list, next to the shipment's date.
4. Select the **Create Return Label** button.
5. Follow the same steps for creating a shipping label. See [Creating a shipping label in PitneyShip Pro](#).

## Printing a shipping label

Once you enter all the information required to create your current shipping label (recipient address, packaging information, services), you use the Label Options screen to define your print options. You can also define the values for these printing options for all the shipping labels you create by selecting **Settings** on the Shipping tile on the Home screen. See [Setting up shipping label printing defaults](#).

- To print a receipt along with the label, select the check box for **Print a receipt with the shipping label**. You can select this option only if you are printing on 8 ½" x 11" printers.

- Select the down arrow in the **Choose Format** field and then select either 4" x 6" roll or 8.5" x 11" paper. Ensure the correct size label is selected. Once the shipping label is printed, the size cannot be changed.
- Use the magnifier to zoom and see the address as it will actually print on the label.
- You can select **Print Sample** to ensure the label aligns correctly when you print. When the sample label appears in a new tab, print it and then check the alignment.
- To add a note about this shipment, enter the information in the Memo field. You can enter up to 50 characters. It will be available in your history file for all carriers.

## Print the label

Select **Print**. Once the shipping label prints, the message Label Completed along with the Total cost appears on the Carrier screen.

A series of options appear next to the Total cost. The options available depend on which carrier you selected for the shipping label.

- Reprint this Canada Post Label - see [Reprinting a Canada Post shipping label](#).
- Reprint this FedEx or UPS Label - see [Reprinting a FedEx or UPS shipping label](#).
- Create a Return Label (Canada Post Only) - see [Creating a Canada Post return label](#).
- Void a Canada Post, FedEx or UPS Label - see [Voiding a shipping label](#).

## Setting up shipping label printing defaults

To choose the print settings you'd like to automatically apply to all new labels, select **Settings** in the Shipping tile on the Home screen. The Printing Defaults screen opens.

On this screen, check or uncheck the checkboxes to:

- Show or hide the shipping cost on the printed label
- Print a receipt with the shipping label.

Select a default label type (Plain Paper – 8 ½ x 11 or Roll - 4 x 6) from the **Choose Format** drop-down menu.

## Reprinting a Canada Post shipping label

If a label does not print correctly, you can print it again.

You can reprint a shipping label three times within 24 hours after printing it the first time, or from the shipping label's record on the History screen.

## To reprint a shipping label you've just printed

1. On the Carrier screen you will see the message **Label Completed**. Click the **Reprint This Label** link next to the Label Completed message.
2. You'll see a Reprint Label dialog box with some conditions. If you agree to them, check the check box.
3. Click **Reprint**.

## To reprint from the History screen

1. Select **History** in the Shipping tile on the Home screen. All of your recent shipments appear.
2. Find your label in the list or by using the search box.
3. To reveal the shipment's details click the **View** link or the > arrow in the left of the column list, next to the shipment's date. You'll see a Reprint Label dialog box with some conditions. If you agree to them, check the check box.
4. Click the **Reprint** button to reprint the label.

## Reprinting a FedEx or UPS shipping label

If a label does not print correctly, you can print it again.

You can reprint a FedEx or UPS shipping label once within 24 hours after printing it the first time.

## To reprint a shipping label you've just printed

1. On the Carrier screen you will see the message Label Completed . Click **Reprint This Label** next to the Label Completed message.
2. You'll see a Reprint Label dialog box with some conditions. If you agree to them, check the check box.
3. Click **Reprint**.

## To reprint from the History screen

1. Select **History** in the Shipping tile on the Home screen.
2. This opens the History screen displaying all of your recent shipments. Find your label in the list or by using the search box.
3. To reveal the shipment's details click the **View** link or the **>** arrow in the left of the column list, next to the shipment's date. You can also open the shipment's details by clicking on the **View** link in the Status column.
4. You'll see a Reprint Label dialog box with some conditions. If you agree to them, check the check box.
5. Click **Reprint**.

## Measuring your shipment dimensions in PitneyShip Pro

When you create a shipping label you select the type of envelope or package for your shipment using the Enter Packaging Details screen. See [Creating a shipping label](#) for more information.

- Each carrier provides a list of carrier-specific packages (box, envelope, mailing tube, or unpackaged) from which you can choose. For detailed information on size and weight restrictions, visit the Canada Post website at [www.canadapost.ca/](http://www.canadapost.ca/).

## Enabling Cost Accounts

Cost Accounts help you keep track of where you're spending your money on postage by allowing you to assign shipping label costs. You can also assign a Cost Account for postage refills.

The Cost Accounts feature is enabled via the PitneyShip Pro solution. Please access the PitneyShip Pro application on your computer where you can also view Cost Accounts information.

## Searching for a shipment in PitneyShip Pro

Use the History feature to search for shipments.

1. Select **History** in the Shipping tile on the home screen. The History screen displays all shipments.
  - The Shipments screen provides a line-item summary of all the shipments. Each line represents a single shipment and includes the date, recipient, carrier, shipping info (mail class), tracking number, status, amount (postage paid) and user (who created the label).
  - By default, all of your shipments are listed by date, the latest date appearing first in the list. The Date column corresponds to the date you created the label.
  - To change between ascending and descending sorting for a label in the shipping list, click on the appropriate column title. For example, to change the sorting for the carrier, click on the **Carrier** column title.
2. You can also limit or refine your search:
  - Click **All Shipments** button and select one of the available filters (for example, search for all insured shipments).
  - If you have the tracking number for a shipment, enter it in the search field.
  - You can also search by a range of dates by selecting the **Calendar** button and choosing the appropriate option.
  - You can also search using the recipient's name, or company, or parts of the address.
3. Click the **View** button or > arrow in the left of the column list to reveal complete details for a shipping label (recipient's and sender's address, mail class and special services, Cost Account, total cost, etc).

# 6 - Accounting

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## All about Accounting

The Connect+ Series, SendPro P is designed with an integrated accounting capability that specializes in single meter sites. You can use the accounting feature to track and account for postage used by departments or individuals within your organization.

The accounting feature helps you to understand how your postage is spent and to find cost-saving opportunities. You can charge postage back to departments or clients, apply surcharges to recover mailing costs and report postage spend data over flexible time periods.

In addition, the accounting feature allows you to review the characteristics of your mailings to see if they qualify for postal discounts.

The standard accounting package allows you to create up to 100 accounts and is available on all mailing and shipping systems. You can purchase additional accounts, allowing you to create up to 3000 accounts.

If your mailing and shipping system uses Business Manager accounting, all account and transaction management functions take place at the Business Manager Host PC. Refer to the help file provided with the Business Manager application for more information.

### Using a multi-level account structure

The accounting structure is based on three levels: account, sub account and sub sub account. Your account names can contain up to 75 characters for each level plus separators (227 characters total).

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.

- **Account:** When you create a top level account, you can charge funds and pieces to that account. This is the account charged for postage because it does not have any subordinate (sub or sub sub) accounts.

Example:

Account - **Engineering**

- **Sub account:** If you create sub accounts for a top level account, they become the lowest level in the account hierarchy and identify the departments that are charged for postage.

Example:

Account - Engineering, Sub account - **Software**

Account - Engineering, Sub account - **Industrial Design**

- **Sub sub account:** If you create sub sub accounts for sub accounts, the sub sub accounts become the lowest level in the account hierarchy and identify the departments that are charged for postage.

Example:

Account - Engineering, Sub account - Software, Sub sub account - **Software Testing**

Account - Engineering, Sub account - Software, Sub sub account - **Software Design**

Account - Engineering, Sub account - Industrial Design, Sub sub account - **Graphics and Layout**

Account - Engineering, Sub account - Industrial Design, Sub sub account - **User Friendly Testing**

When multiple account levels are created, the accounts are linked (account-sub account, or account-sub account-sub sub account). They become a set and are treated as one separate account, with one account number and one password. The top level account number and password are rolled down to the first sub account that is created. When you add a second sub account to this top level account, you create a new linked set of accounts with a different account number and password.

**Note:** Only the lowest level of the account hierarchy is chargeable. This means that transactions can only be posted to that account.

## Account attributes

When you create accounts, you can assign attributes to each top level account, sub account, and sub sub account.

- **Account name:** This can be any name you assign to an account, sub account or sub sub account. You must assign a name to each account, sub account and sub sub account you create. For information on the types of characters that can be used in account names, refer to Acceptable Special Characters for Account Names.
- **Code:** This is a unique code that you can assign to identify the account, sub account or sub sub account. It allows you to find a particular account with ease. You must assign a code to each account, sub account and sub sub account you create.
- **Description:** If necessary, you can enter a description for each account, sub account, and sub sub account. The account description can contain up to 150 characters.
- **Status:** Once you have added an account to the system, you can set the account active or inactive. Active status is the default setting for all accounts. If you have an account that you no longer wish to use, you can set the status to inactive. The inactive account will remain on the system, but you will not be able to process transactions against it.
- **Account password:** You can create a password to restrict access to accounts, sub accounts and sub sub accounts. If an account is password-protected, you must type the password to edit or process mail against the account. Passwords are case sensitive, can be alphanumeric and must be four characters in length. Account passwords must be turned on before they can be added to accounts.

## Acceptable special characters for account names

The tables below show which special characters are allowed in account names within the various accounting systems.

System	~	`	!	@	#	\$	%
Budget Manager			x	x	x	x	x
Business Manager				x	x	x	
PC Transfer Utility			x		x	x	x
Connect+ Series, SendPro P			x	x	x	x	x

System	^	&	*	(	)	_	-
Budget Manager			x	x	x	x	
Business Manager			x	x	x	x	

System	^	&	*	(	)	_	-
PC Transfer Utility			x	x	x	x	
Connect+ Series, SendPro P			x	x	x	x	

System	+	=	\		{	}	[
Budget Manager	x						
Business Manager	x						
PC Transfer Utility	x						
Connect+ Series, SendPro P	x						

System	]	"	'	:	;	?	/
Budget Manager			x	x		x	x
Business Manager				x			x
PC Transfer Utility			x	x		x	x
Connect+ Series, SendPro P				x		x	x

System	,	.	<	>	0-9	a-z	A-Z
Budget Manager	x				x	x	x
Business Manager					x	x	x
PC Transfer Utility	x	x			x	x	x
Connect+ Series, SendPro P	x	x			x	x	x

## Creating, editing or deleting an account

You build your accounting structure by creating an account, creating a sub account and creating a sub sub account on the mailing system.

Once you have created your account structure, you may want to change account attributes such as the account name, code, description, status or password by editing the account on the mailing system.

If you want to remove an account and its data, you can delete the account on the mailing system.

You can create, edit or delete an account in two ways:

- by selecting the **Manage Accounts** button in the Mailing tile on the Home screen, or
- by selecting **Account** on the Run Mail screen and then selecting **Options**

**Note:** If users are enabled on your system, supervisor access rights are required to create, edit or delete an account.

## Creating an account

You build your accounting structure by creating an account, creating a sub account and creating a sub sub account on the mailing system.

**Note:** If users are enabled on your system, this feature is only available to users with supervisor access rights. If you are using Business Manager accounting, this feature is available to all users.

Follow these steps to create an account:

1. Select **Manage Accounts** under Mailing on the Home screen.
2. Select **Create new account**.
3. If there are existing accounts on the system, you get prompted to create a new account or add a sub account. Select **Create new account**.
4. Select the **Account name** field. Enter the account name, and then select **OK**.

5. Select the **Code** field. Enter the code for the account and select **OK**.
6. (Optional) Select the **Description** field. Enter the description for the account, and then select **OK**.
7. Ensure the status is set to **Active**.
8. If you want to password protect this account, select the **Password** field. Account passwords must be turned on to password protect an account.
  - a. Enter the password and select **OK**.
  - b. Re-enter the password to confirm, and then select **OK**.
9. Select **OK**.
10. A dialog box appears to indicate that the account has been created.
  - Select **Create another new account** if you want to create another account.
  - Select **Add a sub account to this account** if you want to create a sub account for this account.
  - Select **Continue**.
  - Select the **Home** button to return to the Home screen.

**Important:**

- Once an account has been created in **Manage Accounts**, the only time the account Name or Code can be edited, or the account can be deleted, is before any transactions get posted against the Account. Once transactions get posted against an account, the Name or Code cannot be edited. The account cannot be deleted, only made inactive.
- Account names and codes cannot be reused, even if the account is inactive.

## Creating a Sub Account or Sub Sub Account

Sub accounts and sub sub accounts are an optional feature.

**Note:** If users are enabled on your system, this feature is only available to users with supervisor access rights. If you are using Business Manager accounting, this feature is available to all users.

1. You can create an account in two ways:
  - by selecting the **Manage Accounts** button in the Mailing tile on the Home screen, or
  - by selecting **Account** on the Run Mail screen, selecting **Options** and then **Add sub account to existing account**.

2. Select **Create new account**.
  - a. When prompted, select **Add sub account to existing account**.
  - b. Select the appropriate account and then select **OK**.
3. Select the **Sub** or **Sub sub account name** field. Type in the name and then select **OK**.
4. Select the **Code** field. Type in the code for the account and select **OK**.
5. If necessary, select the **Description** field. Type in the description for the account and select **OK**.
6. Ensure the status is set to **Active**.
7. If you want to password protect this sub or sub account, select the **Password** field.

**Note:** Account passwords must be turned on to password protect an account.

- a. Type in the password and select **OK**.
  - b. Re-type the password to confirm and select **OK**.
8. Select **OK**.
9. A dialog box appears indicating the sub or sub sub account as been created.
  - Select **Create another new account** if you want to create a new top-level account.
  - Select the **Add another new sub account to this account** if you want to create another sub or sub sub account for this account.
  - Select **Add a sub sub account to this sub account** if you have created a sub account and want to add a sub sub account to it.
  - Select **Done** twice to return to the Home screen.

## Changing the account status to inactive

When you change the account status to inactive, the account can not be selected when running mail.

**Note:** If users are enabled on your system, this feature is only available to users with supervisor access rights. If you are using Business Manager accounting, this feature is available to all users.

1. Select the **Manage Accounts** button in the Mailing tile on the Home screen.
2. Select **Edit account**.

3. Select the account you want to make inactive and then select **OK**. The Edit Account screen displays.
4. Select the **Inactive** button in the Status area.
5. Select **OK**.
6. When you change the status of an account the status change applies to all sub accounts and/or sub sub accounts. If prompted to apply the change of status of multiple accounts, select **Yes, apply to all**.
7. Select **Done** to return to the Home screen.

## Editing an account

You can view or edit the account name, code, description, status or password for all of the accounts and account levels on your system.

**Note:** If users are enabled on your system, this feature is only available to users with supervisor access rights. If you are using Business Manager accounting, this feature is available to all users.

Follow these steps to edit an account:

1. Select **Manage Accounts** under Mailing on the Home screen.
2. Select **Edit account**.
3. Select the account you want to edit, and then select **OK**.
4. Select the account attribute you want to edit.
  - **Account, Sub account or Sub sub account name:** Select this option to make changes to the name of the account you selected.  
**Important:** Account names cannot be reused, even if the account is inactive.
  - **Code:** Select this option to change the code you assigned to the account.  
**Important:** Account codes cannot be reused, even if the account is inactive.
  - **Description:** Select this option to edit the account description.
  - **Status:** Select the appropriate option to change the status (active or inactive) of the account.  
**Important:** When you change the status of an account the status change applies to all sub accounts and/or sub sub accounts. If prompted to apply the change of status of multiple accounts, select **Yes, apply to all**.
  - **Password:** Select this option to password protect an account, or to edit the existing password.  
**Important:** Account passwords must be turned on to password protect an account.

5. Enter the appropriate information and select **OK**.
6. Select **OK** once you finish editing the account information.
7. Select **Done** to return to the Home screen.

## Deleting an account

When you delete an account, sub account or sub sub account, you remove its data completely. That data is then unrecoverable. Make sure you do not need the account's data before you delete the account. Once you delete an account, the data cannot be retrieved.

If you have already charged transactions to an existing account you cannot delete the account. To prevent users from charging transactions against this account, set the account status to inactive.

**Note:** If users are enabled on your system, this feature is only available to users with supervisor access rights. If you are using Business Manager accounting, this feature is available to all users.

Follow these steps to delete an account:

1. Select **Manage Accounts** under Mailing on the Home screen.
2. Select **Delete account**.
3. Select the account, sub account or sub sub account you want to delete, and select **OK**.
4. A dialog box appears indicating which accounts get deleted:
  - If there are lower level sub accounts or sub sub accounts related to your selection, Select **Yes, delete accounts** to delete all account levels.
  - If this is a single level account, or the lowest account level, select **Yes, delete account**.
5. A dialog box confirms the account deletion(s). Select **OK**.
6. Select **Cancel** to return to the main Manage Accounts screen.
7. Select **Done** to return to the Home screen.

## Turning account passwords on and off

You can protect each account from unauthorized access by turning account passwords on. If account passwords are on, you will be able to add them when creating accounts.

Use of account passwords requires that you first create a user with supervisor access rights. This allows the supervisor to maintain accounting setup information and prevent unauthorized access. If you attempt to create an account password before creating a user with supervisor access rights, the system will prompt you to create a supervisor password.

**Note:** If users are enabled on your system, this feature is only available to users with supervisor access rights. If you are using Business Manager accounting, this feature is available to all users.

To turn account passwords on or off:

1. Select the **Manage Accounts** button in the Mailing tile on the Home screen.
2. If you want to turn account passwords on:
  - a. Select **Turn account passwords on....**
  - b. Select **Yes, turn account passwords on.**
  - c. Select **OK.**
3. If you want to turn account passwords off:
  - a. Select **Turn account passwords off....**
  - b. Select **Yes, turn account passwords off.**
  - c. Select **OK.**
4. Select **Done** to return to the Home screen.

## Accounting options when running mail

The following accounting options are available when you select an account while running mail.

- Creating a new account
- Adding sub account to selected account
- Editing the selected account
- Deleting the selected account
- Choosing columns
- Managing account search criteria
- Viewing unlocked accounts only

**Note:** If users are enabled on your system, supervisor access rights are required to create, edit or delete an account.

## Selecting an account while running mail

If your system uses accounting, you must select an account in order to run mail. Follow the steps below if the selected job on the Run Mail screen does not contain an account, or if you want to select a different account.

1. Ensure that the appropriate job is open and selected on the Run Mail screen.
2. Select the **Accounts** button in the Mail Information list box. The Select Account screen displays. All of the accounts on your system are listed on this screen.
3. Select the appropriate account and then select **OK**.

**Note:** A padlock icon indicates that an account is locked. If you select a locked account, you will be prompted to type in the account password.

4. The system returns to the Run Mail screen. You are now ready to process mail against the selected account. If you want to include the account as a permanent part of the job, save your changes.

## Changing account search criteria

The Manage account search criteria option allows you to change the account search settings on your system.

1. On the Run Mail screen, select the **Accounts** in the Mail Information list box. The Select Account screen displays.
2. Select the **Options** button.
3. Select **Manage account search criteria...** The Account search criteria dialog displays.

4. Select the appropriate search options in the Search by: list.
  - Account Name
  - Account Code
  - Account description
5. Select **OK** when you are done making your changes.

## Choosing the columns that appear when viewing accounts

If your system uses accounting, you can select the columns of information you want to appear on the Select Accounts screen, and modify the order in which they appear.

**Note:** The Account name, Sub account name, and Sub sub account name columns cannot be removed or reordered.

1. On the Run Mail screen, select **Accounts** in the Mail Information list box. The Select Account screen displays.
2. Select the **Options** button.
3. Select **Choose columns...** The Choose Columns screen displays.
4. To add a column to the Select Accounts screen:
  - a. Select a column in the **Available columns:** list.
  - b. Select the **Add** button.
5. To remove a column from the Select Accounts screen:
  - a. Select a column in the **Show these columns in this order:** list.
  - b. Select the **Remove** button.
6. To change the order of the columns on the Select Accounts screen:
  - a. Select a column in the **Show these columns in this order:** list.
  - b. Use the **Move** buttons to move the column up or down in the list.
7. Select **OK** when you are done making your changes. The Select Accounts screen displays with the new column order.

## Searching for an account

If your system uses accounting, you can use the account search field to locate an account to process mail against, or when selecting an account to edit, delete or to create a new account level.

The account search field is located on the Select Accounts screen.

1. Select the **Search** field.
2. If necessary, change the account search criteria.
3. Type in the search term. As you type, the best match is displayed in the Search Results tab.

You can use hyphens as shortcuts to search for specific accounts, sub accounts, and sub sub accounts.

- The first hyphen stands for the highest level (account).
- The second hyphen stands for the next-highest level (sub account).
- The third hyphen stand for the next-highest level (sub sub account).
- No hyphen in front of the keywords means no shortcuts are used.

The hyphen shortcut can only be used to search within columns displayed on the screen (i.e. you cannot search for a sub account if the sub account column is not present).

4. If the appropriate account is highlighted, select **OK**. If more than one account is identified as a match, select the appropriate account and then select **OK**.
5. If prompted, type in the account password and select **OK**.

## Sorting the account list

You can change the order in which accounts appear on the Select Accounts screen. You can sort by account name, account code or description.

Select the account name, code or description column heading to switch between ascending (first to last) and descending (last to first) sort order for the column.

## Viewing unlocked accounts only

Set your meter to show only unlocked accounts when viewing the account list. Unlocked accounts are accounts that do not require a password.

A padlock icon appears next to the account name in the account list if a password is assigned to the account.

1. Select **Accounts** in the Run Mail screen. The Select Account screen appears.
2. Select **Options**.

3. Select the **Show unlocked account only** Check box.
  - A check mark indicates that only unlocked accounts will appear in the account list.
  - An empty Check box indicates that all accounts will appear in the account list.
4. The meter updates the account list to correspond with the option you selected.
5. Select an account.
6. Select **OK** to return to the Run Mail screen.

## Clearing an account while running mail

If you want to clear the account you have selected while running mail, select the **End account** option on the Run Mail screen. This will remove the selected account from the Mail Information list box on the Run Mail screen. You can then select another account to process mail against.

**Note:** If the selected account is saved as part of the job, clearing the account on the Run Mail screen does not delete the account from the job. You can select Reload job at any time to restore the original job settings.

## Ending a batch

A batch is used to track the number of pieces of mail processed for each job or mail run. The batch can be cleared at the end of a run or just before starting a new run.

To end a batch, select **End Batch** on the Run Mail screen.

## All about transactions

### What is a transaction?

A transaction records the following job settings when running mail: user (if applicable), account, class/fee, job ID, Attached Scale, WEIGH-ON-THE-WAY® (W-O-W®), etc.).

If any of these properties change, then the transaction will close automatically.

**Note:** A transaction is often referred to as a batch.

Other reasons a transaction can close automatically:

- If you power up with a transaction that was not closed prior to power down.
- When you attempt to print external reports.
- When the date changes (at midnight).
- Before accounting data is uploaded to the web.
- Before a transaction is transferred.

If your system has the WEIGH-ON-THE-WAY® (W-O-W®) feature, the weight break for each piece of mail is tracked as part of the transaction. If the class changes due to auto class switching within a mail run then the system will automatically open a new transaction. As mailpieces are processed it is possible that the class will change back and forth. The system will record the mailpieces to the correct transaction if this happens. When the transaction ends then the system will store two separate transactions as part of the batch.

## Managing transactions

Once a transaction has been processed, you can view and edit it within the Manage Accounts application. In addition, you can create filters to select a group of transactions on your system for viewing and editing.

## Viewing transactions

**Note:** If users are enabled on your system, this feature is only available to users with supervisor access rights. If you are using Business Manager accounting, this feature is available to all users.

1. Select the **Manage Accounts** button in the Mailing tile on the Home screen.
2. Select **Transactions**.
3. Select **View and edit transactions**. The Filter Transaction List screen displays.

4. You can select a new filter from the Saved Filters list, or you can add or edit criterion to create a new filter. To select a saved filter:
  - a. Select **Saved Filters**.
  - b. Select a filter from the list and then select **OK**.
5. Select **View Transactions**. The Transaction List screen displays with a list of transactions that match the criterion of the filter you selected.
6. If you want to add or remove the columns of information that appear on the Select Accounts screen, or to modify the order in which they appear, select **Columns....**
7. To add a column to the Transaction List screen:
  - a. Select a column in the Available columns: list.
  - b. Select the **Add** button.
8. To remove a column from the Transaction List screen:
  - a. Select a column in the Show these columns in this order: list.
  - b. Select the **Remove** button.
9. To change the order of the columns on the Select Accounts screen:
  - a. Select a column in the **Show these columns in this order:** list.
  - b. Use the **Move** buttons to move the column up or down in the list.
10. Select **OK** when you are done making your changes. The Transaction List screen displays with the new column order.
11. If you want to view transactions using a different filter, select **Filter list...**
12. Select **Done** to return to the Transactions screen.

## Editing transactions

Follow the steps below to edit the transactions that have been processed on your system. When you edit a transaction, you are changing the account a transaction was processed against.

**Note:** If users are enabled on your system, this feature is only available to users with supervisor access rights. If you are using Business Manager accounting, this feature is available to all users.

1. Select the **Manage Accounts** button in the Mailing tile on the Home screen.
2. Select **Transactions**.

3. Select **View and edit transactions**. By default, the Filter Transaction List screen displays with the criterion from the previously selected filter. You can select a new filter from the Saved Filters list, or you can add or edit criterion to create a new filter.

To select a saved filter:

- a. Select **Saved Filters**.
  - b. Select a filter from the list and then select **Next**.
4. Select **View transactions**. The View and Edit Transactions screen displays with a list of transactions that match the criterion of the filter you selected.
  5. Select the transaction you want to edit.
  6. Select the **Actions** button on the bottom of the screen and then select **Edit transactions**. The Edit Transaction screen displays.

**Note:** You cannot edit a transaction created with a PSD (meter) that is not currently installed on your mailing and shipping system or a PSD that is inactive.

7. Select the **Account** field. The Select Account screen displays.
8. Select the appropriate account and then select **OK**.
9. Select **OK** to return to the transaction list.
10. Select **Done** to return to the Manage Accounts screen.

## Filtering the transaction list

You can view specific transactions during a certain date range or view specific account transactions by creating a transaction filter.

There are many examples of why you might want to use a filter. For example, you might want to view 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 view all the transactions that were entered for a group of accounts during the current month.

Once you create a filter, you can save it for future use.

### Filter criterion

A filter can be comprised of any or all of the following criterion.

- **Date:** This option allows you to search for transactions processed during a specific date and time range. It is required for all filters.
- **Account:** This option allows you search for transactions that have been processed against a specific account or accounts.

### Related topics

## Creating a transaction filter

Create a transaction filter to view specific transactions during a certain date range or view specific account transactions.

If you login to the meter as an operator or supervisor, this feature is only available to users with supervisor access rights. If you use Business Manager accounting, this feature is available to all users

1. Select **Manage Accounts** in the Mailing tile on the Home screen.
2. Select **Transactions**.
3. Select **View and edit transactions**. The Filter Transaction List screen appears. It shows the previously selected filter.
4. Select **Add criterion** to edit the criterion contained in the filter. The button name will vary depending upon the criteria present in the filter.

5. Add or edit the date criterion:
  - a. Select **Date**.
  - b. Select **Next**.
  - c. Select the period you want to search for transactions: custom, today, yesterday, this week, last week, current period, last period, year to date, or last fiscal year.
  - d. If you selected custom date:
    - i. Select **Period start date**. Select a date from the calendar then select **OK**.
    - ii. Select **Period end date**. Select a date from the calendar then select **OK**.
  - e. Type in the start time:
    - i. Select **Hour: Minute**. Type in the start time in HH:MM format and select **OK**.
    - ii. Select **am** or **pm**.
  - f. Type in the end time:
    - i. Select **Hour: Minute**. Type in the start time in HH:MM format and select **OK**.
    - ii. Select **am** or **pm**.
  - g. Select **OK**.

Add criterion:

- a. Select **Account**.
  - b. Select **Next**.
  - c. Select **Add Account**.
  - d. Select the accounts you want to search for transactions. A check mark indicates you chose that that account.
  - e. Select **OK**. A list of the accounts you chose appears.
    - Select **Remove** if you do not want to view transactions for a particular account.
    - Select **Remove all accounts** if you want to clear the account list and start again.
    - Select **Add accounts** to add additional accounts to the list.
  - f. Select **OK**.
6. Select **Save as** to save the filter. Type in the filter name and select **OK**.
  7. Select **View transactions** to view the transaction list with the filters applied.

## Editing a transaction filter

Edit a transaction filter when you want to change the date range or accounts within a filter.

If you login to the meter as an operator or supervisor, this feature is only available to users with supervisor access rights. If you use Business Manager accounting, this feature is available to all users

1. Select **Manage Accounts** in the Mailing tile on the Home screen.
2. Select **Transactions**.
3. Select **View and edit transactions**. The Filter Transaction List screen appears.
4. Select **Saved filters...**
5. Select the appropriate filter then select **Next**.
  - Select **Add or remove criterion...** to add criterion to the filter.
  - To modify an existing filter, select the appropriate filter and make your changes.
  - To remove existing filter criteria, select the appropriate criterion then select **Remove Criteria**. The meter returns to the Filter Transaction List screen.
6. Select **Save** to save your changes.

## Deleting a transaction filter

Make sure you do not need a transaction filter before you delete it. When you delete a transaction filter you cannot recover it.

If you login to the meter as an operator or supervisor, this feature is only available to users with supervisor access rights. If you use Business Manager accounting, this feature is available to all users

1. Select **Manage Accounts** in the Mailing tile on the Home screen.
2. Select **Transactions**.
3. Select **View and edit transactions**.
4. Select **Saved filters...**
5. Select the appropriate filter then select **Delete**.
6. Select **OK** to remove the filter from the list.
7. Select **Cancel** to return to the Filter Transaction List screen.

## All about surcharges

Surcharges allow you to add a fee to actual mail costs during the accounting and reporting process. If you set up a surcharge in the Accounts application, you are creating a global surcharge, or surcharge that will be applied to each and every transaction processed by the mailing system.

If select and edit a surcharge on the Run Mail screen, you are applying a batch surcharge, or a surcharge that is customized for a specific transaction. The batch surcharge values revert to the global surcharge settings when you close the job, reload the job, or when the batch is ended.

You can apply a surcharge per piece of mail, per transaction, and/or per transaction percentage.

- An amount per mailpiece surcharge is calculated by multiplying the number of pieces processed by the surcharge setting. This surcharge can be set anywhere from -1.00 to 1.00.
- An amount per transaction surcharge is applied to each batch (or transaction) run on the system. This surcharge can be set anywhere from -50.00 to 50.00.
- A percentage per mailpiece surcharge is calculated multiplying the postage cost of the entire batch by the percent transaction setting. This surcharge can be set anywhere from -100% to 100%.

**Note:** The currency amount entered can be either positive or a negative. A negative amount indicates a discount will be applied to the postage amount for the piece of mail or transaction. A positive amount indicates a surcharge will be applied to the postage amount for the piece of mail or transaction.

## Setting Up and Editing Global Surcharges

You can create global surcharges, or surcharges that will be applied to each and every transaction processed by your mailing system.

**Note:** If users are enabled on your system, this feature is only available to users with supervisor access rights. If you are using Business Manager accounting, this feature is available to all users.

1. Select the **Manage Accounts** button in the Mailing tile on the Home screen.
2. Select **Surcharges**.
3. Select or deselect the surcharge methods as necessary. A check mark appears in the check box adjacent to the Surcharge name if it has been selected.
4. To edit a surcharge value, select **Edit**.
  - a. Type in the appropriate value in the field provided.
    - Select an amount above zero if you want to add to the postage amount for the piece or mail or transaction.
    - Select a minus amount below zero if you want to subtract from the postage amount for the piece of mail or transaction.
  - b. Select **OK**.

5. Select **Done** to apply your changes and return to the Home screen. Please note that existing jobs will not be updated with the Global Surcharge. Only new mail run jobs will include the Global Surcharge.

## Selecting a surcharge while running mail

When you select a surcharge while running mail, it will override global surcharges on your system (if present). When you close the job, reload the job, or when the batch is ended, the system will revert to the global surcharge settings for the system.

**Note:** All three global surcharges must be selected in order for the surcharge options to appear on the Run Mail screen.

Follow the steps below if you want to add, edit or remove a surcharges from the selected job on the Run Mail screen. Before you begin, ensure that the appropriate job is open and selected on the Run Mail screen.

### Editing a surcharge

If you want to edit a specific surcharge:

1. Select the surcharge you want to edit in the Mail Information list box. The Edit surcharge dialog appears.
2. Type in the appropriate value in the field provided.
3. Select how you want the value to be applied.
  - Select **Surcharge** if you want to add to the cost of the mailpiece.
  - Select **Discount** if you want to subtract from the cost of the mailpiece.
4. Select **OK** to return to the Run Mail screen.

### Adding or removing a surcharge

If you want to add or remove a surcharge:

1. Select **Add or remove a surcharge....** The Apply Surcharges screen appears.
2. Select or deselect the surcharge methods as necessary. A check mark appears in the check box adjacent to the Surcharge name if it has been selected. If you select a surcharge, the Edit surcharge dialog appears.
  - a. Type in the appropriate value in the field provided.
  - b. Select how you want the value to be applied.
    - Select **Surcharge** if you want to add to the postage amount for the piece of mail or transaction.
    - Select **Discount** if you want to subtract from the postage amount for the piece of mail or transaction.
  - c. Select **OK**.
3. If you want to switch back to the global surcharge settings, select **Revert to global surcharge settings**.
4. Select **OK** to return to the Run Mail screen.

## All about Job IDs

If you use accounting, your mailing system has the ability to track mail runs using Job IDs. Job ID tracking allows you to track broader categories that may span multiple account names. It is commonly used for tracking expenses of projects accessed by multiple departments within the organization like client jobs or grants. These entries can be scanned or entered manually by the operator before running mail

- You can set up the system to require Job IDs in order to process mail and to automatically clear Job IDs at the end of each batch.
- Job IDs are selected on the Run Mail screen.

## Requiring and autoclearing Job IDs

You can set up the system to require Job IDs in order to process mail and to automatically clear Job IDs at the end of each batch.

**Note:** If users are enabled on your system, this feature is only available to users with supervisor access rights. If you are using Business Manager accounting, this feature is available to all users.

1. Select the **Manage Accounts** button in the Mailing tile on the Home screen.
2. Select **Job IDs**.
3. Select **Required** if you want to prevent the job from being run unless a Job ID is selected.
  - Selecting this option for Job ID 1 means you must select a Job ID 1 to process mail.
  - Selecting this option for Job ID 2 means you must select a Job ID 2 to process mail.
  - Job ID 1 and Job ID 2 options must be set individually. Requiring Job ID 1 does not automatically do the same for Job ID 2.
4. Select **Autoclear after every batch** if you want to automatically clear the Job ID when a batch is selected.
  - Selecting this option for Job ID 1 means the system will clear the Job ID 1 at the end of each batch.
  - Selecting this option for Job ID 2 means the system will clear the Job ID 2 at the end of each batch.
  - Job ID 1 and Job ID 2 options must be set individually. Autoclearing Job ID 1 does not automatically do the same for Job ID 2.
5. Select **Done** to return to the Home screen.

## Selecting Job IDs while running mail

Job IDs are selected on the Run Mail screen. Depending on your account settings, you may be required to enter a Job ID 1 and/or Job ID 2 before processing mail.

1. Ensure that the appropriate job is open and selected on the Run Mail screen
2. Select **Job ID 1** in the Mail Information list box.
  - If you know the Job ID 1, type in the ID number and select **OK**.
  - If you want to see a list of recently used Job ID 1's, select **View all recent Job ID 1's**. Select the appropriate Job ID 1 and then select **OK**. If necessary, you can use the arrow keys to scroll through the list.
  - If you want to remove the Job ID 1 from the job, select **Clear Job ID 1**.
3. Select **Job ID 2** in the Mail Information list box.
  - If you know the Job ID 2, type in the ID number and select **OK**.
  - If you want to see a list of recently used Job ID 2's, select **View all recent Job ID 2's**. Select the appropriate Job ID 2 and then select **OK**. If necessary, you can use the arrow keys to scroll through the list.
  - If you want to remove the Job ID 2 from the job, select **Clear Job ID 2**.

## All about accounting reports

If you have purchased the accounting feature, you can create a series of reports about a specific account or series of accounts. In order to print an accounting report you need to have a document printer connected to your machine.

### Account Detail report

The Account Detail report lists a summary of pieces, postage and surcharges for an account or all accounts that have been charged for the time period specified for the report.

### Account Summary report

The Account Summary report contains a summary of the pieces and charges by account for a specific time period. It also contains the total number of pieces processed and postage charged for the selected time period.

### Quick Profile report

The Quick Profile report lists the summary of pieces, postage and surcharges for all of the accounts on your system.

### Transaction Log report

The transaction log report lists the transaction ID, account, pieces, postage, surcharge and total amount charged for each transaction during the time period specified.

### Account List report

The Account List report contains the accounts that have been defined in the system. The accounts are sorted by account name, then by sub account and sub sub account.

This report also lists the code, name, status, and description (if entered) for each account.

### **Weight Break by Account report**

The Weight Break by Account report contains a summary of the pieces and postage for each weight break by specific account or all accounts showing the carrier/class used.

### **Weight Break by Carrier report**

The Weight Break by Carrier report contains a summary of the pieces and postage for each weight break by carrier and class.

### **Weight Break by Job ID 1 report**

The Weight Break by Job ID 1 report contains a summary of the pieces and postage for each weight break by specific Job ID 1, showing the carrier and class used.

### **Account Detail by Class report**

The Account Detail by Class report contains a summary of the carriers, classes of mail, pieces, postage, fee amount, surcharges and total charge for the selected account(s). This report also contains the year to date pieces, year to date postage, year to date surcharges, and year to date total postage.

### **Transaction Log by Detail report**

The Transaction Log Detail report contains the date, start time, end time, total time, carrier, class of mail, mailrun ID 1 (Job ID 1), mailrun ID 2 (Job ID 2), operator, total weight, total pieces, postage, fees, surcharge amount, total charged, and mode type of transactions processed against the selected account(s).

### **Permit Detail report**

The Permit Detail report contains the name of the Permit, the Job name, Meter (PSD) number, the date, start time, end time, class of mail, total pieces, total weight, postage per piece, fees, and total charged.

A note about Business Manager:

If your mailing and shipping system uses Business Manager accounting, you can also view and print reports using the Business Manager Host PC. Refer to the help file provided with the Business Manager application for more information.

## Printing accounting reports

**An attached printer is required to print an accounting report.**

1. Select the **Manage Accounts** button in the Mailing tile on the Home screen.
2. Select **Reports**.
3. Select **View & print reports**.
4. Select the report you want to print.
5. Select the **Next** button.
6. If necessary, you can modify the report settings. Select a setting, and then make the appropriate changes. The settings vary, depending upon the report selected.
7. If necessary, select the **Actions** button and save the report for future use.
  - If you want to save the report with the existing name, select **Save**. When prompted, select **Yes, save**.
  - If you want to save the report with a new name, select **Save as**. When prompted, select **Yes, save as**. Type in the report name and select **OK**.

If the report was created by Pitney Bowes, "Save as" is the only available option.

8. Select the **Actions** button.
9. Select **Print report**. The report will print on the attached printer.

## Exporting accounting reports

Export an accounting report to view the report from your computer.

Accounting reports can be exported to a USB drive in .csv, .xls and .pdf formats.

The USB flash drive must be formatted as FAT or FAT32.

1. Insert a USB drive into an available port on the meter.
2. Select **Manage Accounts** in the Mailing tile on the Home screen.
3. Select **Reports**.
4. Select **View & print reports**.
5. Select the report you want to export.
6. Select the **Next** button.
7. If necessary, you can modify the report settings. Select a setting, and then make the appropriate selections. The settings vary, depending upon the report selected.
8. (Optional) Select **View Report** to preview the report.
9. If necessary, select the **Actions** button and save the report for future use.
  - If you want to save the report with the existing name, select **Save**. When prompted, select **Yes, save**.
  - If you want to save the report with a new name, select **Save as**. When prompted, select **Yes, save as**. Type in the report name and select **OK**.

If the report was created by Pitney Bowes, "Save as" is the only available option.

10. Select the **Actions** button.
11. Select **Export report**. The report export screen appears.
12. Select the **File name** field.
  - a. Enter the name you would like the report saved as.
  - b. Select **OK**.
13. Select the **Export to:** field.
  - If you want to export the file to the root of the USB drive, select the drive in the Export to: field.
  - If you want to export the file to a specific folder on the USB drive, select a folder and then select the **Open** button. Repeat this process until you have drilled down to the folder you want to use, then select the folder in the Export to: field.
14. Select **Select this folder**.
15. Select the export file type.
16. Select **OK**.
17. The system will alert you when the export is complete. Select **OK**.
18. Select **Cancel** to return to the report list.
19. To access the report, go to the folder you selected in step 14.

## Viewing accounting reports

1. Select the **Manage Accounts** button in the Mailing tile on the Home screen.
2. The message "Uploading postal information" appears. It may take a few minutes to upload your information.
3. Select **Reports**.
4. Select **View & print reports**.  
If you have not set up reporting periods, you are prompted to click on the **Set up reporting periods** link. Enter the dates in the Report period defaults screen. Click **OK** when done.
5. Select the report you want to view.
6. Select the **Next** button.
7. If necessary, you can modify the report settings. Select a setting, and then make the appropriate changes. The settings vary, depending upon the report selected.
8. Select the **View report** button.
9. If necessary, select the **Actions** menu to save, delete, export or print the report. Select the appropriate option and follow the prompts.
10. Select **Done** then **Done** to return to the Home screen.

## Setting up the reporting period for accounting reports

Before you can generate accounting reports, you need to select the reporting period settings for your system. These settings include the start and end dates of your fiscal year, as well as number of reporting periods (none, annual, twice yearly, quarterly, and monthly).

The default fiscal year runs from January 1st to December 31st. The default reporting period is calendar month.

1. Select the **Manage Accounts** button in the Mailing tile on the Home screen.
2. Select **Reports**.
3. Select **Report Period**.
4. Select the calendar icon next to the Start date of fiscal year field.
  - a. Select a date on the calendar that appears.
  - b. Select **OK**.

The End date of fiscal year is determined based on the start date you enter. It cannot be entered manually.

5. Select the **Default reporting period** field.
  - a. Select a report period type.
  - b. Select **OK**.
6. The list box on the screen is updated and provides a view the of the reporting periods based on the selections you've made.
  - Use the Previous year and Next year buttons to view the reporting periods for the previous and next year.
  - Use the up and down arrow buttons to scroll through the list of reporting periods for the current year.
7. Select **OK** to return to the Reports screen.

## Default report period types

The following options are available when selecting the default report period. The calendar month reporting period is the system default.

- Calendar month
- Calendar quarter
- Calendar semi-annual
- Every 4 weeks
- Period 4-4-5
- Period 4-5-4
- Period 5-4-4

## Using a 4-4-5 calendar to manage accounting periods

A 4-4-5 calendar divides the year into four quarters, each with 13 weeks. Each quarter is divided into two four week months and one five week month. The division can occur in any order, hence the 4-4-5, 4-5-4, and 5-4-4 accounting periods.

- **Period 4-4-5:** Select this option if you want to use the 4-4-5 calendar to manage accounting periods, with two four week months followed by one five week month.
- **Period 4-5-4:** Select this option if you want to use the 4-5-4 calendar to manage accounting periods, with a four week month followed by a five week month and then another four week month.
- **Period 5-4-4:** Select this option if you want to use the 5-4-4 calendar to manage accounting periods, with a five week month followed by two four week months.

## Setting account report preferences

These settings allow you to choose how accounts are identified in reports and the account level reporting occurs at.

1. Select the **Manage Accounts** button in the Mailing tile on the Home screen.
2. Select **Reports**.
3. Select **Preferences**.
4. Select how you want accounts identified: by **Name** or by **Code**.
5. Select the account level you want to report at: **Account**, **Sub account** or **Sub sub account**.
6. Select **OK**.

## Saving a copy of an accounting report

1. Select the **Manage Accounts** button in the Mailing tile on the Home screen.
2. Select **Reports**.
3. Select **View & print reports**.
4. Select the report you want to save a copy of.
5. Select **Save as...**
6. Enter a name for the report.
7. Select **OK**.

## Deleting accounting reports

1. Select the **Manage Accounts** button in the Mailing tile on the Home screen.
2. Select **Reports**.
3. Select **View & print reports**.
4. Select the report you want to delete.
5. Select **Delete report...**
6. Select **Yes, delete**. The report is removed from the list.

# 7 - Reports

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## All about mailing reports

Creating a report is a quick and easy way to keep an accurate record of all your mailing activities. You can print mailing reports on tape or envelopes using the internal mailing system printer. Refer to "Printing a mailing report" for more information.

### Available mailing reports

The following mailing reports are available on your system.

- Confirmation Services Receipt
- Funds Reports
- Refill Receipts
- Refill Summary

#### Note

If you have purchased the accounting feature, you can create a series of accounting reports. Refer to "All about accounting reports" for more information.

## Printing a mailing report

You can print reports on tape or envelopes using the internal mailing system printer.

1. Select the **Reports** button in the Mailing tile on the Home screen. The Reports screen displays.
2. Select the report you want to print.
3. The print dialog box appears.
  - If you want to print the report on an envelope, place an envelope on the feed deck and select the **Start** button.
  - If you want to print the report on a piece of tape, select the **Tape** button.
4. Select **Done** to return to the Home screen.

## All about funds and refill reports

The funds and refill reports allow you to print information about funds and postage refills. To print information, select **Reports** from the Home screen.

### Refill Receipt report

The Refill receipt provides detailed information on the last postage refill performed on your system.

- Refill date: date of the refill.
- Refill performed by: the user or meter that performed the refill. The user name displays if users are enabled on your system. If a meter name displays, the refill was an automatic meter refill. (This information only appears in the report if users are enabled or if automatic meter refill is turned on.)
- Postage in meter before refill: postage funds available for processing before the refill was performed.
- Refill amount: amount of the refill.
- Postage in meter after refill: postage funds available for processing after the refill was performed.
- Prepaid balance: money remaining in your PB Postage account.
- Purchase Power available: your credit line with Purchase Power.
- PBP Account Number: your PB Postage account number.
- Meter number: the number assigned to the meter.
- Meter name: the name assigned to the meter (optional).
- Printed: date and time the refill receipt was printed.

### Refill Summary report

The Refill Summary report provides a history of the last 5 refills.

- Refill Date: the date and time of the refill .
- Refill amount: amount of the refill.
- PBP Account Number: your PB Postage account number.
- Meter number: the number assigned to the meter.
- Meter name: the name assigned to the meter (optional).
- Printed: date and time the refill summary was printed.

## Funds report

The Funds report gives a summary of the funds used and available in the meter, total pieces run, and piece count.

- Available: postage funds still available for processing.
- Used: postage funds spent since the mailing system was installed.
- Total pieces: total number of pieces imprinted with postage since the mailing system was installed.
- Control sum: the total of used funds and available funds.
- Resettable piece count: total number of pieces printed since the counter was reset.
- Piece count value: postage spent since the counter was reset.
- PBP account: your postage account number.
- Indicia number: the die number that is printed on the mailpiece. This begins with "PB...."
- Meter number: the number assigned to the meter.
- Meter name: the name assigned to the meter (optional).

## Confirmation services receipt

Your system will prompt you to print a Confirmation Services Receipt for each confirmation services transaction that is processed.

- Package ID: the tracking number or package identification code
- Destination ZIP code: destination ZIP® Code of the package.
- Customer reference: the recipient name, invoice number, customer ID number, document number, etc. you used to identify the piece of mail.
- Mailing class: the class of mail used.
- Printed/Created: the date and time the report was printed.
- A fill-in space where you can write in the recipient and delivery address.

This report contains additional information if it is printed on an optional attached printer.

- PBP account number: your postage account number.
- Meter number: the number assigned to the meter.
- Meter name: the name assigned to the meter (optional).

# 8 - Refilling your meter

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## All about postage

The Funds application allows you monitor and manage funds, view refills, set postage refill values, upload postal information and view meter information.

- **Meter Funds:** select this tab to check your postage account balance, view the postage remaining on your system or to Refill your meter.
- **Last 5 Refills:** select this tab to view the history of the last 5 refills performed on your system.
- **Refill Settings:** select this tab to set the low funds warning amount and default refill amount for your system.
- **Meter Information:** select this tab to view the PSD information for your system (including your postage account number and minimum/maximum postage refill values), upload postal information or withdraw your meter.

To access these options, select the **Funds** button in the Mailing tile on the Home screen.

## Pitney Bowes postage account

Your postage account is a Pitney Bowes service that you use to add postage to your meter. You can access the postage account 24 hours a day, 7 days a week through your mailing system. For more information, refer to the postage account materials provided with your system.

## Your postage meter

The postage meter on your mailing system is a Postal Security Device (PSD) that incorporates the latest technology approved by Canada Post to secure funds. This technology eliminates the need to perform physical inspections thereby making the system easier and more convenient to use. The PSD contains the funds and performs all of the calculations necessary to print postage indicia that comply with the latest CPC standards.

Canada Post licenses your meter and requires an electronic inspection of the meter. Periodically, your mailing system will be required to connect to your postage account as a means of inspecting the PSD (Postal Security Device) and validating information in your mailing system.

To ensure that your operations are not interrupted, the time periods for the Data Center Connection are pre-established in your system, and will give adequate warning to you when this connection may be required:

- The message “Postal inspection required” will first be shown approximately 21 days after your last connection. You can connect immediately to have the meter inspected or clear the message temporarily. If you clear the message, you enter a grace period that lasts approximately 7 days.
- The “Postal inspection required” message will appear each day for 7 days (when you power-up your system), and will only disappear after a successful connection.
- On the 28th day after your last successful connection, your mailing system will display a message indicating that you will not be able to print postage until the inspection is completed.
- Follow the prompts on your mailing system to make a successful connection.

## Refilling your meter

In order to print postage onto your mailpiece, you must transfer postage funds from your Pitney Bowes account to your meter. The meter deducts the amount of your postage from the available funds on your meter. When your meter funds are low, you must add or refill more postage from your Pitney Bowes account.

### Before you begin

Make sure your meter is connected to the internet.

Follow these steps to refill postage on your meter:

1. Select a method to access your **Funds** screen:
  - Select **Funds** on the **Home** screen.
  - Select **Postage in meter** at the bottom of the **Run Mail** screen.
  - Select **Add Postage to Meter** or **Refill My Meter** when you receive a low funds warning or an insufficient funds error.

**Important:** If you see a lock symbol next to **Add Postage to Meter**, then you do not have rights to refill the meter.

2. Select the **Meter Funds** tab.
3. Select **Add Postage to Meter** or **Refill my Meter**.

4. Select a refill option.
  - a. Select **Last refill amount** to add the same postage amount selected for your last refill.
  - b. Select **Default refill amount** to add the default postage amount.
  - c. Select **Other amount** to specify the amount of money you wish to transfer from your Pitney Bowes account to your meter. Enter the refill amount and select **OK**.
5. Select **Confirm** when prompted. Your meter connects to the Pitney Bowes Data Center, adds your postage to your meter and notifies you when it is finished.
6. Select **Print receipt** if you want to print a receipt.
  - a. To print the receipt on an envelope, place an envelope of the feed deck, and select **Start**.
  - b. To print the receipt on a piece of tape, select **Tape**.
  - c. If you have an optional attached printer, select **Print on document**.
7. Select **Done** to return to the **Home** screen.

## Checking your balance at Pitney Bowes

Before refilling your meter, you should check the funds available through your postage account.

1. Select the **Funds** button in the Mailing tile on the Home screen.
2. If necessary, select the **Meter Funds** tab.
3. Select **Get Balance** to obtain your current postage account balance. The system notifies you when the account balance updates.
4. Select **OK**.
5. Select **Done** to return to the Home screen.

## Postage remaining

The postage remaining on your system displays on a button at the bottom of the Run Mail screen. You can also view the postage remaining and postage used on your system by selecting the **Meter Funds** tab in the Funds application.

To print a report of the postage available and postage used, refer to Funds and refill reports.

## Setting the low funds warning and the default refill amount

There are two postage refill settings on your system: the low funds warning value and the default refill amount.

The low funds warning value is the value at which the mailing system warns you that the funds remaining in the meter are getting low. When the available postage reaches the low funds warning value, an alert will display.

The default refill amount is the suggested value that appears when manually refilling your meter

1. Select the **Funds** button in the Mailing tile on the Home screen.
2. Select the **Refill settings** tab.
3. To set the low funds warning value, select the **Warn when postage in meter is below:** field.
  - a. Type in the postage amount.
  - b. Select **OK** when done.
4. To set the default refill amount, select the **Default refill amount:** field.
  - a. Type in the default refill amount.
  - b. Select **OK** when done.
5. Select **Done** to return to the Home screen.

## Viewing the refill history

The Last 5 refills list provides a history of the last five refills that were performed on your system. This information includes the refill date, time, amount and the name of the user that performed the refill. The user name displays if users are enabled on your system.

The refills are displayed in reverse chronological order (last refill first).

1. Select the **Funds** button in the Mailing tile on the Home screen.
2. Select the **Last 5 refills** tab. The list of the last 5 refills displays.
3. Select **Done** to return to the Home screen.

## Viewing the meter information

The Meter information tab displays the PSD (Postal Security Device) information for your system.

1. Select the **Funds** button in the Mailing tile on the Home screen.
2. Select the **Meter information** tab to view the PSD information.
  - Status
  - Manufacturing ID number
  - Product ID number
  - ZIP Code
  - PB PBI number
  - Software version number
  - Meter model/PCN
  - Minimum and maximum postage values
  - Indicia serial number
  - Total piece count for the system
3. Select **Done** to return to the Home screen.

## Finding the minimum and maximum postage values

The maximum and minimum postage values can be viewed on the Funds screen. These values define the minimum and maximum refill amounts you can use when refilling your meter.

1. Select the **Funds** button in the Mailing tile on the Home screen.
2. Select the **Meter information** tab.
3. The minimum and maximum postage values appear in the Postal Security Device (PSD) list on the left side of the screen.
4. Select **Done** to return to the Home screen.

## Finding your PB Postage account number

Often called your PB Postage account number, your postage account number can be viewed on the Settings screen.

1. Select **Settings** under Mailing on the Home screen.
2. Select the **Internet & Network** tab on the left side of the screen.
3. Select the **Intellilink®** button.
4. Your PB Postage account number appears in the Postage by Phone Account Number box.
5. Select the **Home** button to return to the Home screen.

## Uploading postal information

Periodically, your system needs to connect to Pitney Bowes and upload postal information.

Postal information upload includes all the information within the pieces run through the machine. This includes, but is not limited to, postage used, class of mail, and number of pieces. If the accounting feature is used, the postal information upload will also include account data.

1. Select the **Funds** button in the Mailing tile on the Home screen.
2. Select the **Meter Information** tab.
3. Select **Upload postal information now**.
4. The system will alert you when the upload is complete. Select **OK**.
5. Select **Done** to return to the Home screen.

## Withdrawing the meter

Contact your Pitney Bowes representative if you need to return your meter.

**Note:**

Pitney Bowes must authorize a meter withdrawal.

When instructed, follow the procedure here.

1. Select the **Funds** button in the Mailing tile on the Home screen.
2. Select the **Meter information** tab.

3. Select **Withdraw meter**.

- If Pitney Bowes has authorized the withdrawal, a dialog box appears indicating that funds are being transferred and the meter is being withdrawn. Select **OK** once the process is complete.
- If Pitney Bowes has not authorized the withdrawal, a dialog box appears indicating that the meter cannot be withdrawn.

4. Select **Done** to return to the Home screen.

# 9 - Rates and updates

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## Performing the rate updates

The Connect+ Series, SendPro P meters update postal rates and software automatically.

Your machine checks for updates every day at a specific time.

## Setting the time checks for updates

Schedule the meter to check for software updates at a specific time every day.

1. Select **Rates and Updates** from the Home screen.
2. Select **Updates Scheduler**.
3. Set the time for your meter to check for updates. Select an update time that occurs when your meter is inactive to prevent mail disruptions.
4. Select **Done** to return to the Home screen.

## Checking for rates and software updates

When you select the Rates and Updates button in the Mailing tile on the Home screen, the system checks for available updates and downloads (for example, new graphic images) that it finds. Your system must be connected to the network to run this application.

1. Select the **Rates and Updates** button in the Mailing tile on the Home screen. The system checks for updates and additional features. If updates are available, the system begins the download and displays the amount of time required to complete it.
2. Once the download is complete the Install updates dialog screen displays. You are prompted to install updates.

3. A countdown message appears on the Install updates dialog screen beginning at 5:00 minutes. The system will automatically install the update when the countdown reaches 0:00 minutes unless you select *Install now* or *Install later*.
  - Select **Install now** if you want to install the updates at this time. Follow the prompts to complete the update installation.
  - Select **Install later** if you want to install the updates at another time. The system opens the Rates and Updates Scheduler. You can use the scheduler to postpone the installation up to 4 times.

### Notes:

- Try to schedule the update for a time when the system is powered up but not in use.
- The rates and updates button shows an exclamation mark as a reminder that there are files waiting to be installed.

## Viewing the update history

1. Select the **Rates and Updates** button from the Home screen. The system will check for updates. Refer to Checking for Rates and Software Updates for more information.
2. Select **Updates History** to view a list of the updates that have installed on your system.
  - You will see the title, size, effective date and installation date of each installed update.
  - Updates can be sorted by column in ascending or descending order.
3. Select **Done** to return to the Home screen.

# 10 - System Setup

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## Personal settings

The Personal settings allow you to customize the touchscreen and display for your use.

- **Login:** If users are enabled on your system, you can use this feature to change your password or password hint.
- **Display properties:** Use this feature to adjust the brightness and contrast of the touchscreen.
- **Touchscreen:** Use this feature to calibrate the touchscreen if you find it is not responding to touch commands.

To access these options, select the **Settings** button in the Mailing tile on the Home screen and then select **Personal**.

### Changing your password or password hint

If user logins are required on your system, and you are a user with operator access, you can change your password or password hint in the Personal settings area.

1. Select **Settings** under Mailing on the Home screen.
2. If necessary, select **Personal** from the list on the left side of the screen.
3. Select **Login**.
4. Select the **Change password** button to change your password.
  - a. Enter your old password and select **OK**.
  - b. Enter your new password and select **OK**.
  - c. Re-enter your new password to confirm, and select **OK**.
5. Select the **Password hint** field to add or change your password hint.
  - a. If necessary, select the Clear button to remove the old password hint.
  - b. Type in the new password hint and select **OK**.
6. Select the **Home** button to return to the Home screen.

### Adjusting the touchscreen brightness and contrast

1. Select **Settings** under Mailing on the Home screen.
2. Select **Personal** from the list on the left side of the screen.
3. Select **Display properties**.

4. Select and drag the control button to adjust the brightness or contrast. Use the + and - buttons for a more precise selection.

## Calibrating the touchscreen

You may need to calibrate the touchscreen if you find it does not respond to touch commands.

1. Select **Settings** under Mailing on the Home screen.
2. Select **Personal** from the list on the left side of the screen.
3. Select **Touchscreen**.
4. Select **Calibrate**.
5. Perform the calibration steps on the screen:
  - **10 inch display:** Touch the center of each plus sign (+) as it appears. When finished, select OK to save the calibration.
  - **15 inch display:** Touch and hold each plus sign (+) as it is highlighted.
6. Select the **Home** button to return to the Home screen.

## Application Settings

The Application settings allow you to enter Discount Codes for parcel rates you have negotiated with Canada Post.

To access, select the **Settings** button in the Mailing tile on the Home screen.

## Discount Codes

Discount codes represent parcel rates you have negotiated with Canada Post. You receive the codes from PB. Once you enter the codes, the rates apply automatically whenever you select a class that uses these rates.

To enter new codes:

1. Select **Settings** under Mailing on the Home screen.
2. Select **Applications**, then **Discount Codes**.
3. If codes have already been entered, they will be displayed in the "Discount codes on record" list box.

4. If no codes are present, or to enter additional codes, select **Enter discount codes** button.
5. Select **Next** after each entry, then **OK** when complete.

## Internet and network settings

The Internet and Network settings allow you to:

- View the IntelliLink® connection parameters for your postage account.
- Reset the factory settings (if necessary).
- View the inserter communications settings.
- Initiate Remote Assistance when instructed by a Pitney Bowes service representative.
- Perform a network connectivity test to ensure your Connect+ Series, SendPro P system can connect successfully to the Pitney Bowes infrastructure.

To access these options, select the **Settings** button in the Mailing tile on the Home screen and then select **Internet & Network**.

### Viewing and exporting communication settings

This option allows you to view the communication settings for your system and export them to a USB drive. The communication settings are viewed within the Settings application.

1. Select **Settings** under Mailing on the Home screen.
2. Select **Internet & Network** from the list on the left side of the screen.
3. Select **Communication Settings**. The IP address, Synchronous port, Asynchronous port, Host name, Machine ID, and Machine password for the system are displayed. These fields are automatically populated by Pitney Bowes.

If it is necessary for you to export the communications settings, insert a USB drive into an available port on the mailing system.

1. Select **Export settings to USB drive...**
2. Select the **File name** field.
  - a. Type in the file name.
  - b. Select **OK**.
3. Select the **Export to** field.
  - a. Select the folder on the USB drive where you want to export the file.
  - b. Select **Open**.

4. Select **OK** to export the communication settings.
5. The system will alert you when the export is complete. Select **OK**.
6. Select **Done** to return to the Home screen.

## Viewing the IntelliLink® settings

This option allows you to view the connection parameters for your postage account. The IntelliLink® settings are viewed within the Settings application.

1. Select **Settings** under Mailing on the Home screen.
2. Select **Internet & Network** from the list on the left side of the screen.
3. Select **IntelliLink**. The Postage by Phone account number, Distributor URL, and Backup data center URL for the system appear. These fields are automatically populated by Pitney Bowes.
  - If necessary, select a field, type in the parameter and select **OK**.

Note:

Changes to the IntelliLink® parameters may result in errors when connecting to Pitney Bowes.

- If necessary, select the **Reset to Factory Settings** button to revert to the default values for these fields.
4. Select the **Home** button to return to the Home screen.

## Viewing DI900™/DI950™ inserter communication settings

This option allows you to view the communication settings for your inserting system interface. The communication settings are viewed within the Settings application.

1. Select **Settings** under Mailing on the Home screen.
2. The Settings screen displays. Select **Internet & Network** from the list on the left side of the screen.
3. Select **Inserting System**.

## Performing a Network Test

This option allows you to perform a test to ensure your Connect+ Series, SendPro P system can connect successfully to the Pitney Bowes infrastructure. This feature is used to help diagnose any potential connectivity issues.

1. Select **Settings** under Mailing on the Home screen.
2. Select **Internet & Network** from the list on the left side of the screen.
3. Select **Network Test**.
4. Select the **Network Status** tab.
5. Select **Perform Connection Test**. The machine then checks:
  - **Active Network**. This is used to ensure that your system is successfully connected to an active network and has been assigned an IP address.
  - **Connect to PB**. This ensures that connections are possible to all relevant areas of the Pitney Bowes infrastructure.
  - **Speed Test**. This performs a test of your upload and download speed.

Should you need to enter credentials for a Proxy server, these can be applied using the Proxy Settings tab, entering the relevant information and then select **Apply Settings**.

6. Select the **Home** button to return to the Home screen.

## System settings

The System settings allow you to customize your mailing system to meet your needs.

- **Timeouts**: Use this feature to set the system timeouts.
- **Clock**: Use this feature to synchronize the system clock, set the time zone, and to enable or disable Daylight Saving time.
- **Scanner Settings**: This feature allows you to configure the optional barcode scanner to easily locate an account on your system. You can scan for account name, account code, job name, job ID (1 or 2). When the scanner detects the account it automatically fills in the appropriate field or fields on the Run Mail screen.
- **Automatic Date Advance**: Use this feature to set your system to advance the date at the mail pickup time.
- **Postal Information Upload**: This feature allows you to edit the number of files that are uploaded every time the machine uploads postal information.

- **Users:** Use this feature to enable users on your system as well as create, edit and delete users and assign access levels.
- **Configuration:** Use this feature to view the status of rates, software, features, and graphic updates on your system.

To access these options, select the **Settings** button in the Mailing tile on the Home screen and then select **System**.

## Advancing the date automatically

If your mail is picked up at a certain time each day, you can set your system to advance the date at the mail pickup time. Type in the time when you want the date to advance. As soon as your system reaches the time you set, it automatically advances the date 24 hours and prints that date on your postage.

### Note:

The date on the postage should correspond to the date when your mail goes to the post office.

For example, if your mail goes to the Post Office at 3:00 PM each day, then set the date advance to "03:00 PM". Any mail processed after 3:00 PM will have the date for the following day printed on it. This ensures that the date printed on the mailpiece corresponds with the date it is brought to the Post Office.

Follow the steps below to advance the date automatically.

1. Select **Settings** under Mailing on the Home screen.
2. Select **System** from the list on the left side of the screen.
3. Select **Automatic Date Advance**.
4. Select **Yes** if you want the date to advance automatically. The time of day to advance date fields appear.
5. Select the **Hour : Minute** field.
  - a. Type in the time (hour and minute) when you want the date advance to occur. The hour can be set using the 24 hour clock (i.e. 01 to 24). The minute must be set from 00 and 59. If no value is entered in the minute box, it will be set to "00" by default.
  - b. Select **OK**.
6. Select the **Home** button to return to the Home screen.

## Postal information upload warning

If you have enabled the postal upload warning the system will alert you when the number of postal information files reach the threshold that has been set. When the warning appears you are presented with two options: *Yes, upload now* or *No, upload later*.

To upload postal information now:

1. Select the **Yes, upload now** option. The postal information upload will begin.
2. The system will alert you when the upload is complete. Select **OK**.
3. Select **Done** to return to the Home screen.

If you do not want to upload postal information at this time, select **No, upload later**. When you are ready to upload the information, follow the instructions provided in Uploading Postal Information.

## Enabling or disabling the postal information upload warning and setting the threshold

If your Connect+ Series, SendPro P system has a good network connection, it will attempt to upload postal information automatically when the screen saver is displayed, when you shut down the system down and when you enter Manage Accounts. Postal information can also be uploaded manually through the Funds application and in the Run Mail application after running tracking services or through the postal information upload warning.

The postal information upload warning will appear when the postal information files reach a specific threshold. This warning is enabled by default on your system.

- If you have a slow network connection and uploads are taking too long, lower the threshold. The upload warning will appear more frequently.
  - If you have a fast network connection and uploads are going quickly, you can raise the threshold if you feel the warnings are appearing too frequently. This will allow the system to create more files before the warning appears.
1. Select **Settings** under Mailing on the Home screen.
  2. Select **System** from the list on the left side of the screen.
  3. Select **Postal Information Upload**.
  4. Select the **Enable Postal Upload Warning** check box.
    - A check mark indicates that the warning is enabled.
    - If the check box is empty the warning is disabled.

5. Select and drag the control button along the slide bar to adjust the threshold. Use the + and - buttons for a more precise selection.
6. Select **OK** to save your changes.

## Setting the system clock

1. Select **Settings** under Mailing on the Home screen.
2. Select **Clock**. Select **System** from the list on the left side of the screen.
3. Select **Synchronize clock** to synchronize the clock.
4. To turn daylight saving time on or off select **On** or **Off**.

### Note:

Turn Daylight Saving Time on in the Spring and off in the Autumn.

5. Select the appropriate time zone from the Time Zone list.
6. Select the **Home** button to return to the Home screen.

## Setting system timeouts

System timeouts can be set for your mailing system. You can set any of the system timeouts from five minutes to four hours, in one minute increments.

1. Select the **Settings** button in the Mailing tile on the Home screen.
2. Select **System** from the list on the left side of the screen.
3. Select **Timeouts**.
4. Select the appropriate timeout from the list and then select the **Open timeout** button.
5. Select and drag the control button along the slide bar to adjust the timeout. Use the + and - buttons for a more precise selection.
6. If you have selected the default job timeout, you can enable or disable it by selecting the timeout check box. A check mark indicates that the timeout is enabled.
7. Select **OK** when you have finished making your changes.
8. Select the **Home** button to return to the Home screen.

- **Default Job Timeout:** The default job timeout option allows you to specify how much time you want to allow the system to remain idle before it the default job is reloaded on the Run Mail screen. The default timeout is 20 minutes. If necessary, this timeout can be disabled.
  - If the ENERGY STAR® shutdown timeout is not feature enabled on your system, the default job timeout can be set anywhere from one minute to four hours.
  - If the ENERGY STAR® shutdown timeout is feature enabled on your system, the default job timeout must be less than or equal to it in duration.
- **ENERGY STAR® Shutdown:** The ENERGY STAR® shutdown timeout will save money, and help protect the environment. Use this option to specify how long the system remains inactive before it goes into "sleep". The default timeout is 40 minutes. Use the power button to turn the system back on. The ENERGY STAR® shutdown timeout is an optional feature.
- **Postage hold-** If you run mail using the Attached Scale method and you remove the mailpiece from the scale, a timer begins and when the timer expires, the Run Mail screen displays the minimum postage amount for the class you selected and the weight returns to zero. You can use the Postage hold option to set the length of the timer from 10 to 60 seconds. If this option is selected, you can only adjust the time. You cannot deselect or turn this option off.
- **Account Search Timeout:** The Account Search timeout option allows you to search for a particular account and is useful if you have many accounts created in your machine. The timeout can be set to allow you to specify how much time you want the system to wait while you search for the account. The timeout range is 0 milliseconds to 5 seconds.

## ENERGY STAR®

### What you should know about ENERGY STAR®

If your system is equipped with the ENERGY STAR it will automatically shutdown after it has been inactive for 40 minutes. You must restart your system to be able to perform operations again - whether your system timed-out during the day or overnight. This restart process normally takes several minutes. The 40 minute timeout period is required to meet energy star guidelines for energy efficiency. See below to learn more about energy star.

### What is ENERGY STAR

Energy star is the trusted, government-backed symbol for energy efficiency helping us all save money and protect the environment through energy-efficient products and practices. The energy star label was established to: 1) Reduce greenhouse gas emissions and other pollutants caused by the inefficient use of energy; and 2) Make it easy for consumers to identify and purchase energy-efficient products that offer savings on energy bills without sacrificing performance, features, and comfort.

### How ENERGY STAR works on your system

60 seconds before the energy star timeout occurs, a message appears on your screen informing you that the system will shutdown in 60 seconds. It begins the countdown and displays the amount of time left on the screen. An audible beep is also emitted during this time. You can cancel the shutdown during the 60 second countdown by:

- Selecting the **Cancel shutdown** button.
- Selecting the **Energy star timeout setting** button. This takes you to System settings where you can modify the timeouts.
- Closing the energy star message window.
- Selecting the help button on the energy star message window.

### Pitney Bowes Commitment

Pitney Bowes is committed to designing and manufacturing energy efficient equipment because it lowers the operating costs and helps preserve the environment. As an energy star partner, Pitney Bowes has determined that the Connect+ Series, SendPro P system meets the ENERGY STAR® guidelines for energy efficiency with the optional (no charge) of an automatic SHUT DOWN mode. This minimizes energy consumption in compliance with the 2009 revised energy star standards for the mailing equipment category.

### How is the Energy star Mode enabled?

The Energy star Mode is optional, and is not standard with your base configurations for the Connect+ Series, SendPro P. If this option is not part of your sales configuration, the Connect+ Series, SendPro P system will not allow the automatic shut down to occur.

### Is the system energy efficient without Energy star enabled?

Yes. Every step was taken to manufacture an energy efficient system. However, the 2009 Energy star guidelines for the Mailing Machine category did not accommodate the leap in technology taken by the Connect+ Series, SendPro P Series, where PC-technology is now used for mail processing and envelope printing. PC-technology works differently than mailing machines of the past – that had simple on-off switches, and were driven primarily by gears and hard-coded software. PC-technology requires a full system shut-down to ensure the highest integrity of software applications and hardware components.

## Setting up the scanner

1. Select **Settings** under Mailing on the Home screen.
2. Select **System** from the list on the left side of the screen.
3. Select **Scanner Settings**.
4. There are five tabs along the top of the screen related to scanner settings.
  - The **Default Scan type** tab allows you to specify the type of account field the scanner will search for when it scans a barcode that does not contain a prefix.
  - The **Accounting Prefixes** tab allows you to use barcodes to automatically enter information on the Run Mail screen (for example, the account name).
  - The **Concatenate Scans** tab contains the characters you can use to join multiple barcodes into a single scan.
  - The **Barcode Auto-Enter** tab allows you to turn on/off the ability of the system to automatically enter data scanned from a barcode into the Connect+ Series, SendPro P screen without forcing the operator to press the Enter key after the barcode is completely scanned.
  - The **Scanner Diagnostics** tab allows you to verify what is actually being read by the scanner in the barcode without having to run mail.

### Setting the default scan type

The Default Scan Type tab allows you to specify the type of account field the scanner will search for when it scans the barcode.

1. Select **Settings** under Mailing on the Home screen.
2. Select **System** from the list on the left side of the screen.
3. Select **Scanner Settings**.

4. Select the **Default Scan Type** tab. Select one of the following account fields that you want the scanner to search for when scanning the barcodes.
  - **None** - Use this option if you do not want a default account type or if you will be scanning multiple fields.
  - **Account name** - This can be any name you assign to an account, sub account or sub sub account. For more information, refer to Account Attributes.
  - **Account code** - This is a unique code that you can assign to identify the account, sub account or sub sub account. For more information, refer to Account Attributes.
  - **Job name** - A job can contain set values for such items as the account name, postage amount, class, carrier, a special service, or mode such as Attached Scale or Differential weighing. For more information, refer to All About Jobs.
  - **Job ID 1** and **Job ID 2** - Your accounting system can track mail runs using Job IDs. Refer to All About Job IDs for more information.

### Setting the accounting prefixes

If you need to scan multiple account fields, you need to create barcodes that contain a 1 or 2 digit prefix. The prefix identifies the field you are scanning.

Use the **Accounting Prefixes** tab to define the prefixes. You can use this if you are transferring accounts from another accounting system or from a set of pre-printed barcodes.

As you scan a barcode, the system reads the value of the field and enters that value in the appropriate field in the Run Mail screen. For example, if the barcode contains:

- t<example>

To define the prefixes:

1. Select **Settings** under Mailing on the Home screen.
2. Select **System** from the list on the left side of the screen.
3. Select **Scanner Settings**.
4. Select the **Accounting Prefixes** tab. The screen displays the default prefixes assigned to the account fields.
  - Account Name - A\$
  - Account Code - C\$
  - Job Name - P\$
  - Job ID 1 - J\$
  - Job ID 2 - K\$

5. Select the field or fields and type in the appropriate prefix. For example, if you are scanning barcodes that contain account codes beginning with the prefix C\$, you can use the default value. If the account code contain a different prefix enter that value.

### Combining multiple barcodes into a single scan

If you need to combine multiple barcode scans into a single barcode, you will need to define concatenate join characters. For example, the typical barcode scanner can only accept a maximum of 30 characters. If you want to scan an account name that contains more than 30 characters, say 50 characters, you add a "concatenation character" at the end of the first 30 characters. These first 30 characters with the concatenation character at the end, would be on the first line and the second 20 characters would be on the second line. When you scan these two barcode lines, the system will combine them into a single barcode account value.

To select the join character for combining multiple barcode scans:

1. Select **Settings** under Mailing on the Home screen.
2. Select **System** from the list on the left side of the screen.
3. Select **Scanner Settings**.
4. Select the **Concatenate Scans** tab. The screen displays the available join characters.
  - + (plus)
  - % (percent)
  - . (period)
  - / (forward slash)
5. Select the **Home** button to return to the Home screen.

### Turning barcode auto-enter on/off

You can set up your Connect+ Series, SendPro P so that after it scans in a barcode value and displays it on the screen, it requires the operator to press the **Enter** key to accept that value. You can do this if you want to be sure that an operator verifies that the correct barcode has been scanned. By default, the system will automatically enter the value as soon as it scans in the barcode.

To enable or disable auto-enter:

1. Select **Settings** under Mailing on the Home screen.
2. Select **System** from the list on the left side of the screen.
3. Select **Scanner Settings**.
4. Select the **Barcode Auto-Enter** tab. Select the **On** option button to turn on the Auto-Enter feature; select **Off** turn it off.
5. Select the **Home** button to return to the Home screen.

### Using scanner diagnostics

The Scanner Diagnostics tab allows you to verify what is actually being read by the scanner in the barcode without having to run mail.

To determine what the scanner reads in the barcode:

1. Select **Settings** under Mailing on the Home screen.
2. Select **System** from the list on the left side of the screen.
3. Select **Scanner Settings**.
4. Select the **Scanner Diagnostics** tab.
5. Scan the barcode. The values of the scanned barcode display on the screen, for example, the Account name, Scan type, Prefix and Value.
6. Select the **Home** button to return to the Home screen.

## User roles and access rights

There are two levels of user access, supervisor and operator. If users are not set up, the system defaults to supervisor access.

Users with supervisor access to the system can create, edit and delete accounts and users can turn user logins on and off. In addition, supervisors can manage operator access to certain system functions.

Refer to User Roles Setup for more information about managing operator access.

Users with operator access to the system can perform most system functions, with the exception of account and user management and any functions that have been restricted by the supervisor.

- Setting up a single user allows you to log in and log out of the system, effectively locking it from use.
- You can create an unlimited number of users on your system.

### Enabling user logins

Set up at least one user with a password to protect your system from unauthorized access.

1. Select **Settings** under Mailing on the Home screen.
2. Select **System** from the list on the left side of the screen.
3. Select **Users**.

4. On the User setup tab, select **Enable user logins....** You will be prompted to create a user with supervisor access rights.
  - a. Type in the user name and then select **OK**.
  - b. Type in the password and select **OK**.
  - c. Re-type in the password to confirm and select **OK**.
  - d. Select the **Password hint** field to add a password hint. Type in the hint and select **OK**.
  - e. Select **OK** once you have finished creating the user.
5. If you would like to add additional users, select **Yes, create another user**. If you do not want to add any additional users at this time, select **No, done creating users**.
6. Select the **Home** button to return to the Home screen.

### Creating, editing and deleting users

You can create users as a security measure, to protect access to certain features and functions. Once you have created users, you can edit user settings including name, password and password hint. If you want to remove a user from the system you can delete the user.

**Important:** Supervisor access rights are required to manage users.

### Creating a user

**Important:** Supervisor access rights are required to manage users.

Follow these steps to create a user:

1. Select **Settings** under Mailing on the Home screen.
2. Select **System** from the list on the left side of the screen.
3. Select **Users**.
4. Select **Add new**. The Create Users screen displays.
5. Select the **Username** field to add the new user name.
6. Enter the user name and select **OK**.
7. If passwords are required on your system, or if the user needs supervisor access, select the **Password** field. Type in the password and select **OK**.

8. Select the appropriate user role: operator or supervisor
  - **Supervisors** have full access and create other users, You must have one supervisor.
  - **Operators** may be restricted from certain functions such as refilling the meter. A supervisor can set the restrictions on the Roles setup tab.
9. If necessary, select the **Password hint** field to add a password hint.
10. Enter the hint and select **OK**.
11. Select **OK** to return to the user settings screen.
12. Select the **Home** button to return to the Home screen.

### User role setup

If you have supervisor access to the system, you can manage the access rights granted to users with the operator role.

- Any changes you make to access rights will apply to all operators.
- Supervisors always have full access to system functions.

### What system functions can I manage?

You can manage operator access the following functions:

- Change data center backup URL
  - Change default refill settings
  - Change distributor URL
  - Perform a balance inquiry
  - Postage Refill
  - Print funds report on machine
  - Print refill receipts
  - Print refill summary
  - Reset batch counter
  - Reset IntelliLink Factory Settings
  - Withdraw a meter
1. Select **Settings** under Mailing on the Home screen.
  2. Select **System** from the list on the left side of the screen.
  3. Select **Users**.
  4. Select the **Roles setup** tab.
  5. Select the **Operator** user role.

6. Select the functions in the **Allow access to:** list that you want users to be able to perform.
  - A check box with a check mark indicates that all operators will have access to the function.
  - An empty check box indicates that all operators will not have access to the function.
7. Select the **Home** button to return to the Home screen.

### Editing a user

**Important:** Supervisor access rights are required to manage users.

1. Select **Settings** under Mailing on the Home screen.
2. Select **System** from the list on the left side of the screen.
3. Select **Users**.
4. Select a user to edit. If necessary, use the up and down arrow buttons to navigate through the list.
5. Select **Edit**.
6. Select the user attribute you want to edit.
  - **Password:** Select this option to require, remove or change the password for the user. Passwords are required for users with supervisor access.
  - **User role:** Select a different option from the list to change the access level assigned to the user.
  - **Password hint:** Select this option to add or change the user's password hint.
7. Select **OK** to return to the user settings screen.
8. Select the **Home** button to return to the Home screen.

### Deleting a user

**Important:** Supervisor access rights are required to manage users.

1. Select **Settings** under Mailing on the Home screen.
2. Select **System** from the list on the left side of the screen.
3. Select **Users**.
4. Select the user you want to delete. If necessary, use the up and down arrow buttons to navigate through the list.

5. Select **Delete**. If you are deleting the only user on your system, a warning message will appear indicating that user logins will be turned off and all system security will be disabled. If account passwords are being used, they will be disabled as well.
6. Select **Yes, delete user**.
7. Select the **Home** button to return to the Home screen.

### Turning off user logins

**Important:** Supervisor access rights are required to manage users.

Turning off user logins will disable all system security. Account passwords, if used, will be disabled and all system functions will be unlocked. User information will be stored on the system, should you want to enable users again at a later date.

1. Select **Settings** under Mailing on the Home screen.
2. Select **System** from the list on the left side of the screen.
3. Select **Users**.
4. On the User setup tab, a check mark appears in the Enable user logins... check box. Select **Enable user logins...** to remove the check mark from the check box.
5. A warning message displays. Select **Yes, turn off user logins**.

## Viewing the status of rates, software, features, and graphic updates

1. Select **Settings** under Mailing on the Home screen.
2. Select **System** from the list on the left side of the screen.
3. Select **Configuration**.

4. There are five tabs along the top of the screen related to rates and software status.
  - The **Messages** tab tells you whether your rates and software are up-to-date.
  - The **Basic system info** tab contains the system name, model, serial number and meter number.
  - The **Rates & software** tab contains the active and pending rates and the associated effective dates.
  - The **Features & graphics** tab contains a list of the rates and optional software features available on your system, as well as the hardware components that make up the your system. For example, hardware components include the type of scale and its capacity, and the type of connectivity (wireless LAN).
  - The **Credits** tab contains copyright and permission notices for the software on your system.
5. Select the **Home** button to return to the Home screen.

## Hardware settings

The Hardware settings allow you to view general information about your system, perform routine maintenance procedures and to adjust hardware settings.

- **General:** Select this option to view the model and serial number.
- **Printer:** Select this option to replace the ink cartridges, replace the print head, or print a test pattern.
- **Tape:** Select this option to rewind tape for removal and to bring tape to the ready position once a new roll has been inserted.
- **Sealer:** Select this option to view the location of the envelope sealant bottle and the moistener pad and to adjust the moistness of the sealer.
- **Attached scale:** Select this option to zero the scale or to change the vibration setting.
- **Feeder:** Select this option to adjust the waiting for envelope timeout.
- **WEIGH-ON-THE-WAY® (W-O-W®):** Select this option to select the weighing mode or to set the weight limit.

## Viewing your model and serial number

The model and serial number are helpful to have on hand for rate changes, phone support, and service.

1. Select **Settings** under Mailing on the Home screen.
2. Select **Hardware** from the list on the left side of the screen.

3. Select **General**. Your system name, model number, PSD PCN, PSD serial number, printer PCN and printer serial number display on the screen.
4. Select the **Home** button to return to the Home screen.

## Changing the scale vibration setting

You can turn the vibration filter on if your mailing system is in an environment subject to vibrations, such as near air-conditioning vents or closing doors. If you select this, the scale will require more time to settle before displaying a weight.

1. Select **Settings** under Mailing on the Home screen.
2. Select **Hardware** from the list on the left side of the screen.
3. Select **Attached scale**.
4. Select **Adjust for motion** to enable the vibration filter. Select **Normal** to disable the vibration filter.
5. Select the **Home** button to return to the Home screen.

## Zeroing the scale

You may need to zero the scale if the scale will not display zero weight.

### Note:

Always make sure there is nothing on the scale when the system is powered up. At power up, the system will automatically zero the scale.

1. Select **Settings** under Mailing on the Home screen.
2. Select **Hardware** from the list on the left side of the screen.
3. Select **Attached scale**.
4. Select **Zero scale**.
5. Select the **Home** button to return to the Home screen.

## Resetting the localization value

When you replace your attached scale, you are required to reset the localization value for the scale. Refer to the installation instructions supplied with the scale for instructions on resetting the localization value.

## Setting the WEIGH-ON-THE-WAY® (W-O-W®) weight limit

You can set the WEIGH-ON-THE-WAY (W-O-W) weight limit to prevent the system from printing postage on pieces of mail that exceed a set weight.

1. Select the **Run Mail** button in the Mailing tile on the Home screen.
2. Select the **Weighing** icon.
3. Select **WEIGH-ON-THE-WAY (W-O-W)**.
4. Select the **gram** field.
5. Select **Edit Limit**.
  - a. Use the numeric keypad to type in the weight in grams.
  - b. Select **OK** twice.
6. Select the **Home** button to return to the Home screen.

## Setting the WEIGH-ON-THE-WAY® (W-O-W®) Mode

If you have a Connect+ 500W, SendPro P1500, Connect+ 2000, SendPro P2000 or Connect+ 3000, SendPro P3000 mailing system, there are two WEIGH-ON-THE-WAY (W-O-W) mode settings: normal and precision.

Normal is the default mode. Precision mode allows you to obtain a more precise measurement of the weight and dimensions of your mailpieces.

Follow the steps below to set the WEIGH-ON-THE-WAY (W-O-W) mode.

1. Select **Settings** under Mailing on the Home screen.
2. Select **Hardware** from the list on the left side of the screen.
3. Select **WEIGH-ON-THE-WAY (W-O-W)**.
4. Select the appropriate mode.
5. Select the **Home** button to return to the Home screen.

## Setting the waiting for envelope timeout

Use this option to specify how much time to allow before the feeder stops after the last envelope is processed. You can set system to run until Stop is selected on the Run Mail screen, or you can set the system to stop running after a set amount of time, from 5 to 30 seconds.

This reduces the wear on your machine and acts as a safety measure if you leave the machine unattended.

1. Select **Settings** under Mailing on the Home screen.
2. Select **Hardware** from the list on the left side of the screen.
3. Select **Feeder**.
4. Select **Edit** next to the Waiting for envelopes timeout.
5. Select the appropriate length of time.
  - Select **Stop machine automatically after rollers stop** if you want the feeder to stop after the last envelope is processed.
  - Select **Wait for envelopes until stop is pressed** if you want the feeder to continue running until you press the Stop button.
  - Select **Wait for envelopes for:** if you want the feeder to continue running for a short amount of time after the last envelope is processed. Select and drag the control button to adjust the timeout. Use the + and - buttons for a more precise selection.
6. Select **OK** to accept any changes you have made.
7. Select the **Home** button to return to the Home screen.

# 11 - Maintenance

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## Installing a new tape roll

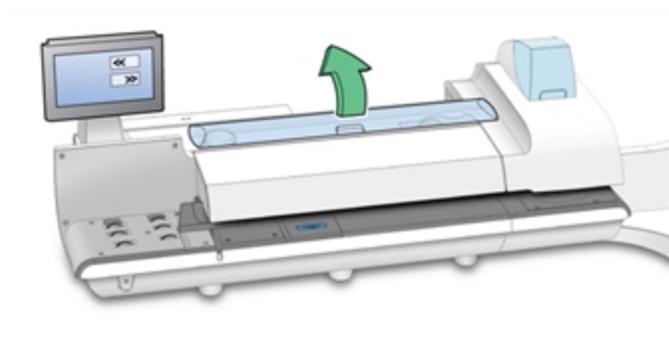
The mailing system uses gummed or adhesive tape. A red stripe appears along its edge approximately 36 inches from the end to indicate a low tape condition. Replace the tape when the stripe appears. You can install a new roll before the system actually runs out of tape.



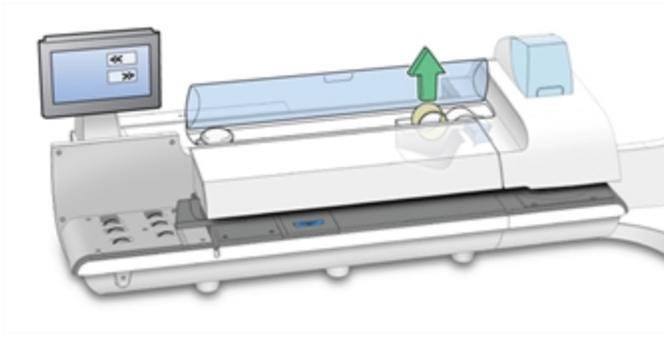
### Caution:

If you do not use Pitney Bowes supplied tape, you will not be able to determine when the tape is running out and this may cause a jam. The red stripe on the tape notifies you that you are running low on tape. There is also a black stripe that tells the machine when it is out of tape. When the system detects the black stripe on the tape it stops the machine. At this point there is still a small amount of tape on the roll.

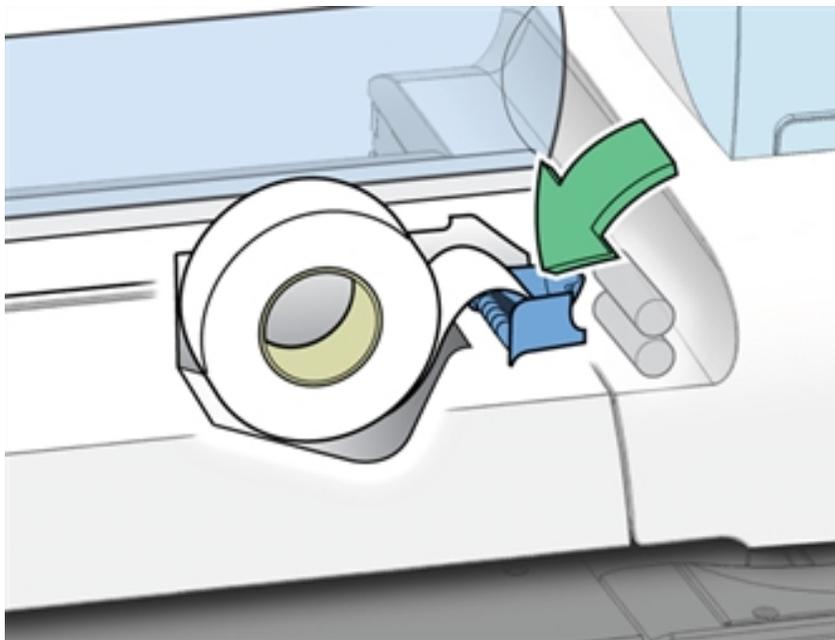
1. Select **Settings** under Mailing on the Home screen.
2. Select **Hardware**.
3. Select **Tape**.
4. Select **<< Rewind** to bring the tape back for removal.
5. Open the supplies cover.



6. Remove the old tape core from the feeding area.



7. Tear or cut (preferred method) off the end of the new roll tape to leave a straight edge.
8. Drop the new roll tape into the well. Make sure the leading tape edge comes up from under the roll and to the right.
9. Select **Feed forward >>**. The system will advance the tape feed drive.
10. Insert the lead edge of the tape into the entrance guide. The system will advance the tape to the proper position.



11. Close the cover.
12. Select **Done** to return to the Home screen.

## Refilling the envelope and tape sealant bottle

Pitney Bowes recommends using E-Z Seal® because it helps keep your moistener tank clean and improves sealing performance. Refill the sealant bottle when your E-Z Seal® is running low.

Your mailing system displays a message telling you when your E-Z Seal® is running low. When you receive this message, your system can still seal approximately 50 envelopes.

1. Lift the sealant bottle out of the cradle. The bottle is located to the right of the printer module, behind the stacker.
2. Remove the cap from the bottle.
3. Add enough E-Z Seal® to bring the level up to the bottom of the throat of the bottle. Do not overfill the envelope sealant bottle.
4. Replace and tighten the cap and return the bottle to its original position.

## No power

### Issue

The screen is black and the power lights are not lit.

### Cause

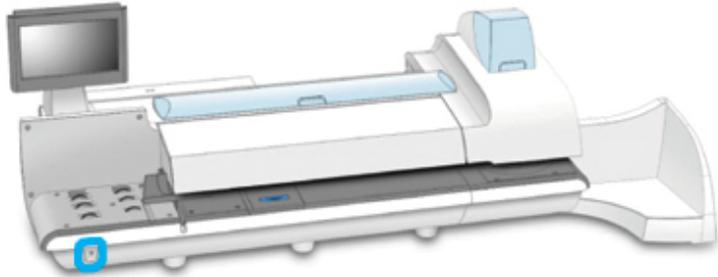
The device is not receiving any power.

### Resolution

#### Solution 1: Check the power cord

Check that the power cord is securely plugged into the back or the back, left side of your device and a working electrical outlet.

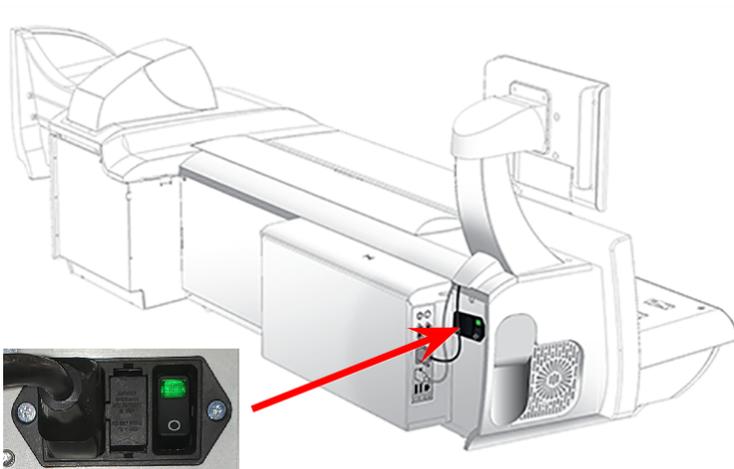
You can also try removing the power cord then plug it into another working wall outlet.



## Solution 2: Check the power lights and switches

There is a power button located on the lower left side of the feed deck. A blue light should illuminate when the switch is in the on position. . If the blue light is off, press and release the button to turn the system on.

On newer models, a power switch is also fitted at the back of your device. A green light should illuminate when the switch is in the on position. If the green light does not illuminate, please contact service personnel for support.



## Printing a test pattern

You can print a test pattern to check the print quality of the postage indicia without spending any of your postage funds. If the sample has broken or missing lines, you may need to replace the ink cartridge or print head.

1. Select **Settings** under Mailing on the Home screen.
2. The Settings screen displays. Select **Hardware**.
3. Select **Printer**.
4. Select either the **Ink Cartridges** or **Print Head** tab.
5. Select **Print test pattern**.
  - To print the test pattern on an envelope, place an envelope of the feed deck and select **Start**.
  - To print the test sample on tape, select **Tape**.
6. Check the test pattern.
  - If the solid lines of the test pattern are unbroken, select **Image is OK - Done**. Skip to step 7.
  - If the test pattern has missing or incomplete lines, select **Not OK - Clean print head**. Once the cleaning operation completes, you will be prompted to print another test pattern. If the pattern still has broken or missing lines, you may need to replace the ink cartridge or print head.
7. Select the **Home** button to return to the Home screen.

## Cleaning the printheads

You can clean the printheads at any time to ensure optimal print quality.

1. Select **Settings** under Mailing on the Home screen.
2. Select **Hardware**.
3. Select **Printer**.
4. Select the **Print head** tab.
5. Select the **Clean** button. Printhead cleaning takes approximately one minute. A progress bar indicates the cleaning status.
6. Once the cleaning process is complete, you will be prompted to print a test pattern.

## Low ink warning



### WARNING!

Your system uses ink from the ink cartridges during normal maintenance cycles. You must maintain adequate ink supply in *all* of the cartridges (black and colour) to keep the system in optimal working condition. Replace your ink cartridges promptly when warned. Running the system with an empty ink cartridge may result in damage to printer components that are not covered under your service agreement.

The Low Ink warning initially displays when there is only enough ink for approximately 10 days of mailing. You can choose to ignore this warning.

The Low Ink warning displays again approximately two days before the ink runs out. You can print about another 300 postage indicia or leave the mailing system running for six days without printing. If you do not have a replacement cartridge, order one now.

### Note:

Your actual ink usage will vary depending on whether you routinely print advertisements or inscriptions and how many pieces of mail you print per day.

## Spot black (#2) low ink warning

If the spot black (#2) ink cartridge is low on ink, a special Low Ink warning will appear. Once the spot black (#2) ink cartridge is empty, printing mail will be disabled to avoid damage to the system. It is important to replace the spot black (#2) cartridge to avoid interruption to mail operation.

When the spot black (#2) Low Ink warning appears, you can choose to ignore the warning or to install a new ink cartridge.

## Out of ink warning

The Out of Ink warning displays when there is not enough ink left in the cartridge for your mailing system to print, and the system stops printing. In order to resume printing you must replace the ink cartridge.



### Warning!

Your system uses ink from the ink cartridge during normal maintenance cycles. You must maintain adequate ink supply in the cartridge to keep the system in optimal working condition. Replace your ink cartridge promptly when warned.

Running the system with an empty ink cartridge may result in damage to printer components that are not covered under your service agreement.

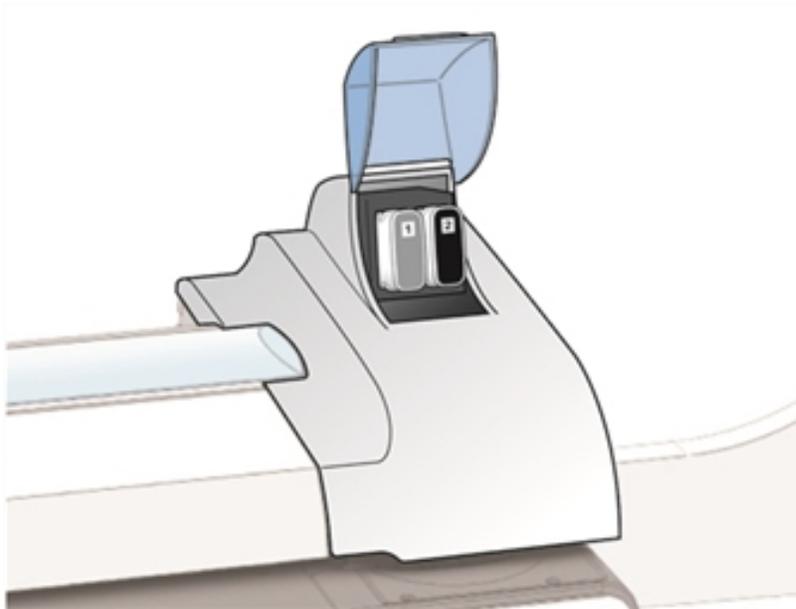
## Replacing an ink cartridge

Replace an ink cartridge once you receive the low ink or out of ink warning.

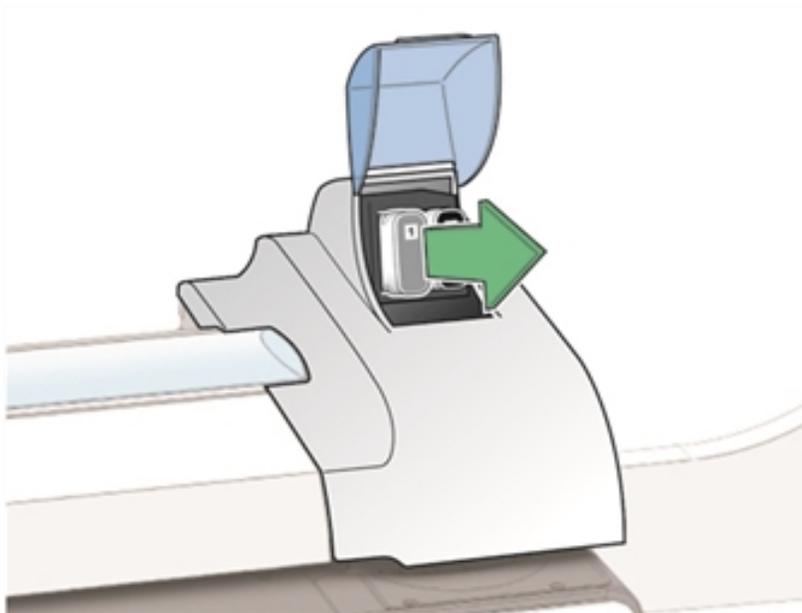
Use Pitney Bowes ink cartridges to ensure best printer performance. Other ink cartridges may cause poor print quality, rejected or returned mail and uncovered service expenses.

- The ink in the cartridge may be harmful if swallowed. Keep new and used cartridges out of reach of children.
- Discard empty cartridges immediately.
- Do not remove the ink cartridge if the print head is not installed. If the ink cartridge and print head are removed at the same time, ink from the print supply line will flow down the tube and squirt from the needle in the ink cartridge holder out into the printer and system interior.

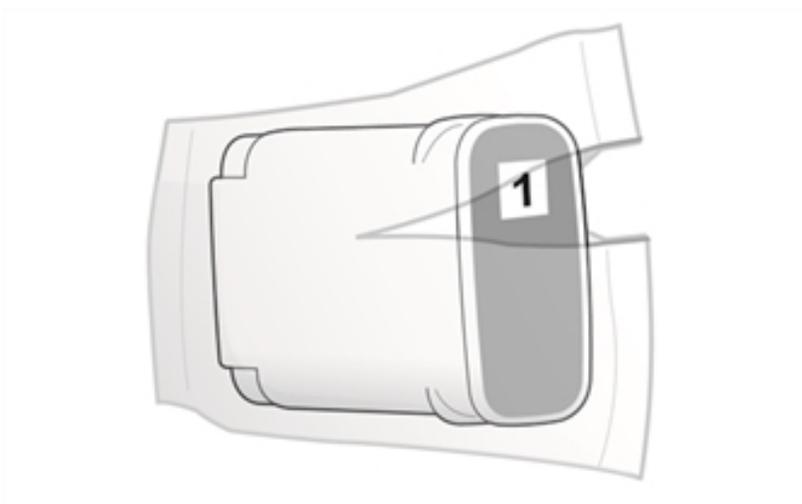
1. Select **Replace ink cartridge** when the low ink or out of ink warning appears. If there is no low ink message:
  - a. Select **Settings** on the Home screen.
  - b. Select **Hardware**.
  - c. Select **Printer**.
  - d. Select **Ink cartridges**.
  - e. Select **Replace ink cartridge**.
2. Open the ink cartridge cover. Select **Clear message** if a message about the ink cartridge cover being open appears.



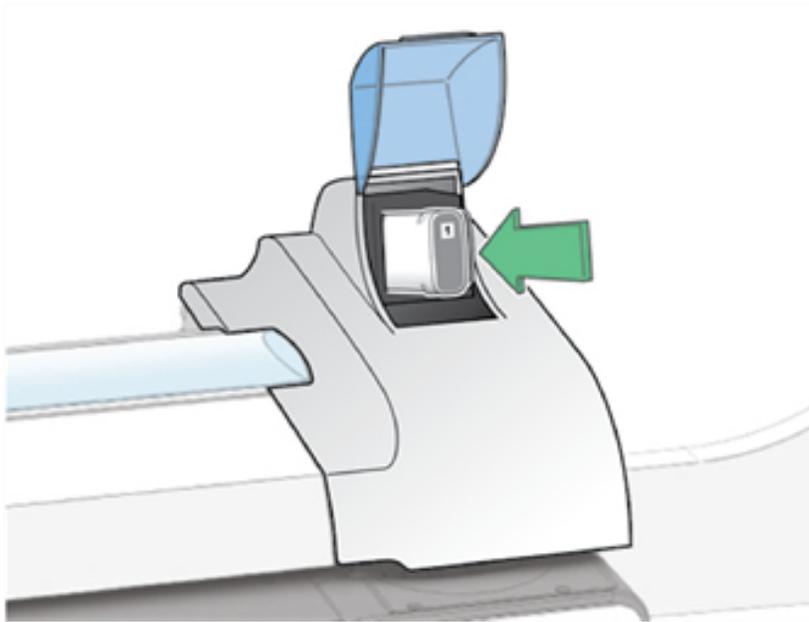
3. Pull the ink cartridge straight out.



4. The meter warns you that the ink cartridge is not installed. Select **Clear message**.
5. Remove the new ink cartridge from its packaging.



6. Hold the ink cartridge with the label facing upright and push into place.



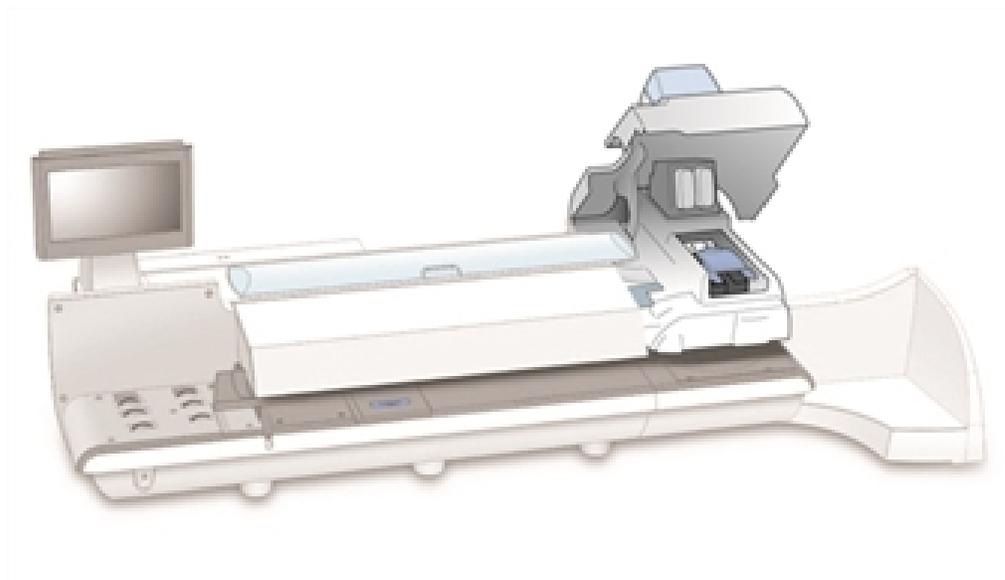
7. Close the ink cartridge cover.
8. Select **Print test pattern**.
9. Check the test sample. If the lines are solid and unbroken, the sample is acceptable.
10. Select **Image is OK - Done**.

## Replacing the printhead

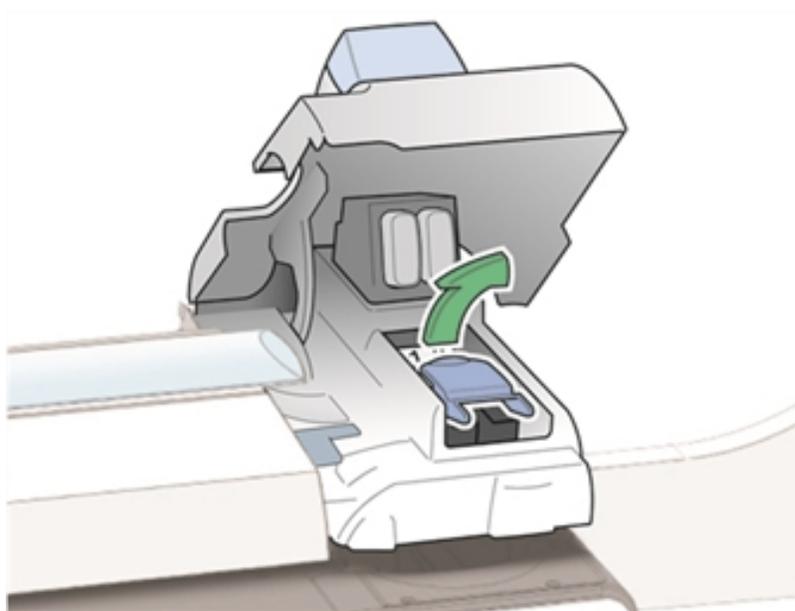
If you have cleaned the printhead and changed the ink cartridge and the print quality of the test sample is still not satisfactory, replace the printhead.

1. Select **Settings** under Mailing on the Home screen.
2. Select **Hardware**.
3. Select **Printer**.
4. Select the **Print head** tab.
5. Select **Install new...**
6. Wait for the print carriage to be prepared and moved forward. This process may take a minute.

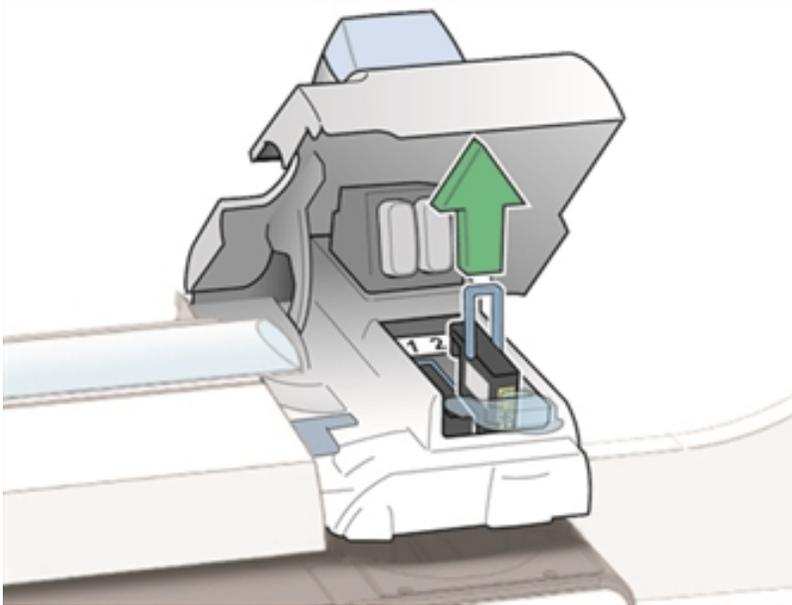
7. Open the printer cover.



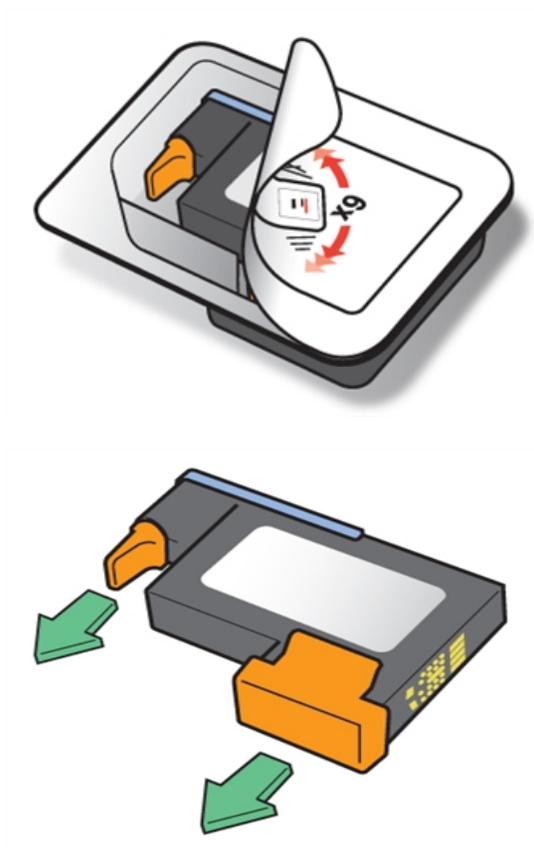
8. Pull the blue latch all the way forward until it stops.



9. Lift the blue printhead handle up to a vertical position and then lift the printhead straight up and out.

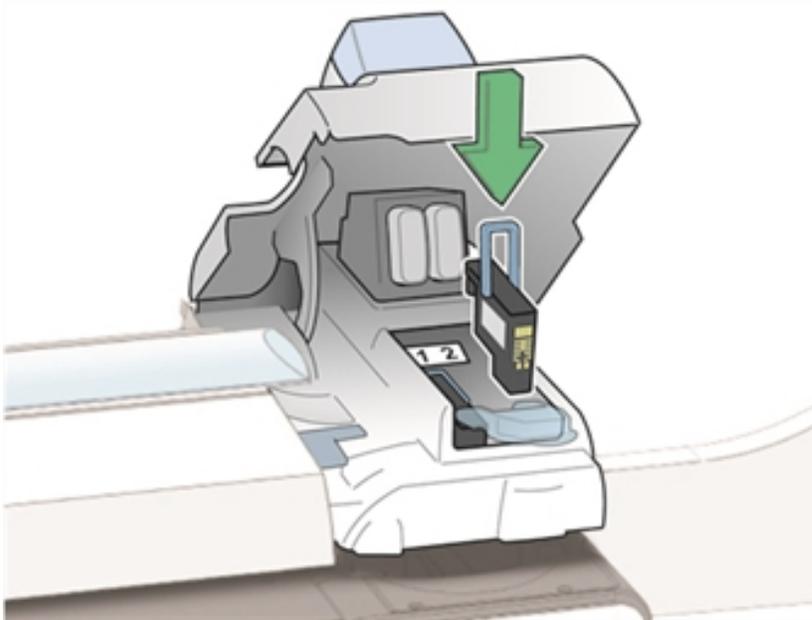


10. Remove the new printhead from its packaging. Shake the printhead three times.

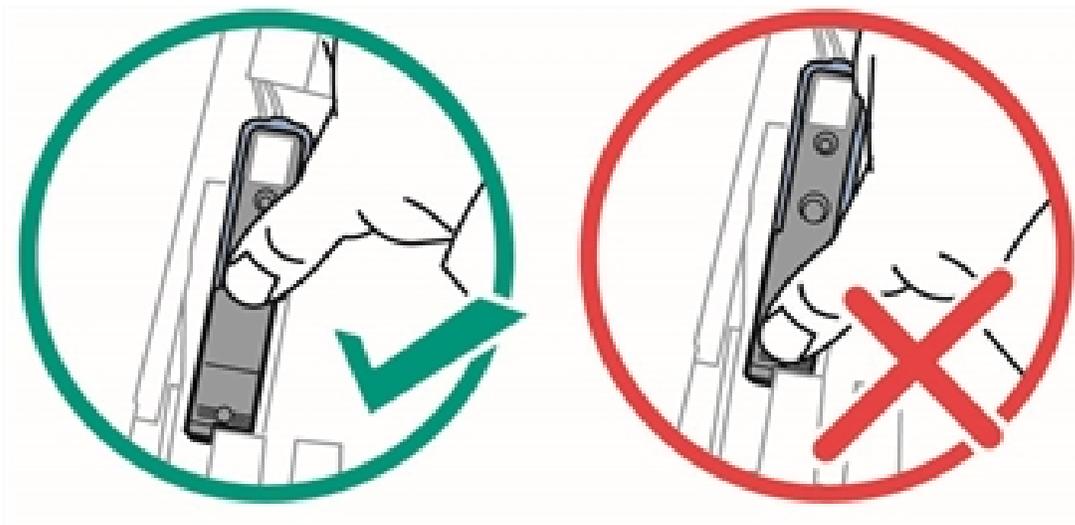


11. Insert the new printhead.

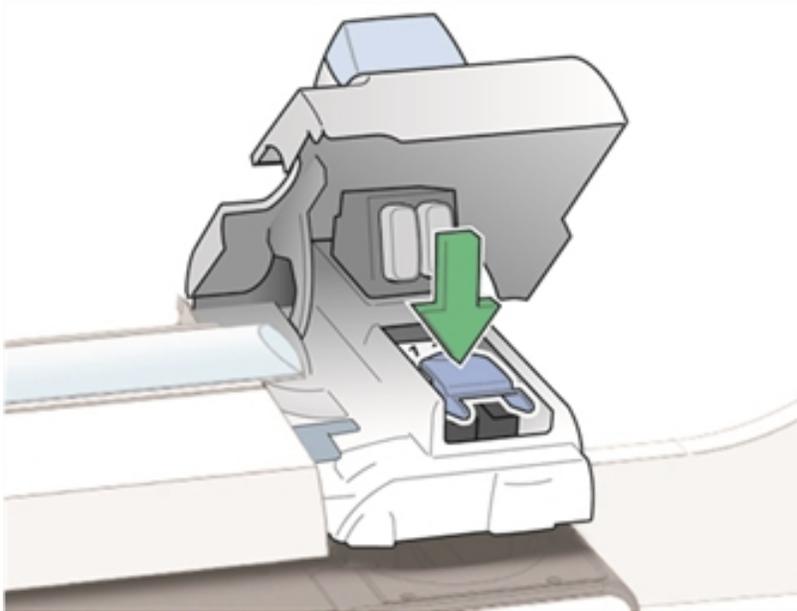
- The printhead contact must be facing toward the front of the mailing system.
- Make sure the blue handle is down.



- During installation, only apply pressure to the center of the printhead.



12. Push the blue latch back until it stops.



13. Close the printer cover. The system will begin to prepare the printhead. This process may take several minutes.
14. Once the printhead preparation is complete, you will be prompted to print a test pattern on an envelope. Place an envelope on the feed deck and select **Start**.
15. Check the test pattern. If the lines are solid and unbroken, the pattern is acceptable. Select **Image is OK - Done**.

## Aligning the printheads

If your system has a color printing module, you should perform a print head alignment after you replace the print heads. The print head alignment can be done for both envelope and tape, envelope only or tape only.

You will need four or more envelopes of the same size to perform an envelope alignment.

1. Select **Settings** under Mailing on the Home screen.
2. Select **Hardware**.
3. Select **Printer**.
4. Select the **Print head** tab.
5. Select the **Align** button. The Align Print Head screen appears.
6. Select the media type to align: **Envelope and tape**, **Envelope only**, or **Tape only**.

The alignment process varies, depending upon the media type you select. Follow the steps in the appropriate section to continue with the alignment process.

### Envelope and tape alignment

1. Type in the length of your envelope.
  - a. Use the **+** and **-** buttons to adjust the length measurement. The minimum and maximum lengths allowed are displayed on the screen.
  - b. Select **Next** to continue.
2. Select the location on the envelope where most full color graphics are printed.

*Do not change this setting unless instructed to do so.*

- Select **Left** if most full colour graphics are printed as part of the return address.
- Select **Center (recommended)** if most full color graphics are printed as part of a graphic or text message.
- Select **Right** if most full colour graphics are printed as part of a permit.

Select **Next** to continue.

3. Place an envelope on the feed deck and select **Start** to print the vertical test pattern.
4. Select the **Pattern number:** field.
  - a. Type in the number of the best aligned pattern.
  - b. Select **OK**.
  - c. Select **Next** to continue.
5. Repeat steps 3 and 4 to print the second vertical test pattern.
6. If the alignment was successful, a message appears indicating that the print heads have been vertically aligned to print on envelopes. Select **Next** to continue to the horizontal alignment.
7. Place an envelope on the feed deck and select **Start** to print the first horizontal test pattern.
8. Select the **Pattern number:** field.
  - a. Type in the number of the best aligned pattern.
  - b. Select **OK**.
  - c. Select **Next** to continue.
9. Repeat steps 7 and 8 to print the second horizontal test pattern.
10. If the alignment was successful, a message appears indicating that the print heads have been horizontally aligned to print on envelopes. Select **Next** to continue to the tape alignment.

11. Select **Tape** to print the first vertical test pattern.
  - a. Select the **Pattern number:** field.
  - b. Type in the number of the best aligned pattern.
  - c. Select **OK**.
  - d. Select **Next** to continue.
12. Repeat step 11 to print the second vertical test pattern.
13. If the alignment was successful, a message appears indicating that the print heads have been vertically aligned to print on tape. Select **Next** to continue to the horizontal alignment.
14. Select **Tape** to print the first horizontal test pattern.
  - a. Select the **Pattern number:** field.
  - b. Type in the number of the best aligned pattern.
  - c. Select **OK**.
  - d. Select **Next** to continue.
15. Repeat step 14 to print the second horizontal test pattern.
16. If the alignment was successful, a message appears indicating that the print heads have been aligned to print on envelopes and tape. Select **Done**.

#### Envelope alignment only

1. Type in the length of your envelope.
  - a. Use the **+** and **-** buttons to adjust the length measurement. The minimum and maximum lengths allowed are displayed on the screen.
  - b. Select **Next** to continue.
2. Select the location on the envelope where most full color graphics are printed.

*Do not change this setting unless instructed to do so.*

  - Select **Left** if most full color graphics are printed as part of the return address.
  - Select **Center (recommended)** if most full color graphics are printed as part of a graphic or text message.
  - Select **Right** if most full color graphics are printed as part of a permit.

Select **Next** to continue.
3. Place an envelope on the feed deck and select **Start** to print the vertical test pattern.

4. Select the **Pattern number:** field.
  1. Type in the number of the best aligned pattern.
  2. Select **OK**.
  3. Select **Next** to continue.
5. Repeat steps 3 and 4 to print the second vertical test pattern.
6. If the alignment was successful, a message appears indicating that the print heads have been vertically aligned to print on envelopes. Select **Next** to continue to the horizontal alignment.
7. Place an envelope on the feed deck and select **Start** to print the first horizontal test pattern.
8. Select the **Pattern number:** field.
  - a. Type in the number of the best aligned pattern.
  - b. Select **OK**.
  - c. Select **Next** to continue.
9. Repeat steps 7 and 8 to print the second horizontal test pattern.
10. If the alignment was successful, a message appears indicating that the print heads have been aligned to print on envelopes. Select **Done**.

#### Tape alignment only

1. Select **Tape** to print the first vertical test pattern.
  - a. Select the **Pattern number:** field.
  - b. Type in the number of the best aligned pattern.
  - c. Select **OK**.
  - d. Select **Next** to continue.
2. Repeat step 1 to print the second vertical test pattern.
3. If the alignment was successful, a message appears indicating that the print heads have been vertically aligned to print on tape. Select **Next** to continue to the horizontal alignment.
4. Select **Tape** to print the first horizontal test pattern.
  - a. Select the **Pattern number:** field.
  - b. Type in the number of the best aligned pattern.
  - c. Select **OK**.
  - d. Select **Next** to continue.
5. Repeat step 4 to print the second horizontal test pattern.
6. If the alignment was successful, a message appears indicating that the print heads have been aligned to print on tape. Select **Done**.

## Contacting Pitney Bowes

Refer to the product identifier label on the bottom left corner of the feeder cover for Pitney Bowes contact information.

### Remote System Assistance

If you are unable to correct a problem with your Connect+ Series, SendPro P system, the Pitney Bowes Support Center can instruct you on providing remote access. Once you provide authorization, the center can connect to your system and troubleshoot the problem.



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PB Form SV62589-enca Rev. P

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