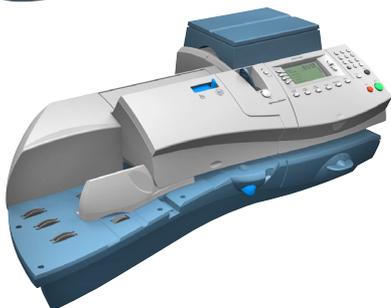




INVIEW™ Accounting for DM300c/DM400c/DM475 Digital Mailing Systems



Operator Guide
Canada English Version

SV62683 Rev. A ©2011 Pitney Bowes Inc.

All rights reserved. This book may not be reproduced in whole or in part in any fashion or stored in a retrieval system of any type or transmitted by any means, electronically or mechanically, without the express, written permission of Pitney Bowes.

We have made every reasonable effort to ensure the accuracy and usefulness of this manual; however, we cannot assume responsibility for errors or omissions or liability for the misuse or misapplication of our products.

Due to our continuing program of product improvement, equipment and material specifications as well as performance features are subject to change without notice. Your digital mailing system may not have some of the features described in this book. Available features vary, depending on the model of your mailing system, installed options, system software level, how your system is set up and the country it is designed to operate in.

INVIEW, E-Z Seal and Postage By Phone are trademarks or registered trademarks of Pitney Bowes Inc. ENERGY STAR is a registered trademark of the United States Environmental Protection Agency.

Pitney Bowes Contact List

Machine Identification

Product Name: DM300c Digital Mailing System
Model Number: 3C10

Product Name: DM400c Digital Mailing System
Model Number: 4C10

Product Name: DM475 Digital Mailing System
Model Number: 6C10

Resources

For direct questions or support, call the Pitney Bowes Customer Centre **1.800.672.6937** (M-F 8:00 AM to 8:00 PM E.T.) or visit www.pitneybowes.ca.

To order Pitney Bowes supplies and accessories, go to:

www.pitneybowes.ca and click on **Supplies**

www.pitneybowes.ca and click on **My Account**

To download the latest version of PC Meter Connect™ software, go to:

www.pitneybowes.ca/support/default.asp and click the link to download the software to your PC for installation.

To contact the Canada Post (CPC), visit: www.canadapost.com

Pitney Bowes Contact List

This page was put in as a placeholder so you can print this entire guide in a duplex (double-sided) mode while keeping the proper page positions.

Table of Contents

1 • Read this First

What's in this Guide.....	1-1
Overview of Accounting	1-2
INVIEW™ Accounting and INVIEW™ Meter Reporting	1-3

2 • System Setup for INVIEW™ Accounting

INVIEW Accounting Setup.....	2-1
Overview of INVIEW Accounting Setup (high-level steps)	2-2
Activating INVIEW Accounting.....	2-4
Setting Up the Accounting (Fiscal) Periods	2-5
Establishing a Supervisor Password	2-7
Turning ON/OFF Account Passwords Globally	2-8
Setting Global Surcharges.....	2-9
Turning Surcharges On and Off	2-10
Adding Surcharges	2-11
Clearing All Surcharges	2-12
Setting a Station ID.....	2-13
Selecting a Job ID Requirement.....	2-14
Requiring a Job ID	2-14
Auto Clearing a Job ID.....	2-14
Configuring the Optional Barcode Scanner	2-15
Setting the Default Scan Type.....	2-15
Setting Auto Enter	2-16
Combining Barcodes.....	2-17
Adding Barcode Prefixes	2-19
Setting Up the Optional PC Transfer Utility	2-21

Table of Contents

3 • Setting Up Operators

Operator Options	3-1
Enabling/Disabling the Operator Feature	3-2
Creating Operators	3-3
Enabling/Disabling the Operator Auto Log Off Feature	3-4
Viewing and Editing Operators	3-5
Deleting Operators	3-7

4 • Setting Up and Working With Accounts

Account Options	4-1
INVIEW™ Accounting Structure	4-3
Creating a New Account (Top Level)	4-5
Creating a Sub Account or SubSub Account	4-7
Viewing and Editing Accounts	4-8
Clearing Account Data	4-9
Deleting an Account	4-10

5 • Running Mail

Home Screen with INVIEW™ Accounting Activated	5-1
Selecting an Account to Track Postage	5-2
Applying Postage	5-3
Selecting a Class or Special Service	5-3
Entering a Batch Surcharge or Discount	5-4
Selecting Job IDs	5-6

6 • Transaction Options

Transaction Options	6-2
Printing the Transaction Log	6-2
Adding a Manual Transaction	6-2
Transferring Transaction Data	6-4
Clearing the Transaction Log	6-5
Setting the Condition for the Full Log Warning	6-6
Defining the Action to Take When the Log is Full	6-7

7 • Running Reports

Accounting Reports Overview	7-1
Account Reporting Options.....	7-2
Transaction Log Report	7-3
Account Summary	7-4
Quick Profile Report	7-5
Accounting Setup Report.....	7-6
Account List Report	7-7
Account Speed Code List Report	7-8
Operator List.....	7-9
Custom Reports.....	7-10
Creating a Custom Report	7-11
Selecting a Custom Report to Print.....	7-12
Viewing and Editing a Custom Report	7-14
Deleting a Custom Report.....	7-15

8 • Closing Out Fiscal Periods

Overview.....	8-1
Closing Out a Fiscal Year	8-2
Standard Accounting Periods.....	8-2
Custom Accounting Periods	8-3

9 • Troubleshooting

Troubleshooting INVIEW™ Accounting.....	9-1
Error Message/Warning Table	9-1

Index

Table of Contents

This page was put in as a placeholder so you can print this entire guide in a duplex (double-sided) mode while keeping the proper page positions.

1 • Read This First

What's in this Guide

Section	Description
Chapter 1 <i>Read This First</i>	Provides an overview of INVIEW accounting, as well as the powerful online INVIEW options that can augment the INVIEW transactions captured in your machine.
Chapter 2 <i>System Setup for INVIEW™</i>	Explains how to configure your system to use the INVIEW™ Accounting system
Chapter 3 <i>Setting Up Operators</i>	Describes how to create, edit and delete operators
Chapter 4 <i>Setting Up and Working With Accounts</i>	Tells you how to set up individual accounts, and edit and delete existing accounts
Chapter 5 <i>Running Mail</i>	Describes how to run mail with INVIEW™ Accounting activated
Chapter 6 <i>Transaction Options</i>	Describes how to enter manual transactions and how to view, clear or void transactions.
Chapter 7 <i>Running Reports</i>	Explains how to run accounting reports provided with your system and how to create customized accounting reports for your organization
Chapter 8 <i>Closing Out Fiscal Periods</i>	Describes how to print reports and/or transfer your data when a fiscal period ends.
Chapter 9 <i>Troubleshooting</i>	Describes how to handle accounting errors or warnings you may encounter on your system

Overview of INVIEW™ Accounting

The information in this manual describes how to set up the INVIEW™ Accounting feature. An accounting feature on a mailing system allows you to track your postage costs by categories. These categories can represent whatever makes sense to your organization - departments, people, locations, projects, etc. In advanced accounting features such as INVIEW™ Accounting, you can further categorize your costs using subaccounts, and even subsubaccounts.

Tracking your mailing expenses with categories allows you to manage your postal costs in a more efficient manner by knowing who (or what department) is using what type of postage to ship what type of mail.

With this model of mailing machine, you also have a choice of using Standard Accounting, Budget Manager, or Business Manager as your accounting package.

INVIEW™ Accounting and INVIEW™ Meter Reporting

INVIEW™ Meter Reporting

Besides the INVIEW™ Accounting reports and information you can run from your machine, there is an optional web-based solution available from Pitney Bowes that allows you to view and consolidate meter usage from multiple machines in your organization. This solution is called INVIEW™ Meter Reporting and is accessible from the Pitney Bowes website when you log on to *My Account*.

The INVIEW™ Meter Reporting system allows you to view and analyze your postage meter activity for one meter, one location, or across your entire enterprise. The meter activity for each meter is transferred to the INVIEW™ Meter Reporting system whenever you connect your meter to the Pitney Bowes Data Center to refill postage, check on available funds in your Postage By Phone account, or during other inspection or maintenance processes.

The system provides a series of charts and reports that summarize the usage activities from selected meters for user-defined periods of time. The charts and reports are organized into different page tabs that group similar information together to keep web site navigation simple.

Charts and reports are generated using standardized input fields that allow you to select a specific report and specify a date range and meter selection to determine what information is to be displayed. You also have the ability to export your information to print format (PDF), spreadsheet format (Excel), and standard CSV (comma separated variable) file format.

In addition, the system provides a comprehensive set of user-defined preferences you can use to tell the system how to group and identify each of your postage meters. You can:

- Assign meaningful customized names to identify your meters and to identify the locations at which they are installed
- Create meter groups that enable you to easily select and view information from meters that perform similar roles across locations
- Assign a reference code to each meter that will allow you to associate usage information (pieces and postage cost) to an internal reference such as a chargeback code or purchase order number.

INVIEW™ Accounting and INVIEW™ Meter Reporting **Accounting Reports Option of INVIEW™ Meter Reporting**

The Accounting Reports option within the INVIEW™ Meter Reporting system offers unparalleled flexibility in accessing and presenting information about where, how, and when postage is used within your organization, based on account information. Like meter activity, the account activity for each meter is transferred to the INVIEW™ Meter Reporting system whenever you connect your meter to the Pitney Bowes Data Center to refill postage, check on available funds in your Postage By Phone account, or during other inspection or maintenance processes.

The Accounting Reports option can support account information uploaded from mailing machines using INVIEW™ Accounting, Budget Manager, or Business Manager accounting systems.

The Accounting Reports option allows you to see:

- the most used accounts by mail pieces and or postage. These results can be displayed as a stacked bar chart or as a table.
- the number of pieces and total dollars charged to each account. The total charged includes the postage, additional fees such as delivery confirmation, and any surcharges applied by the mail center. Subtotals are provided for subaccounts and subsubaccounts.
- the details for each mail class within each account. This includes the number of pieces, total charged to each account, and breakdown of total charged as postage, additional fees such as delivery confirmation, and any surcharges applied by the mail center.
- the average cost per piece at different locations over the time period selected. Pieces from all meters at each location are included in the average.
- the details on specific transactions. This includes each transaction, or batch of mail, grouped at the lowest level of account. Transaction details also include the class of mail selected for the batch (or the class determined by Weigh and Dimension on the Way), the number of pieces processed, the postage, fees, surcharge, total cost allocated, and the time each transaction started and ended.

On most reports, the results for a selected time period can be compared to another time period for instant comparison.

2 • System Setup for *INVIEW™* Accounting

INVIEW Accounting Setup

This chapter contains the basic setup instructions necessary to run *INVIEW™* Accounting on your mailing system. Depending on your requirements, you may need to follow all or only some of the setup procedures listed here.

You can also create a supervisor password to limit access to setting up accounts and accessing accounts (see later in this chapter). In addition, you can include account information in your custom presets. Refer to of the DM300c/DM400c/DM475 Operator Guide for instructions on setting up custom presets.

2 • System Setup for INVIEW™ Accounting

Overview of INVIEW Accounting Setup

The table below provides an overview of the process of setting up INVIEW accounting. It also covers the entire life cycle of an account, from creation to deletion.

Step	Action	Description/Procedure
1	<i>Turn On Accounting Feature</i>	Turns on INVIEW Accounting. This is necessary before you can create accounts in INVIEW. See later section in this chapter for procedure
2	<i>Setting Up the Accounting Periods</i>	Sets up your accounting periods and fiscal year. See later section in this chapter for procedure.
3	<i>Create a Supervisor Password (optional)</i>	If you establish a Supervisor password, a user will need to enter this password to add, edit, or delete Accounts; and for clearing Account totals. Also, you need to set up a Supervisor password before you can enable Account passwords. See later section in this chapter for procedure.
4	<i>Turn On Accounting Passwords Globally (optional)</i>	You can turn on the requirement for all operators to enter passwords when choosing an account. See later section in this chapter for procedure.  NOTE: Once this option is turned on, you will need to enter passwords for reach of your accounts. See also <i>Chapter 4, Setting Up Accounts</i> for setting up account passwords.
5	<i>Set Global Surcharges (optional)</i>	You can set up a global surcharge is that applies to each transaction (or piece) processed by INVIEW™ Accounting. See later section in this chapter for procedure.
6	<i>Set Station ID (optional)</i>	The Station ID is printed on accounting reports to identify the mailing system where the reports were generated. This feature is useful when you have several different mailing systems that generate reports. See later section in this chapter for procedure.
8	<i>Set up Job ID Requirement (optional)</i>	Job ID tracking 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 processing a mail run. See later section in this chapter for procedure.

Overview of INVIEW Accounting Setup

Step	Action	Description/Procedure
9	<i>Configuration of Barcode Scanner (optional)</i>	If you are using an accounting system on your mailing system you can set up the scanner so that it knows what field is scanning without using a prefix code. You can then scan the account code or name directly from the Home screen. See later section in this chapter for procedure.
7	<i>Set up PC Transfer Utility (optional)</i>	If you are using the PC Transfer Utility, you may need to configure the Host IP address and TCP Port for the PC. See later section in this chapter for procedure.
10	<i>Create Account</i>	Sets up your account name (and password if desired). See <i>Chapter 4, Setting up Accounts</i> for procedure.
11	<i>Maintain (Edit) Account</i>	Allows you to change various attributes of an account. See <i>Chapter 4, Setting up Accounts</i> for procedure.
12	<i>Select Account</i>	Allows you to choose the specific account when running a mail piece through the machine. See <i>Chapter 5, Running Mail</i> for procedure.
13	<i>View/Print Account Data</i>	Allows you to view/print the transaction data and totals for an account. <ul style="list-style-type: none"> • For viewing account data detail, see <i>Chapter 6, Transactions Option</i> for procedure. • For printing account data and totals, see <i>Chapter 7, Reports</i> for procedure.
14	<i>Close Out Fiscal Period</i>	Explains what to do when an accounting period (monthly, quarterly, annual, etc.) ends. See <i>Chapter 8, Closing Out Fiscal Periods</i> for procedures.
15	<i>Clear Account Data</i>	Allows you to clear an account (for example, at the beginning of a new fiscal year). See <i>Chapter 4, Setting up Accounts</i> for procedure.
16	<i>Delete Accounts</i>	Allows you to delete an account. See <i>Chapter 4, Setting up Accounts</i> for procedure.

Activating INVIEW Accounting

To activate the accounting feature on your mailing system and to select INVIEW as your accounting type, follow this procedure.

1. Press the **Menu** key.
2. Select **Accounts**. The Accounts screen displays.
 - ⓘ **NOTE 1:** If the supervisor password is enabled, you may need to enter it to gain access to all of the accounting functions.
 - ⓘ **NOTE 2:** The type of accounting currently set for your system is displayed next to the Accounting selection.
3. Select **Acct Type**. The Select Accounting Type screen displays
4. Select the appropriate option:

Select Account Type
◀ Turn Accounting OFF
◀ Standard
◀ INVIEW

- To disable the current accounting, select **Turn Accounting OFF**.
- To enable the INVIEW Accounting select **InView**.

IMPORTANT:

- If you switch from one accounting system to another (for example, "Standard" to "INVIEW" or *vice versa*), **you will lose all of the data in the original accounting system**.
- Turning "OFF" the Accounting feature when you have already started using one of the accounting types ("Standard" or "INVIEW") is not recommended. Accounting data from this point forward will no longer be recorded, and your accounting data will start to go out-of-date, compromising the integrity of that data.
- If either accounting type is enabled, you **must** select an account whenever you run mail.

Setting Up the Accounting (Fiscal) Periods

When you enter the start date for the fiscal year, the system automatically determines the end date. (For example, if January 1, 2009 is the beginning of your fiscal year, the system sets the end date as December 31, 2009.)

Once the fiscal year is set, you will need to select the number of accounting periods. You can select one of the standard accounting periods (none, annual, twice yearly, quarterly, and monthly) or you can define custom account periods.

1. Press the **Menu** key.
2. Select **Accounts**. The Accounts screen displays.
 - ① **NOTE:** If the supervisor password is enabled, you may need to enter it to gain access to all of the accounting functions.
3. Press the green down arrow key and select **Acct Period**. The Accounting Period screen displays.

Accounting Period Current: 09/01/01 - 09/12/31
◀ Edit Start of Fiscal Year
◀ # Periods: 12 (Monthly) Next End Date: 09/12/31
◀ Done

4. Select **Edit Start of Fiscal Year** to change the start date. Enter the date in YYMMDD format and select **Accept**.
 - ① **NOTE 1:** You can enter a start date that is within the current year. For example, if today's date is 2009/01/20, you can enter a start date back to 2009/01/01.
 - ① **NOTE 2:** Once you run a transaction you cannot change the start date of the fiscal year until you clear the accounting data, which is normally cleared when the fiscal year ends.

Setting Up the Accounting (Fiscal) Periods

5. Select **# Periods** to change the number of accounting periods during your fiscal year.
 - a. Select the number periods for your fiscal year from the list (Annual, Twice a year, Quarterly, Monthly, Custom). If necessary, use the green down arrow key to scroll through the list.
 - b. If you select **Custom**, the Custom Period screen displays. Go to step 6. Otherwise, go to step 7.
6. You can set up two custom periods. The start date for both periods is the date you activate the custom periods. You cannot change the start date.
 - a. Select **End Date 1** to set the end date for the first custom period. Type in the date in YYMMDD format and select **Accept**.
 - b. Select **End Date 2** to set the end date for the second custom period. Type in the date in YYMMDD format and select **Accept**.
 - c. Select **Done**.
 - ① **NOTE 1:** The end date for the second period must always be the same as, or after the end for, the first custom period.
 - ① **NOTE 2:** For custom periods only, you can extend the end dates at any time. The end date for custom period 2 must always be the same as or after the end date for custom period 1.
 - ① **NOTE 3:** Once the end date of the custom period is reached, you must clear the account data, extend the end date, or both. You will be prompted to print the data before it is cleared.
 - ① **NOTE 3:** When the period expires, you will not be allowed to run mail until you either clear the data or extend the period.
7. Select **Done** to save your changes.

Establishing a Supervisor Password

A Supervisor password can be used to prevent unauthorized account changes within INVIEW Accounting. If you establish a Supervisor password, a user will need to enter this password to add, edit, or delete accounts; and for clearing account totals.

1. Press **Menu**.
2. Select **Setup**.
3. If necessary, press the green down arrow key to scroll through the menu screens.
4. Select **Lock Code/Password**.
5. Select **Enable Password**.
6. Select **Supervisor Password**. If there is an existing supervisor password, you are prompted to key in the 4-digit code.

Change Password

Enter New Password

◀ Accept

7. You then have a choice to either disable the password (if present) or change (or establish) the password.
 - A. To disable the password:

Select **Disable Password**. When prompted, enter the current Supervisor Password and select **Accept**.
 - B. To change or establish the password:

When prompted, enter the current Supervisor Password and select **Accept**. Enter the new Supervisor Password, and select **Accept**. Re-enter the new password to confirm and select **Accept**. At the *Password Enabled* message, select **OK**.

Turning ON/OFF Account Passwords Globally

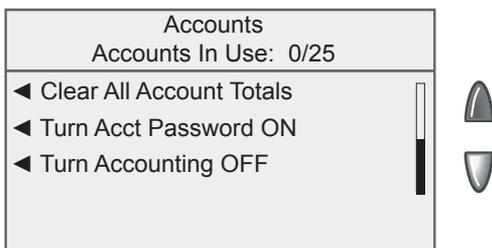
You can turn on or off the requirement for all operators to enter passwords when choosing an account.

i NOTE 1: You need to set up a Supervisor password (see *Chapter 7, System Options*) before you can enable Account passwords.

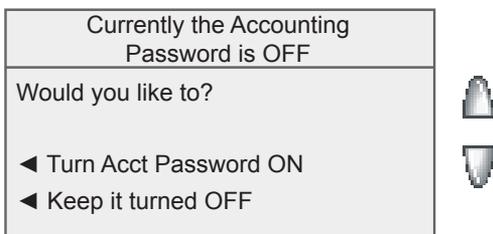
i NOTE 2: Turning on the account password feature forces you to select a new account, just in case your existing account uses a password.

1. Press **Menu**.
2. Select **Accounts**.
3. Press the green down arrow key.

i NOTE: If the supervisor password is enabled, you will need to enter it to gain access to all of the accounting functions.



4. Either Select **Turn Acct Password ON** or **Turn Acct Password OFF**.



i NOTE: You will need to enter passwords for each of your accounts once this option is turned on. See *Chapter 4, Setting Up Accounts* for setting up account passwords.

5. When prompted, select **Turn Acct Password ON**. The system returns to the Accounts screen.

Setting Global Surcharges

When you select the surcharge method from the Set Up menu, you are setting a global surcharge. A global surcharge is a permanent surcharge that applies to each transaction (or piece) processed by INVIEW™ Accounting, unless a batch (temporary) surcharge overrides it.

A transaction consists of one or more mail pieces processed by INVIEW Accounting. The transaction begins when the system grasps the first mail piece on the feed deck. The transaction will automatically end when the system displays *Ending INVIEW Transaction* on the meter. To process multiple mail pieces per transaction, rapidly insert mail into the semi-auto feeder.

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

- A per piece of mail surcharge is calculated by multiplying the number of pieces processed by the surcharge setting. The per piece surcharge can be set anywhere from -0.001 to +0.99.
- A per transaction surcharge is applied to each batch (or transaction) run on the system. The per transaction surcharge can be set anywhere from -50.00 to 50.00.
- A per transaction percentage surcharge is calculated multiplying the postage cost of the entire batch by the percent transaction setting. The per transaction percentage can be set anywhere from -100% to 100%.

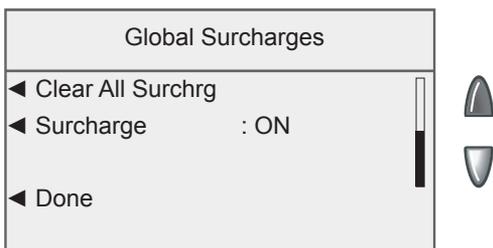
If you want to apply a batch surcharge (a temporary surcharge that is customized for a specific transaction) see *Selecting a Surcharge Mode* in *Chapter 4, Setting Up and Working with Accounts*.

Setting Global Surcharges

Turning Surcharges On and Off

Follow the steps below to turn the surcharge feature on and off. Turning the surcharge feature on allows you to apply the workstation surcharge to transactions.

1. Press the **Menu** key.
2. Select **Accounts**. The Accounts screen displays.
3. Select **Surcharge**. The Workstation Surcharges screen displays.



4. Press the green down arrow key to scroll through the menu screens. Select **Surcharge** to toggle on and off.
5. Select **Done** to save your changes.

Setting Global Surcharges

Adding Surcharges

Follow the steps below to set a global surcharge or discount:

i NOTE: You must turn the Surcharge feature on before selecting a surcharge method. Refer to *Turning Surcharges On and Off* in this chapter for more information.

1. Press the **Menu** key.
2. Select **Accounts**. The Accounts screen displays.
3. Select **Surcharge**. The Workstation Surcharges screen displays.
4. To add a surcharge or discount per piece:

Global Surcharges	
◀ Per Piece	: None
◀ Per Trans	: None
◀ Per Trans %	: None
◀ Done	



- a. Select **Per Piece**.
 - b. Type in the surcharge or discount amount you wish to use for each individual piece of mail.
 - c. If this will be a discount, select **Change to Discount Value**.
- i NOTE:** If you select **Change to Discount Value**, the dollar amount on the screen will change to a negative. A *negative* amount indicates a discount will be applied to the postage amount for the transaction. A *positive* amount indicates a surcharge will be applied to the postage amount for a transaction.
- d. Select **Accept**.

Setting Global Surcharges

Adding Surcharges

5. To add a surcharge or discount per transaction:
 - a. Select **Per Trans**.
 - b. Type in the surcharge or discount amount you wish to use for each transaction.
 - c. If this will be a discount, select **Change to Discount Value**.
 - d. Select **Accept**.
6. To add a surcharge or discount per transaction percentage:
 - a. Select **Per Trans%**.
 - b. Type in the percentage amount you wish to use.
 - c. If this will be a discount, select **Change to Discount Value**.
 - d. Select **Accept**.
7. Select **Done** to save your changes.

Clearing All Surcharges

1. Press the **Menu** key.
2. Select **Accounts**. The Accounts screen displays.
3. Select **Surcharge**. The Workstation Surcharges screen displays.
4. Press the green down arrow key to scroll through the menu screens. Select **Clear All Surchrg**. The Confirm Clear All Surcharges screen displays.

Confirm Clear All Surcharges
Permanently delete all surcharges?
◀ Yes, Delete
◀ No

5. Select **Yes, Delete** to permanently delete all workstation surcharges.
6. Select **Done** to save you changes.

Setting a Station ID

The Station ID is printed on accounting reports to identify the mailing system where the reports were generated. This feature is useful when you have several different mailing systems that generate reports.

1. Press the **Menu** key.
2. Select **Accounts**.
3. Press the green down arrow key twice and select **Station ID**.

Station ID (Prints on Acct Reports)
Enter ID: <input type="text"/> (1-99)

4. Type in the Station ID.
i **NOTE:** Station IDs must be between 1 and 99.
5. Select **Accept** when done.

Selecting a Job ID Requirement

Job ID tracking 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 processing a mail run.

Requiring a Job ID

You can set up the system to require a Job ID in order to process mail. Setting the *Job ID Required* option to “ON” means you must select a Job ID to process mail.

To require Job ID:

1. Press the **Menu** key.
2. Select **Accounts**. The Accounts screen displays.
3. Press the green down arrow key to scroll through the menu screens.
4. Select **Job ID Required** to toggle this option on and off.

Auto Clearing a Job ID

You can set up the system to automatically clear a Job ID at the end of each transaction. Setting the *Job ID Auto Clear* option to “on” means the system will clear the Job ID at the end of each transaction.

To auto clear a Job ID:

1. Press the **Menu** key.
2. Select **Accounts**. The Accounts screen displays.
3. Press the green down arrow key to scroll through the menu screens.
4. Select **Job ID Auto Clear** to toggle this option on and off.

Configuring the Optional Barcode Scanner

Setting the Default Scan Type

If you are using an accounting system on your mailing system you can set up the scanner so that it knows what field is scanning without using a prefix code. You can then scan the account code or name directly from the Home screen.

To set the default value:

1. Press the **Menu** key.
2. Select **Setup**.
3. Press the green down arrow key and select **Configure USB Scanner**. The USB Barcode Scanner Settings screen displays.

USB Barcode Scanner Settings	
◀ Home Default	: Acct Name
◀ Auto Enter	: OFF
◀ Concatenate Char	: +
◀ Prefix Setup	
Done [Enter]	

4. Select **Home Default**. The Home Default screen displays.

Home Default	
✓ None	
◀ Acct Name	
◀ Acct Code	
◀ Preset	

Configuring the Optional Barcode Scanner

Setting the Default Scan Type (cont.)

5. Select the appropriate option from the list. If necessary, press the green down arrow key to scroll through the menu screens.
 - If you do not want any default account name, code or preset, or if you will be scanning multiple fields select **None**.
 - If the barcode will always contain an account name, select **Account Name**.
 - If the barcode contains an account code, select **Account Code**.
 - If the barcode contains a preset, select **Preset**.
 - If the barcode contains a Job ID, select **Job ID**.The system returns to the USB Barcode Scanner settings screen.
6. Press **Enter** if you have finished making your changes to the scanner settings.

Setting Auto Enter

You can set up your system so that after it scans in a barcode value and displays it on the screen, it requires you 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.

1. Press the **Menu** key.
2. Select **Setup**.
3. Press the green down arrow key and select **Configure USB Scanner**. The USB Barcode Scanner Settings screen displays.

USB Barcode Scanner Settings	
◀ Home Default	: Acct Name
◀ Auto Enter	: OFF
◀ Concatenate Char	: +
◀ Prefix Setup	
Done [Enter]	

4. Select **Auto Enter** to toggle on and off.
5. Press **Enter** if you have finished making your changes to the scanner settings.

Configuring the Optional Barcode Scanner

Combining Barcodes

If you need to combine multiple barcode scans into a single barcode, use this setup option. 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 join character at the end of the first 30 characters. These first 30 characters, with the join 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.

1. Press the **Menu** key.
2. Select **Setup**.
3. Press the green down arrow key and select **Configure USB Scanner**. The USB Barcode Scanner Settings screen displays.
4. Select **Concatenate Char**. The Concatenate Character screen displays.

Concatenate Character	
✓ +	
◀ %	
◀ .	
◀ /	

5. Select the character you use to combine the barcode values. The system returns to the USB Barcode Scanner settings screen.
6. Press **Enter** if you have finished making your changes to the scanner settings.

Configuring the Optional Barcode Scanner

Combining Barcodes (cont.)

The following is an example using a + symbol as a join character.



When you scan in these three barcodes, the system will combine them into a single barcode value (e.g., SCANNERTESTBARCODEVALUE).

i NOTE: When creating your own barcodes, create them in uppercase. If you create them in lowercase, the length of the barcode will be twice that of the same barcode created using uppercase text.

Configuring the Optional Barcode Scanner

Adding Barcode Prefixes

If you are going to scan multiple fields, you will need to create barcodes that contain a 1 or 2 digit prefix. This prefix identifies the field you are scanning. You may use this if you are transferring accounts from a different accounting system, or from a set of pre-printed barcode labels that have a prefix as part of the barcode. You can then scan these barcodes when the Home screen displays.

1. Press the **Menu** key.
2. Select **Setup**.
3. Press the green down arrow key and select **Configure USB Scanner**. The USB Barcode Scanner Settings screen displays.
4. Select **Prefix Setup**. The Barcode Prefix Settings screen displays.

Barcode Prefix Settings	
◀ Prefix Size	: 1
◀ Acct Name	: A
◀ Acct Code	: C
◀ Preset	: P
Done [Enter]	



5. Select **Prefix Size** to set the size of the prefix. You can select either **One character** or **Two character**.

Configuring the Optional Barcode Scanner

Adding Barcode Prefixes (cont.)

6. Select the appropriate barcode prefix option. If necessary, press the green down arrow key to scroll through the menu screens.
 - If the barcode contains a prefix and account name, select **Acct Name**.
 - If the barcode contains a prefix and account code select **Acct Code**.
 - If the barcode contains a prefix and preset, select **Preset**.
 - If the barcode contains a prefix and Job ID, select **Job ID**.
7. When you select the barcode prefix, the default value for that option appears on the screen. To enter a new value, press the **Back/C** key to remove the default, then type in the prefix character(s). Select **Accept** when done.

 **NOTE:** Barcode prefixes are case-sensitive.

8. The Barcode Scanner Setup menu reappears. You can make other selections or press **Enter** to save your changes.

SAMPLE BARCODE



* A 1 2 3 4 5 6 7 8 9 0 *



"A" is the Default Account Name Prefix

Setting Up the Optional PC Transfer Utility

If you are using the PC Transfer Utility, you may need to enter the Host IP address and TCP Port for the PC.

1. Press the **Menu** key.
2. Select **Accounts** The Accounts screen displays.
(i) NOTE: If the supervisor password is enabled, you may need to enter it to gain access to all of the accounting functions.
3. Press the green down arrow key and select **Setup PC Transfer Utility**. The PC Utility Setup screen displays.

PC Utility Setup	
◀ Host IP :	
◀ TCP Port : 0	
◀ Done	

4. Select **Host IP**. Enter the IP address and select **Accept**.
5. Select **TCP Port**. Enter the four-digit port number and select **Accept**.
6. Select **Done** to save your changes.

2 • System Setup for INVIEW™ Accounting

This page was put in as a placeholder so you can print this entire guide in a duplex (double-sided) mode while keeping the proper page positions.

3 • Setting Up Operators

Operator Options

Operator options allow you to set up and manage operators on your mailing system.

The operator options are accessed by pressing **Menu**, selecting **Setup**, pressing the green down arrow key and then selecting **Operator Setup**. You can then select your choice from the menu as shown below.

i NOTE: The Supervisor password must be enabled to access the Operator options. If the Supervisor password has not been enabled, you will be prompted to create one here.

Setup Operators	
◀ Create Operator	<input type="checkbox"/>
◀ View/Edit Operator	<input type="checkbox"/>
◀ Delete Operator	<input type="checkbox"/>
◀ Operators	:ON <input type="checkbox"/>

Setup Operators	
◀ Operator Passwords	: OFF <input type="checkbox"/>
◀ Auto Log Off	: OFF <input type="checkbox"/>

Enabling/Disabling the Operator Feature

Follow the steps here to set up your mailing system so that you can assign operators.

If operators have already been enabled on your system, then you will need supervisor privileges to complete this operation.

1. Press the **Menu** key.
2. Select **Setup**.
3. Press the green down arrow key and select **Operator Setup**.
If operators have been enabled, the Enter Supervisor Password screen appears. At this point, you must enter a supervisor password to continue with the operation or log off the system.
4. Select Operators to toggle between On and Off.

This change will take effect the next time you or another operator logs onto the system. At that time, the system will require a valid operator ID and password to log on.

Creating Operators

Follow the steps below to create a new operator and assign a 4-digit alphanumeric password for the operator. Operator names cannot exceed 32 characters.

i NOTE: You must enable the Operator feature before you can create new operators (see topic on previous page).

If you do not have supervisor privileges, you can log on to the system, but you cannot create any new operators.

1. Press the **Menu** key.
2. Select **Setup**.
3. Press the green down arrow key and select **Operator Setup**. If operators have been enabled, the Enter Supervisor Password screen appears. At this point, you must enter a Supervisor password to continue with the operation or log off the system. If the Supervisor password has not been enabled, you will be prompted to create one here.
4. Select **Create Operator**. The Edit Name screen displays.
5. Type in the operator name and select **Accept**. The Operator Password screen appears. You can:

Operator Password	
Enter Password ██████	
◀ Turn Password Off	
◀ Accept	

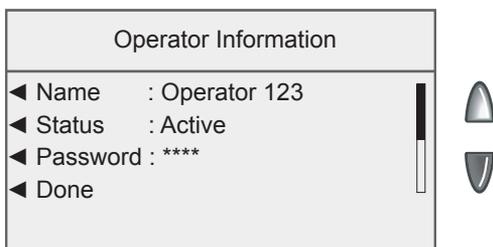
- Turn the operator password off for this operator by selecting **Turn Password Off**.
- Type in the operator password and select **Accept**. You are prompted to re-enter the operator password. Type the operator password again and select **Accept**.

i NOTE: You can create an operator password if operator passwords are disabled. However, the password cannot be used until you enable operator passwords. (See *Enabling Operator Passwords* in this section.)

3 • Setting Up Operators

Creating Operators

The Operator Information screen displays.



Operator Information	
◀ Name	: Operator 123
◀ Status	: Active
◀ Password	: ****
◀ Done	

6. Select **Status** to toggle an operator active or inactive.
7. Press the green down arrow key and select **Level** to toggle between the supervisor and operator access level privileges.
8. If necessary, press the green down arrow key and select **Report Printing** to toggle between enabling and disabling report printing capabilities for the operator.

 **NOTE:** Report printing must be enabled for an operator to print reports.

9. Select **Done** to save your changes.

Enabling/Disabling the Operator Auto Log Off Feature

Follow the steps here to set up your mailing system to log off an operator automatically after running mail.

1. Press the **Menu** key.
2. Select **Setup**.
3. Press the green down arrow key and select **Operator Setup**.
If operators have been enabled, the Enter Supervisor Password screen appears. At this point, you must enter a supervisor password to continue with the operation or log off the system.
4. Press the green down arrow key and the select **Auto Log Off** to toggle between On and Off.

This change will take effect the next time you or another operator logs onto the system. At that time, the system will require a valid operator ID and password to log on.

Viewing and Editing Operators

The Viewing/Editing Operators screen allows you to access operator-specific information that has been entered into the INVIEW™ Accounting system. You can view or edit the operator's name; lock or unlock the operator; enable, disable, or edit a password; enable or disable report printing; and edit the access level.

This operation requires that you have supervisor privileges.

i NOTE: If you log in as an operator with supervisor privileges, you do not have to enter a password to edit operators.

1. Press the **Menu** key.
2. Select **Setup**.
3. Press the green down arrow key and select **Operator Setup**.
If operators have been enabled, the Enter Supervisor Password screen appears. At this point, you must enter a supervisor password to continue with the operation or log off the system.
4. Select **View/Edit Operators**. The Select Operator screen displays.
5. Select the operator you wish to view and/or edit. The Operator Information screen appears. This screen allows you to view and edit the basic settings for the operator you have selected.
6. Select **Name**. The Enter Operator Name screen displays.

Edit Operator Name	
Operator 123_	
◀ Edit Options	
◀ View Full Screen	
◀ Cancel	
◀ Accept	

- Press the **Backspace** (back arrow) key on the keypad to delete the existing text entry, then type in new text. Select **Accept** to return the Operator Information screen.

OR

- Select **Edit Options** to move the cursor within the text entry. You can select **Move Cursor left** or **Move Cursor right** to position the cursor, then use the keypad to enter characters to replace the existing text. Select **OK** when done. Select **Accept** to return to the Operator Information screen.

Viewing and Editing Operators

7. Select **Status** to toggle an operator active or inactive.
8. Select **Password**. The Operator Password screen appears.
 - Turn the operator password off for this operator by selecting **Turn Password Off**.
 - Type in the operator password and select **Accept**. You are prompted to re-enter the operator password. Type the operator password again and select **Accept**.
9. Press the green down arrow key and select **Level** to toggle between the supervisor and operator access level privileges.
10. If necessary, press the green down arrow key and select **Report Printing** to toggle between enabling and disabling report printing capabilities for the operator.
 - ① **NOTE:** Report printing must be enabled for an operator to print reports.
11. Select **Done** to save your changes.

Any changes you make will be seen by the edited operator the next time he or she logs on to the system.

Deleting Operators

If there is transaction data associated with an operator and you delete the operator, the system does not remove the operator from the system until the end of the fiscal year. Instead, the operator becomes inactive, and will not be able to log on to the system.

At the end of your fiscal year, you will receive a prompt indicating that the last reporting period has ended. At that time, you must select the inactive operator(s) you want to permanently delete and redefine the yearly fiscal period. If there is no information connected to the operator, the system will remove the operator from the system at the time you delete it.

This operation requires that you have supervisor privileges if supervisor passwords are on or if operators have been enabled.

1. Press the **Menu** key.
2. Select **Setup**.
3. Press the green down arrow key and select **Operator Setup**.
If operators have been enabled, the Enter Supervisor Password screen appears. At this point, you must enter a supervisor password to continue with the operation or log off the system.
4. Select **Delete Operator**. The Select Operator screen appears.
5. Select the operator you wish to delete. The Confirm Delete screen appears.
6. Select **Yes** to delete the operator.

3 • *Setting Up Operators*

This page was put in as a placeholder so you can print this entire guide in a duplex (double-sided) mode while keeping the proper page positions.

4 • Setting Up and Working with Accounts

Account Options

Account options allow you to set up accounting features and customize account settings on your mailing system.

The account options are accessed by pressing **Menu** and selecting **Accounts**. You can then select your choice from the menu as shown below.

Accounts	
Acct in Use: 123/1500	
◀ Acct Type : INVIEW	
◀ Create New Account	
◀ Add Sub Account	
◀ Delete Accounts	




Accounts	
Acct in Use: 123/1500	
◀ View/Edit Accounts	
◀ Transaction Options	
◀ Setup PC Transfer Utility	
◀ Connect PC Transfer Util*	




Accounts	
Acct in Use: 123/1500	
◀ Clear Account Data	
◀ Acct Period : 09 01 31	
◀ Surcharge : OFF	
◀ Station ID : 0	




Account Options

Accounts	
Acct in Use: 123/1500	
◀ Job ID Required : OFF	
◀ Job ID Auto Clear : OFF	
◀ Accounting Password: OFF	
◀ Report Account Options	



- i NOTE 1:** The Connect PC Transfer Util menu option displays only when PC Transfer has been set up on the mailing system.
- i NOTE 2:** The Station ID menu option is covered in *Chapter 2, System Setup* in this guide.
- i NOTE 2:** The Transaction Options menu option is covered in *Chapter 6, Transaction Options* in this guide.

INVIEW™ Accounting Structure

You can use INVIEW™ Accounting to track and account for postage used by departments or individuals within your organization. Your system is set up to accept a total of 74 characters for single level accounts, a total of 73 characters for an account and sub account, and a total of 72 characters for an account, sub account, and subsub account.

When accounts are linked (account-sub account, or account-sub account-subsub account) they become a set and are treated as one separate account, with one account number and one password. The existing account number and password are rolled down to the sub account when the first sub account is created. When you create another sub account to this account, you create another linked set of accounts with a different account number and password.

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

The following examples demonstrate some of the ways in which you can structure your accounts.

- When you create a top level account, you can charge funds and pieces to that account. This is the working (chargeable) account because at this point it does not have any subordinate accounts:
Example: Account - Engineering
- If you create sub accounts for the original account, they become the end links in the account chain and identify the departments where you charge to:

Examples:

Account - Engineering, Sub account - Software

Account - Engineering, Sub account - Industrial Design

The original account now serves as an administrative account that owns and contains totals for the lower sub accounts.

4 • Setting Up and Working With Accounts

INVIEW™ Accounting Structure

- If you create subsub accounts for sub accounts, the subsub accounts become the end links and identify the departments that are charged for postage.

Examples:

Account - Engineering, Sub account - Software, Subsub account - Software Testing

Account - Engineering, Sub account - Software, Subsub account - Software Design

Account - Engineering, Sub account - Industrial Design, Subsub account- Graphics and Layout

Account - Engineering, Sub account - Industrial Design, Subsub account- User Friendly Testing

Creating a New Account (Top Level)

Follow the steps below to create a new account.

1. Press the **Menu** key.
2. Select **Accounts**. The Accounts screen displays.
 - i NOTE 1:** If the supervisor password is enabled, you may need to enter it to gain access to all of the accounting functions
 - i NOTE 2:** The type of accounting currently set for your system is displayed next to the Accounting selection
3. Select **Create New Account**. The Edit Name screen displays.
4. Type in the account name and select **Accept**. The Account Information screen displays.
 - i NOTE:** When naming your accounts, the total number of characters you can use for the name is 74. This means that if you intend to add sub and subsub accounts to this top level account name, the sum of the characters for all three accounts levels cannot be greater than 74.
5. Select **Password** to assign the account password. You can:

Account Information	
◀ Name	: Account 123
◀ Password	: ****
◀ Spd Code	: 2
◀ Done	

- Turn the password off for this account by selecting **Turn Password Off**. The system returns to the Account Information menu.
- Type in the account password and select **Accept**. You are prompted to re-enter the password. Type the password again and select **Accept**.

Creating a New Account (Top Level)

6. Select **Spd Code** to change the speed code number assigned by the system. Select the appropriate speed code from the list provided. If necessary, use the green down arrow key to scroll through the list.
 - ① **NOTE:** A speed code is a number that uniquely identifies an account. You can use it as a short cut to identify accounts with long names. As soon as you enter the name of your account, the system automatically assigns a speed code to your account.
7. Press the green down arrow key and select **Description**. Type in a brief description of the account and select **Accept**.
8. Press the green down arrow key and select **Manage Sub Acct**, then select **Add New Sub** to add a sub account to the account. Refer to *Creating a Sub Account or SubSub Account* in this chapter for more information.
9. Select **Done** once you have finished entering the account information.

Creating a Sub Account or SubSub Account

1. Press the **Menu** key.
2. Select **Accounts**. The Accounts screen displays.
 - ① **NOTE:** If the supervisor password is enabled, you may need to enter it to gain access to all of the accounting functions.
3. Select **Add Sub Account**.
4. Select the appropriate account from the list.
 - If this the first sub account you are adding to the account, the Edit Name screen displays.
 - If sub accounts and subsub accounts already exist for the account, the Add Sub or SubSub to Account screen displays. Select the appropriate accounting level to continue.
5. Type in the account name and select **Accept**. The sub account information screen displays.
6. Select **Password** to assign the sub or subsub account password. You can:
 - Turn the password off for this sub or subsub account by selecting **Turn Password Off**. The system returns to the Account Information menu.
 - Type in the sub or subsub account password and select **Accept**. You are prompted to re-enter the password. Type the password again and select **Accept**.
7. Select **Spd Code** to change the speed code number assigned by the system. Select the appropriate speed code from the list provided. If necessary, use the green down arrow key to scroll through the list.
8. Press the green down arrow key and select **Description**. Type in a brief description of the sub or subsub account and select **Accept**.
9. Press the green down arrow key and select **Add SubSub Acct** to add a subsub account to the sub account.
10. Select **Done** once you have finished entering the account information.

Viewing and Editing Accounts

You can view or edit the account name, password, speed code, description, spending limit, and add or manage subsub accounts and/or sub accounts for all of the accounts entered into INVIEW™ Accounting.

The menu options vary, depending upon the accounting level.

1. Press the **Menu** key.
2. Select **Accounts**. The Accounts screen displays.
 - ① **NOTE:** If the supervisor password is enabled, you may need to enter it to gain access to all of the accounting functions.
3. Press the green down arrow key and select **View/Edit Accounts**. The Select Account screen displays.
4. Select an account from the list. The Account Information screen displays.
 - a. If you want to edit a sub account, press the green down arrow key and select **Manage Sub Acct**. Select **View/Edit Sub** and select the sub account from the list.
 - b. If you want to edit a subsub account, press the green down arrow key and select **Manage SubSub Acct**. Select **View/Edit SubSub** and select the subsub account from the list.
5. Select the option you want to edit and follow the prompts. If necessary, use the green down arrow key to scroll through the menu.
6. Select **Done** to save your changes.

Clearing Account Data

You should clear data only at the end of a period or when the transaction log is full. While you do not need to clear data after each period, it is recommended that you print reports or transfer data to PC Transfer.

IMPORTANT:

Clearing the account data **will permanently erase all transaction details**. Once data is cleared, only summary information will be available on the system.

1. Press the **Menu** key.
2. Select **Accounts**. The Accounts screen displays.
 **NOTE:** If the supervisor password is enabled, you may need to enter it to gain access to all of the accounting functions.
3. Press the green down arrow key and select **Clear Account Data**. The Confirm Clear Account Data screen displays.

Confirm Clear Account Data
Permanently delete all accounting records?
◀ Print Report
◀ Delete Data

4. If necessary, select **Print Report**. The Select Accounting Report screen displays. Select the appropriate report and follow the prompts to print the report.
5. Select **Delete Data** to delete the accounting records.

Deleting an Account

When deleting accounts be advised that:

- Deleting an account deletes all of the information for that account.
- If there is any information connected to an account (for example, transaction data), the system will not allow you to delete the account until the end of the fiscal year. Instead it allows you to mark the account as inactive. The system will notify you when the last period of the fiscal year ends. At that time, you must select the inactive accounts you want to permanently delete and redefine the yearly fiscal period.

If there is no information connected to the account, the system will actually remove the account when you delete it.

Follow the steps below to delete an account:

1. Press the **Menu** key.
2. Select **Accounts**. The Accounts screen displays.
 **NOTE:** If the supervisor password is enabled, you may need to enter it to gain access to all of the accounting functions.
3. Select **Delete Account**. The Select Account screen displays with a list of all the available account, sub account and subsub account combinations on the system.
4. If necessary, use the green down arrow key to scroll through the list. Select the account you want to delete. The Confirm Delete screen displays.
5. Select **Yes, Delete**. The Account Deleted screen displays.
6. Select **Yes** to delete additional accounts. Repeat steps 4 and 5 in this section to delete the account.
Select **No** if you are done deleting accounts. The system returns to the Accounts menu.

5 • Running Mail

Home Screen with INVIEW™ Accounting Activated

Shown below are typical Home screen(s) when you first log onto your system and INVIEW™ Accounting is activated. These screens reflect the choices you've made for applying postage.

i NOTE: Press the green down arrow key to access additional postage settings (screens).

Scale Weight	\$0.00
	2009.11.10
◀ Account	: Quality Control
◀ Class	: Dom Standard
◀ Ad	: None
◀ Inscript.	: None

i NOTE: If the account name or account code is more than 16 characters long, it will be truncated on the screen:
Quality...Dept.

Scale Weight	\$0.00
	2009.11.10
◀ Txt Msg	: None
◀ Job ID	: None
◀ Srchrg	: None
Batch	: \$145.45

Scale Weight	\$0.00
	2009.11.10
Batch Ct	: 12

Selecting an Account to Track Postage

You can select an account manually by scrolling through the entire list of accounts on your system.

If you know part of the account name or the account code, you can use the account name search or the account code search to locate the account you want to use.

If you know only part of the account name or the account code, you can use the account name or account code search to narrow down the list of accounts to those that most closely match the search criteria you entered.

Follow the steps below to select an account

1. From Home screen, press the selection key next to Account. The Select Account screen displays.

Select Account	
Current: None	
✓ None	0
◀ Sales	1
◀ Engineering	2
◀ Marketing	3
<input type="text"/>	(Use Keypad)



2. Select the appropriate account.
 - **To select an account manually:** press the green down arrow key to see more choices (if lit). Press the selection key that corresponds with the account you want to use.
 - **To select an account by name:** type in the first few characters of the account name. The list on the screen will show all the account names that start with the characters you have entered. Press the selection key that corresponds with the account you want to use.
 - **To select an account by account code:** type in the account code, or the first few numbers of the account code. The screen will display the account codes that correspond with the account code you typed. Press the selection key that corresponds with the account you want to use.

Selecting an Account to Track Postage

3. If a password has been assigned to this account, you will be prompted to enter one. Key in the four-digit password if necessary and select **Accept** or press **Enter**.
4. You return to the Home screen with the name of the account listed (the example below shows Sales as the account chosen).

 **NOTE:** You may also select an account name or account code using an optional handheld barcode scanner. Refer to *Chapter 2, System Setup* in this guide for more information.

Applying Postage

Refer to *Chapter 3, Running Mail* in the DM300c/DM400c/DM475 Operator Guide for more information about applying postage.

Selecting a Class or Special Service

Each carrier has its own set of classes and each class has its own set of special services (or fees). When you select a class, only those options available for that selection appear on the Home screen.

Refer to the *Chapter 3, Running Mail* in the DM300c/DM400c/DM475 Operator Guide (SV62261) for more information about selecting a class or special service.

Entering a Batch Surcharge or Discount

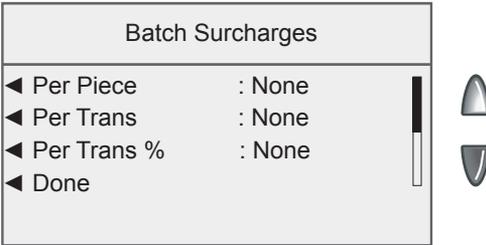
When you select the surcharge method from the Home screen, you are setting a batch surcharge, or a *temporary* surcharge that will be applied only to the current transaction being processed by the INVIEW™ Accounting system.

Setting a batch surcharge will override your global surcharge settings, but only for the current transaction. Once the transaction is complete, the system will revert to the global surcharge settings for the system. You can apply a batch surcharge per piece of mail, per transaction, and/or per transaction percentage.

If you want to set up a global surcharge, or a surcharge that will be applied to each and every transaction processed by the INVIEW™ Accounting system, see *Selecting a Surcharge Mode in Chapter 4, Setting Up and Working with Accounts.*

To enter a temporary, batch surcharge:

1. At the Home screen, press the green down arrow key.
2. Select **Surcharge**. The Batch Surcharges screen displays.



3. To clear the existing batch surcharge settings, press the green down arrow key and select **Clear All Surcharges**. The per piece, surcharge per transaction, and per transaction percentage surcharges are set to none.

Entering a Batch Surcharge or Discount

4. To add a surcharge or discount per piece:
 - a. Select **Per Piece**.
 - b. Type in the surcharge or discount amount you wish to use for each individual piece of mail. The minimum amount you can enter is -\$1. The maximum amount you can enter is \$1.
 - c. If this will be a discount, select **Change to Discount Value**.
 -  **NOTE:** If you select **Change to Discount Value**, the dollar amount on the screen will change to a negative. A *negative* amount indicates a discount will be applied to the postage amount for the transaction. A *positive* amount indicates a surcharge will be applied to the postage amount for a transaction.
 - d. Select **Accept**.
5. To add a surcharge or discount per transaction:
 - a. Select **Per Transaction**.
 - b. Type in the surcharge or discount amount you wish to use for each transaction. The minimum amount you can enter is -\$50. The maximum amount you can enter is \$50.
 - c. If this will be a discount, select **Change to Discount Value**.
 - d. Select **Accept**.
6. To add a surcharge or discount per transaction percentage:
 - a. Select **Per Transaction Percentage**.
 - b. Type in the percentage amount you wish to use. The minimum amount you can enter is -\$100. The maximum amount you can enter is \$100.
 - c. If this will be a discount, select **Change to Discount Value**.
 - d. Select **Accept**.
7. Select **Done** to return the previous screen.

Selecting a Job ID

A Job ID field allows you to identify specific tasks within an account. Assigning a Job ID to a transaction allows you to track the amount of money you spend on postage, as well as how frequently you process a given transaction.

Follow the steps below to add a Job ID to a transaction:

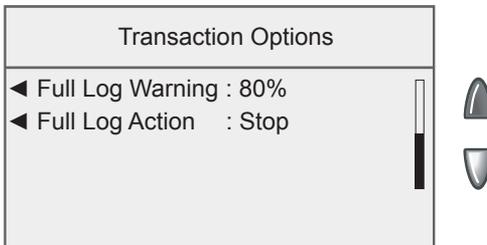
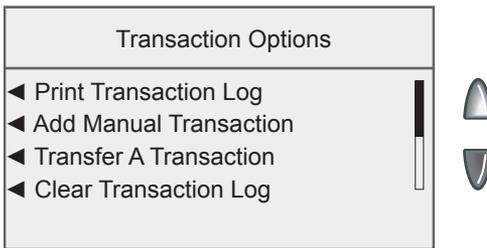
1. From the Home screen, press the green down arrow key.
2. Select **Job ID**.
3. Type in the Job ID number and select **Accept**; or select the **Select from Recent List** option, then select the Job ID. (If necessary, use the green down arrow key to scroll through the menu screens.)
4. The system returns to the Home screen once you have made your Job ID selection.

6 • Transaction Options

Transaction Options

Transaction options allow you to create manual transactions and view transaction data on your mailing system.

The transaction options are accessed by pressing Menu, selecting Accounts, pressing the green down arrow key and then selecting Transaction Options. You can then select your choice from the menu as shown below.



Printing the Transaction Log

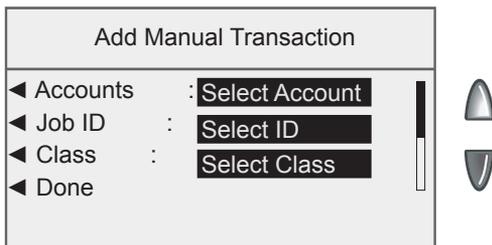
When you select the Print Transaction Log option on the Transaction Options menu the system directs you to the Transaction Log report.

Refer to the *Transaction Log Report* section in Chapter 7 of this guide for more information.

Adding a Manual Transaction

Follow the steps below to add a manual transaction.

1. Press the **Menu** key.
2. Select **Accounts**.
3. Press the green down arrow key and select **Transaction Options**. The Transaction Options screen displays.
4. Select **Add Manual Transaction**. The Add Manual Transaction screen displays. The options you choose to use will vary depending upon your manual transaction needs.



Add Manual Transaction	
◀ Accounts	: Select Account
◀ Job ID	: Select ID
◀ Class	: Select Class
◀ Done	

5. Select **Account** to choose an account from the available accounts on your system to run the manual transaction against. Use one of the following methods to select an account:
 - **To select an account manually:** press the green down arrow key to see more choices (if lit). Press the selection key that corresponds with the account you want to use.
 - **To select an account by name:** type in the first few characters of the account name. The list on the screen will show all the account names that start with the characters you have entered. Press the selection key that corresponds with the account you want to use.
 - **To select an account by account code:** type in the account code, or the first few numbers of the account code. The screen will display the account names that correspond with the account code you typed. Press the selection key that corresponds with the account you want to use.

Adding a Manual Transaction

6. Select **Job ID** to assign a Job ID to the manual transaction.
7. Select **Class** to set the postage class. Follow the prompts to select the appropriate postage class.
8. If necessary, press the green down arrow key and select **Postage** to set the actual postage amount for a piece of mail.
 - A. Type in the actual postage amount for a piece of mail.
 - B. Select **Accept**.
9. Press the green down arrow key and select **Chrg Amt** to set the postage amount that you will be charging for each piece of mail.
 -  **NOTE:** This is the actual postage amount plus any surcharges you may want to add. The minimum amount you can enter is \$0. The maximum amount you can enter is \$50 greater than the actual postage amount.
 - A. Type in the charged postage amount for a piece of mail.
 - B. Select **Accept**.
10. Press the green down arrow key and select **Piece Count** to set the number of pieces of mail you want to process.
 - A. Type in the number of pieces of mail.
 - B. Select **Accept**.
11. Press the green down arrow key and select **Weight** to enter the weight for a piece of mail.
 - A. Type in the number of pounds a piece of mail weighs. If a piece of mail weighs less than one pound, skip to step B.
 - B. Select **Edit Ounces** and type in the number of ounces a piece of mail weighs.
 - C. Select **Accept**.
12. Once you have finished setting up your manual transaction, select **Done** to save your changes. The system will return to the Home screen
 -  **NOTE:** When you run reports, an M in the Transaction Type column denotes a manual transaction.

Transferring Transaction Data

You can use the Transfer a Transaction option to correct transactions that have been processed against with the wrong account.

1. Press the **Menu** key.
2. Select **Accounts**.
3. Press the green down arrow key and select **Transaction Options**. The Transaction Options screen displays.
4. Select **Transfer A Transaction**. The Select Account screen appears.
5. Select the account you want to transfer the transaction data from. The Select Transactions screen displays.
6. Select the appropriate transaction from the list. If necessary, use the green down arrow key to scroll through the list. The Transaction Details screen displays.
7. Press **Enter**. The Select Account screen displays.
8. Select the account you want to transfer the transaction to. The Confirm Transfer screen displays.
9. Select **Yes, Transfer**.

Clearing the Transaction Log

You can manually clear transaction data if you are receiving warnings that the transaction log is full, or near full.

Refer to *Setting the Condition for the Full Log Warning* in this section for more information about transaction log warnings.

Follow the steps below to clear transaction data:

1. Press the **Menu** key.
2. Select **Accounts**.
3. Press the green down arrow key and select **Transaction Options**. The Transaction Options screen displays.
4. Select **Clear Transaction Log**. The Confirm Clear Transaction Log screen displays.
5. Select **Yes, Delete** to clear the log. The system returns to the Transaction Options screen.

6 • Transaction Options

Setting the Condition for the Full Log Warning

You can set the full log warning to notify you when the transaction log is filled to a certain percentage. The default setting is 80%, which means that when the transaction log is 80% full, you will receive a warning. The lowest setting you can use is 80%. The highest setting you can use is 100%.

Follow the steps below to set the full log warning:

1. Press the **Menu** key.
2. Select **Accounts**.
3. Press the green down arrow key and select **Transaction Options**. The Transaction Options screen displays.
4. Select **Full Log Warning**. The Full Log Percentage to Display Warning Message screen displays.

Full Log Percentage to Display Warning Message
Enter Percentage: <input type="text"/> % (80% to 100%)

5. Enter the percentage (between 80 and 100).
6. Select **Accept**.

Defining the Action to Take When the Log is Full

The Full Log Action option allows you to select the action you want the system to take when the transaction log is full. You can choose to stop processing mail or to process mail and overwrite the transaction log.

Follow the steps below to select the action to take when the log is full:

1. Press the **Menu** key.
2. Select **Accounts**.
3. Press the green down arrow key and select **Transaction Options**. The Transaction Options screen displays.
4. Press the green down arrow key and select **Full Log Action**. The Action When Transaction Log is full screen displays.
5. Select the appropriate option.

6 • *Transaction Options*

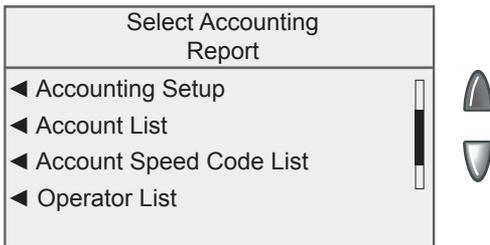
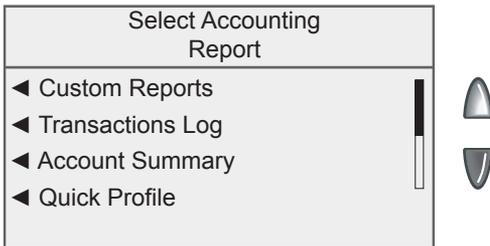
This page was put in as a placeholder so you can print this entire guide in a duplex (double-sided) mode while keeping the proper page positions.

7 • Reports

Accounting Reports Overview

With INVIEW™ Accounting, you have the ability to create a broad range of accounting reports, many more than you would using the standard accounting reports on your mailing system.

The INVIEW™ Accounting reports are accessed by pressing **Menu** and selecting **Reports**, and then **Accounts**.



Account Reporting Options

You can choose what type of accounts (active, inactive, and zero dollar value) to include in your accounting reports.

1. Press the **Menu** key.
2. Select **Accounts**. The Accounts screen displays.
3. Press the green down arrow key to scroll through the menu screens. Select **Reports Account Options**. The Reports Account Options screen displays.



4. Use the selection button to the left of the line to scroll the available settings for each option.

The settings for the "Include" line are:

- *Active/Inactive* - include both active and inactive accounts
- *Active Only* - include active accounts only
- *Inactive Only* - include inactive accounts only

The settings of the "0 Value" line are:

- *Include* - include zero dollar accounts
- *Don't Include* - don't include zero dollar accounts

5. Select **Done** to save your changes.

Transactions Log Report

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

1. Press the **Menu** key
2. Select **Reports**.
3. Select **Accounts**.
4. Select **Transaction Log**. The Select Account to Print screen displays.
5. Select the appropriate account. The Date Range to print screen displays.
6. Select **Start Date**.
 - a. If necessary, press the **C/Back** key to clear the existing date. Use the numeric keys to enter the start date for your report in YYMMDD format.
 - b. Select **Accept** when done.
7. Select **End Date**.
 - a. If necessary, press the **C/Back** key to clear the existing date. Use the numeric keys to enter the end date for your report in YYMMDD format.
 - b. Select **Accept** when done. The report is sent to the printer.

						Page: 1
						Date: 11 01 30
						Time: 3:02P
						Station: 12
Transactions for 11 01 01 to 11 01 30						
Trans ID	Account	Pieces	Postage	Surcharge	Total	Trans Type
1	Shelton	9	5.40	0.45	5.95	I
2	Stamford	24	13.07	1.20	14.27	I
3	Newtown	3	11.55	0.15	11.70	I
Grand Total:						
		43	34.45	1.85	31.92	

7 • Reports

Account Summary

The Account Summary 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.

1. Press the **Menu** key
2. Select **Reports**.
3. Select **Accounts**.
4. Select **Account Summary**. The Select Account to Print screen displays.
5. Select the appropriate account. The Select Period to print screen displays.
 - Select **Current Period** to print the account summary of the current accounting period.
 - Select **Year to Date** to print the account summary from the beginning of the fiscal year to the current date.
 - Select **Previous Periods** to print the account summary for an accounting period that has already ended. The Previous Period to Print screen displays. Select the appropriate date range from the list. If necessary, press the green down arrow key to scroll through the menu screens.

The report is sent to the printer.

				Page: 1
				Date: 11 01 30
				Time: 3:02P
				Station: 12
Account Summary - 11 01 01 to 11 01 30				
<u>Account</u>	<u>Pieces</u>	<u>Postage</u>	<u>Surcharge</u>	<u>Total</u>
WHQ	28	31.03	0.09	31.12
Subtotal:	28	31.03	0.09	31.12
=====				
Grand Total:	28	31.03	0.09	31.12

Quick Profile Report

The Quick Profile report lists the summary of pieces, postage and surcharges for all of the INVIEW™ Accounting accounts.

1. Press the **Menu** key
2. Select **Reports**.
3. Select **Accounts**.
4. Press the green down arrow key.
5. Select **Quick Profile**. The report is sent to the printer.

	Page: 1				
	Date: 11 01 30				
	Time: 3:02P				
	Station: 12				
Quick View for - 11 01 01 to 11 01 30					
<u>Serial No</u>	<u>Pieces</u>	<u>Postage</u>	<u>Surcharge</u>	<u>Discrepancy</u>	<u>Total</u>
8030403	122	344.78	0.05	0.00	344.83
Grand Total:	122	344.78	0.05	0.00	344.83

Accounting Setup Report

The Accounting Setup report lists the options and settings for the INVIEW™ Accounting.

1. Press the **Menu** key
2. Select **Reports**.
3. Select **Accounts**.
4. Press the green down arrow key.
5. Select **Accounting Setup**. The report is sent to the printer.

	Page: 1
	Date: 11 01 30
	Time: 3:02P
	Station: 12
Accounting Setup	
<u>Configuration Item</u>	<u>Value</u>
INVIEW PCN	1FAL
Number of Accounts	13
Accounting Periods	12
Account Passwords	Enable
Default Spend Limit Basis	90 %
Spend Limit	Enable
Operators	Disable
Passwords	Enable
Global Surcharge Method	0
Per Piece Surcharge	+0.000000
Per Transaction	+0.000000
Percentage Surcharge	0 %
Per Piece Surcharge Limit	1.000000
Per Transaction Limit	50.000000
Transaction Warning	90 %
Transaction Full Action	Alert Operator
Owner Name	
Owner Address	

Account List Report

The Account List report lists the accounts that have been defined in the system with speed codes. The accounts are sorted by account name, then by sub account and subsub account.

1. Press the **Menu** key
2. Select **Reports**.
3. Select **Accounts**.
4. Press the green down arrow key.
5. Select **Account List**. The report is sent to the printer.

Account List & Status			
<u>Account</u>	<u>Account Status</u>	<u>Password Required</u>	<u>Account Description</u>
Connecticut	Enable	No	
Bridgeport	Enable	No	District 1
Hartford	Enable	No	District 2
New Haven	Enable	No	District 3
Warehouse	Enable	No	
Danbury	Enable	No	Spare Parts
DMT	Enable	No	Stock
Newtown	Enable	No	Returns

Page: 1
 Date: 11 01 30
 Time: 3:02P
 Station: 12

Account Speed Code List Report

The Account Speed Code List Report lists the accounts that have been defined in the system and the account status. The report is sorted by account speed code. Account speed codes refer to chargeable accounts.

1. Press the **Menu** key
2. Select **Reports**.
3. Select **Accounts**.
4. Press the green down arrow key.
5. Select **Account Speed Code List**. The report is sent to the printer.

Page: 1		
Date: 11 01 30		
Time: 3:02P		
Station: 12		
Account Speed Code List		
<u>Speed</u>		
<u>Code</u>	<u>Account</u>	<u>Description</u>
1	Shelton	Engineering
2	Stamford	WHQ
3	Connecticut - Hartford	District 23
4	Connecticut - New Haven	District 25
5	Connecticut - Bridgeport	District 27

Operator List

The Operator List report lists the operators on the accounting system. This report contains the operator name, ID, status (enabled/disabled), and whether or not report printing is enabled (Y/N).

1. Press the **Menu** key
2. Select **Reports**.
3. Select **Accounts**.
4. Press the green down arrow key.
5. Select **Operator List**. The report is sent to the printer.

NEED REVISED REPORT

Operator List

<u>Operator Name</u>	<u>Op</u>	<u>Status</u>	<u>Reports</u>	<u>Privilege</u>
	<u>ID</u>		<u>Enabled</u>	
Joe	5	Active	Yes	
Lynn	4	Active	Yes	
Mark	1	Active	Yes	Supervisor
Mike	2	Active	Yes	Supervisor
Rushi	3	Active	Yes	

Custom Reports

You can design your own report formats using the Custom Reports feature. This tool allows you to select the report format you want (summary or detailed) as well as select the fields of information you want to appear on the report.

A summary report groups transaction information together by time period. If you select the summary report format you will be able to include any, or all, of the following data in your report:

- Account;
- Pieces;
- Postage;
- Surcharge;
- Total Charge;
- Year to Date Pieces;
- Year to Date Postage;
- Year to Date Surcharge; and
- Year to Date Global Surcharge.

A detailed report outputs specific information about each transaction processed by the system. If you select the detailed report format you will be able to choose from the following data:

- Transaction ID;
- Date of Transaction;
- Time;
- Account;
- Carrier;
- Class/Fee;
- Job ID;
- Operator;
- Total Weight;
- Pieces;
- Postage;
- Surcharge;
- Total Charge; and
- Transaction Type.

Custom Reports

Custom Report Tips:

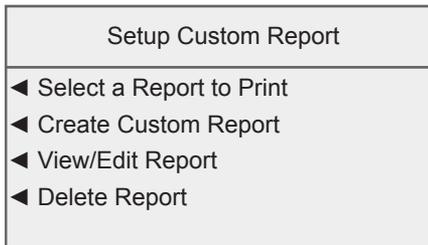
When selecting data to include in the report:

- *OK* displays next to the data name to indicate that it will be used in the report.
 - Each data selection you make will appear as a column in the report.
 - The Available Spaces counter on the top of the screen indicates how much space you have left in the report. You will receive a *No More Space* warning if you select data that exceeds the amount of space the report can take up on the printed page.
-

Creating a Custom Report

Follow the steps below to create a custom report.

1. Press the **Menu** key
2. Select **Reports**.
3. Select **Accounts**. The Select Accounting Reports screen displays.
4. Select **Custom Reports**. The Setup Custom Report screen displays.



5. Select **Create Custom Report**.

i **NOTE:** If this is the first time you are creating a custom report, Create Custom Report is the only available option.

6. Type in the report name and select **Accept**.

Custom Reports

Creating a Custom Report (cont.)

7. Select the appropriate report format:
 - **Detailed** - Transaction level data or
 - **Summary** - Consolidated data.
8. Select the data you want to include in your report from the list. If necessary, press the green down arrow key to scroll through the menu screens. Press **Enter** once you are done selecting data.

Select Data to Include	
Available Space:	0/168
◀ Transaction ID	
◀ Date of Transaction	
◀ Time	
◀ Account	
Enter [Done]	

9. If you selected any data that can be grouped, the Select Data to Group By screen displays. Press the screen keys that correspond with the data you want to group in your report. Press **Enter** once you are done selecting data.
10. The Accounts to Include in the Report screen displays.
 - Select **Prompt Individual Account before printing** to require an operator to select an account before printing the report.
 - Select **Include all accounts** to include all accounts when printing the report.
11. The Report Information screen displays. Select **Done** to save the custom report.

Selecting a Custom Report to Print

Follow the steps below to view select a custom report to print.

1. Press the **Menu** key
2. Select **Reports**.
3. Select **Accounts**. The Select Accounting Reports screen displays.
4. Select **Custom Reports**. The Setup Custom Report screen displays.

Custom Reports

Selecting a Custom Report to Print (cont.)

5. Select **Select a Report to Print**. The Select Custom Report screen displays

Select Custom Report	
◀ Custom Report A	1
◀ Custom Report B	2
◀ Custom Report C	3
◀ Custom Report D	4
(Use Keypad)	



6. Select the appropriate custom report.
- **To select an report manually:** press the green down arrow key to see more choices (if lit). Press the selection key that corresponds with the report you want to print.
 - **To select an report by name:** type in the first few characters of the report name. The list on the screen will show all the reports that start with the characters you have entered. Press the selection key that corresponds with the report you want to use.
 - **To select an report by number:** type in the report number. The screen will display the reports that correspond with the number you typed. Press the selection key that corresponds with the report you want to use.
7. Depending upon the report criteria, you may be prompted to select an account. If necessary, select the appropriate account.
8. If you have selected a detail report, the Date Range to Print screen displays.
- Select **Start Date**.
 - If necessary, press the **C/Back** key to clear the existing date. Use the numeric keys to enter the start date for your report in YYMMDD format.
 - Select **Accept** when done.
 - Select **End Date**.
 - If necessary, press the **C/Back** key to clear the existing date. Use the numeric keys to enter the end date for your report in YYMMDD format.
 - Select **Accept** when done.

Custom Reports

Selecting a Custom Report to Print (cont.)

9. If you have selected a summary report, the Period Range to Print screen displays.
 - a. Select **Start Date** and then select the appropriate period start date from the list.
 - b. Select **End Date** and then select the appropriate period end date from the list.
10. Select **Print to Attached Printer** to print the report.

Viewing and Editing a Custom Report

Follow the steps below to view and/or edit a custom report.

1. Press the **Menu** key
2. Select **Reports**.
3. Select **Accounts**. The Select Accounting Reports screen displays.
4. Select **Custom Reports**. The Setup Custom Report screen displays.
5. Select **View/Edit Report**.
6. Select the custom report you want to view or edit.
7. If you want to use the current report name, select **Accept**. If you want to edit the report name, press the **C/Back** key, type in the new report name and select **Accept**.
8. If necessary, edit the data fields you want to include in your report. Press **Enter** once you are done.
9. If you selected any data that can be grouped, the Select Data to Group By screen displays. Press the screen keys that correspond with the data you want to group in your report. Press **Enter** once you are done selecting data.
10. The Accounts to Include in the Report screen displays.
 - Select **Prompt Individual Account before printing** to require an operator to select an account before printing the report.
 - Select **Include all accounts** to include all accounts when printing the report.
11. The Report Information screen displays. Select **Done** to save the custom report.

Custom Reports

Deleting a Custom Report

Follow the steps below to delete a custom report from the system:

1. Press the **Menu** key
2. Select **Reports**.
3. Select **Accounts**.
4. Select **Custom Reports**.
5. Select **Delete Report**.
6. Select the custom report you want to delete. The Delete Custom Report screen displays.
7. Select **Yes** to delete the report.

This page was put in as a placeholder so you can print this entire guide in a duplex (double-sided) mode while keeping the proper page positions.

8 • Closing Out Fiscal Periods

Overview

When an accounting period ends (monthly, quarterly, annual, etc.), we recommend you print reports and/or transfer your data.

i NOTE 1: The system does not display a message at the end of the period, only at the end of a *year*.

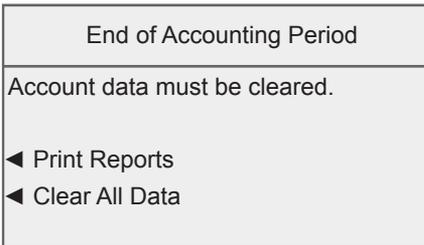
i NOTE 2: Before sure to print reports and/or transfer data to PC Transfer before clearing any data.

Closing Out a Fiscal Year

Standard Accounting Periods

At the end of the fiscal year, the following message will appear on the bottom of the Home screen: *Acct Period Ended*. Accounting data must be cleared and the period must be reset before you can continue processing mail.

1. Select **Account**. The End of Accounting Period screen displays.
2. Select **Print Reports**. Follow the prompts to print a copy of each report. Alternately, or in addition to printing reports, transfer all data using PC Transfer.



i **NOTE:** It is important to print out and/or transfer data because all data will be permanently deleted in the next step.

3. Once you have finished printing reports and/or transferring data, return to the Home screen and select **Account**. The End of Accounting Period screen displays.
4. Select **Clear All Data**. The Confirm Clear Account Data screen displays.
5. Select **Yes** to clear the data. Once the account data is cleared, the Accounts Setup menu displays.
6. Press the green down arrow key and select **Acct Period**. The Accounting Period screen displays. Refer to *Setting the Accounting Period* in this section to set up the accounting period for the new fiscal year.

Closing Out a Fiscal Year

Custom Accounting Periods

At the end of each custom accounting period, the following message will appear on the bottom of the Home screen: *Acct Period Ended*. You must clear the account data, extend the end date, or both before you can continue processing mail.

1. Select **Account**. The End of Accounting Period screen displays.
2. Select **Print Reports**. Follow the prompts to print a copy of each report. Alternately, or in addition to printing reports, transfer all data using PC Transfer.

End of Accounting Period
Account data must be cleared. ◀ Print Reports ◀ Clear All Data ◀ Extend Period

- i NOTE:** If you are at the end of the second custom period, it is important to print out and/or transfer data. All data will be permanently deleted in the next step.
3. Once you have finished printing reports and/or transferring data, return to the Home screen and select **Account**. The End of Accounting screen displays.
 4. If you want to extend the end date, select **Extend Period**.
 - a. Select **End Date 1** to set the end date for the first custom period. If necessary, press the **C\Back** key to clear the existing date. Type in the date in YYMMDD format and select **Accept**.
 - b. Select **End Date 2** to set the end date for the second custom period. If necessary, press the **C\Back** key to clear the existing date. Type in the date in YYMMDD format and select **Accept**.
 - c. Select **Done**. The Accounting Period screen displays.
 - d. Press **Enter** to save your changes.
 - e. Press **Home** to return to the Home screen.

8 • Closing Out Fiscal Periods

Closing Out a Fiscal Year

Custom Accounting Periods (cont.)

6. Select **Account**. The End of Accounting Period screen displays.
7. If you want to clear account data, select **Clear All Data**. The Confirm Clear Account Data screen displays.
8. Select **Clear All Data** to remove all account data from the system, or select **Clear Period Data** to remove the account data for the current custom period.

Clear Account Data
◀ Print Reports
◀ Clear All Data
◀ Clear Period Data

9. Select **Yes** to clear the data. Once the account data is cleared, the Accounts Setup menu displays.

9 • Troubleshooting

Troubleshooting INVIEW™ Accounting

This chapter contains a list of problems you may encounter while using INVIEW™ Accounting.

Refer to the *Chapter 12, Troubleshooting* in the DM300c/DM400c/DM475 Operator Guide for information on problems you may encounter while using the mailing system (for example, envelope sealing problems, envelope feeding problems, tape feeding problems, etc.).

Review the problems listed in both chapters. If you are unable to find a solution, refer to the *Pitney Bowes Contact List* at the front of this guide for the phone number of the Help Desk and the web site addresses.

Error Message/ Warning	Take This Action
Cannot Create New Account No space available for new accounts.	Select Delete Existing Account . Follow the prompts to delete an account from the system.
Cannot Delete Account First delete sub accounts.	You must delete all sub and subsubaccounts, starting at the lowest chargeable level, before deleting a first level account.
Cannot Save Manual Transaction Missing information.	Select Return to Adding Trans . Ensure that, at a minimum, the following selections are made: Account, Pieces, Postage and Weight.
Accounting Discrepancy <postage amount> Has been spent without being recorded.	<ul style="list-style-type: none">• Select Make a Manual Transaction to continue running mail. The Manual Transaction screen is displayed with the postage amount equal to the amount listed on the Account Discrepancy screen. Refer to <i>Chapter 5, Transaction Options, Adding Manual Transactions</i> for more information.• Select Ignore to stop running mail. The system returns to the Home screen.

Troubleshooting INVIEW™ Accounting

Error Message/ Warning	Take This Action
<p>External memory not responding. Please check the USB and memory device connections. Run mail without accounting?</p> <p> NOTE: We do not recommend running mail without accounting.</p>	<p>Check the USB and memory device to ensure they are properly connected.</p> <ul style="list-style-type: none">• Select Try to Reconnect if you want to recheck the device connections. The <i>Please Wait</i> screen is displayed as the system tries to reestablish the connection.• Select Turn Accounting OFF to run mail without accounting. This operation requires supervisor access privileges.• Cycle AC power on the meter. <p>If the problem persists, refer to the <i>Pitney Bowes Contact Information List</i> at the front of this guide for the phone number of the Help Desk and the web site addresses.</p>
<p>Accounting Register Full</p>	<ul style="list-style-type: none">• Select Print Report to print a report with the Accounting Register information.• Select Reset to reset the accounting register.

Troubleshooting INVIEW™ Accounting

Error Message/ Warning	Take This Action
<p>Format Your Flash Drive: While troubleshooting an issue, a Pitney Bowes Customer Support representative instructs you to format your flash drive.</p>	<p>To format your flash drive:</p> <ol style="list-style-type: none"> 1. Attach the flash drive to an available USB port on the machine. <p>i NOTE: Connect it directly to a port on the machine, do NOT connect it via a USB hub!</p> 2. Press the Options key. 3. Scroll to and select Advanced Features. 4. Select InView Records. 5. Select Erase memory stick. 6. Press the Yes key. <p>The screen will display <i>Please Wait...</i> for 5 to 15 minutes and the LED on the flash drive will flicker.</p> <p>IMPORTANT: Do NOT disconnect the flash drive during this procedure! Doing so will damage the flash drive!</p> <p>When complete, the screen will display <i>Memory stick successfully erased</i>.</p> 7. Select Continue.

This page was put in as a placeholder so you can print this entire guide in a duplex (double-sided) mode while keeping the proper page positions.

A

- Accounting. *See* Accounts
- Accounting, Overview on Mailing System 1-2
- Accounting Period, Setting Up Starting & Ending 4-14
- Accounting Reports. *See* Reports
- Accounting Reports Option of INVIEW Meter Reporting 1-4
- Accounting Setup Report 7-12
- Accounting Type, Selecting 4-6
- Account List Report 7-13
- Accounts
 - Auto Clearing a Job ID 4-24
 - Clearing Account Data 4-13
 - Clearing All Surcharges 4-21
 - Creating a New Account 4-7
 - Creating a Sub Account or SubSub Account 4-9
 - Custom Accounting Periods 4-17
 - Deleting an Account 4-10
 - Editing Accounts 4-11
 - Ending Accounting Periods 4-16
 - Report Accounting Options 4-25
 - Requiring a Job ID 4-23
 - Selecting a Job ID Requirement 4-23
 - Selecting an Account 5-3
 - Selecting the Accounting Type 4-6
 - Selecting the Surcharge Method 4-19
 - Setting the Accounting Period 4-14
 - Setting Up the PC Transfer Utility 4-12

- Standard Accounting Periods 4-16
- Structure 4-4
- Turning Surcharges On and Off 4-22
- Viewing Accounts 4-11
- Account Speed Code List Report 7-14
- Account Summary Report 7-10

B

- Barcode Scanner (optional)
 - Adding Barcode Prefixes 2-8
 - Combining Barcodes 2-6
 - Configuring 2-4
 - Default Scan Type 2-4
 - Setting Auto Enter 2-5
- Batch surcharge 5-5
- Budget Manager 1-2, 1-4
- Business Manager 1-2, 1-4

C

- Contact Information, Pitney Bowes iii
- Custom Reports 7-3

H

- Help Resources iii
- High level Warning, Transactions Log 6-7

I

- INVIEW Accounting Overview 1-2
- INVIEW Meter Reporting 1-3

J

- Job ID
 - autoclearing at end of transaction 4-24
 - requiring to run mail 4-23
 - selecting 5-7

L

- Log Full Warning, Transactions Log 6-7

M

- Machine Identification, When Submitting a Problem iii
- Manual Transactions, setting log full warning 6-7
- Model Number, When Submitting a Problem iii

O

- Operator List Report 7-15
- Operators, INVIEW Accounting
 - Creating Operators 3-3
 - Deleting Operators 3-6
 - Enabling and Disabling Operators 3-7
 - Enabling Operator Passwords 3-7
 - Logging Off Automatically 3-8
 - Options 3-2
 - Viewing and Editing Operators 3-4
- Overview of Manual 1-5

P

- PC Transfer Utility, setting up 4-12
- Presets, Setting Up 2-2
- Product Name iii

Q

- Quick Profile Report 7-11

R

- Reports
 - Accounting Reports Overview 7-2
 - Accounting Setup Report 7-12
 - Account List Report 7-13
 - Account Speed Code List Report 7-14
 - Account Summary 7-10
 - Creating a Custom Report 7-4
 - Custom Reports 7-3
 - Deleting a Custom Report 7-8
 - Operator List 7-15
 - Quick Profile Report 7-11
 - Selecting a Custom Report to Print 7-5
 - Transactions Log Report 7-9
 - Viewing and Editing a Custom Report 7-7
- Running Mail
 - Applying Postage 5-4
 - Entering a Batch Surcharge or Discount 5-5
 - Home Screen with INVIEW Accounting Activated 5-2
 - Selecting a Class or Special Service 5-4
 - Selecting a Job ID 5-7
 - Selecting an Account to Track Postage 5-3

S

- Station ID, Setting Up 2-3
- Supervisor Password, Setting Up 2-2
- Surcharges
 - per piece 4-20
 - per transaction 4-20
 - per transaction percentage 4-20

T

- Tracking postage using an account 5-3
- Transaction Options
 - Adding a Manual Transaction 6-3
 - Clearing the Transaction Log 6-6
 - Defining the Action to Take When the Log is Full 6-8
 - Overview 6-2
 - Printing the Transaction Log 6-3
 - Setting the Condition for the Full Log Warning 6-7
 - Transferring Transaction Data 6-5
- Transactions Log Report 7-9
- Troubleshooting INVIEW Accounting 8-2

This page was put in as a placeholder so you can print this entire guide in a duplex (double-sided) mode while keeping the proper page positions.



5500 Explorer Drive
Mississauga, Ontario L4W 5C7
www.pitneybowes.ca

For Service or Supplies

PB Form SV62683 Rev. A 6/11
© 2011 Pitney Bowes Inc.
All Rights Reserved



* S V 6 2 6 8 3 R E V A *