



INVIEW™ Accounting for DM Series™ Digital Mailing Systems

Models: DM500™, DM550™, DM800i™, DM800™, DM900™, DM1000™



Operator Guide

US English Version

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Pitney Bowes Contact Information List

PB Web Sites

- For frequently asked questions, go to:
<http://www.pb.com>
- To place requests for service or training, go to:
*<http://www.pb.com> and click on **My Account**.*
- To order PB supplies and accessories, go to:
*<http://www.pb.com> and click on **Online Store**.*
- To view and pay invoices online, go to:
*<http://www.pb.com> and click on **My Account**.*
- To view inventory, go to:
*<http://www.pb.com> and click on **My Account**.*
- To add postage to your Postage By Phone® Meter Payment System account, go to:
*<http://www.pb.com> and click on **Add Postage to Your Meter**.*

Our Help Desk

For direct questions, call: 1.800.522.0020. Customer Service Representatives are available Monday through Friday, 8AM - 8:00PM EST.

Postage By Phone® System

To contact, call 1.800.243.7800

Pitney Bowes Supplies

To order Pitney Bowes approved supplies, call our PB Supply Line™ at 1.800.243.7824.

1 • Read this First

This chapter lists the key features of your mailing system, tells you what's in this book, and presents important safety information.

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About This Guide

Depending on the task you want to perform, refer to the appropriate chapter in this guide:

Chapter 2 - Setting Up Your Mailing System for Budget Manager explains how to use the setup options unique to Budget Manager to change or customize your mailing system.

Chapter 3 - Setting Up Operators describes how to create, edit and delete operators.

Chapter 4 - Setting Up Accounts describes how to configure your accounting system.

Chapter 5 - Working with Accounts tells you how to set up individual Budget Manager accounts, and edit and delete existing accounts.

Chapter 6 - Running Mail describes how to run mail using the various accounting features of Budget Manager.

Chapter 7 - Manual Transactions describes how to enter manual transactions and how to view, clear or void transactions.

Chapter 8 - Running Reports describes how to run accounting reports provided with your system and how to create customized accounting reports for your organization.

Chapter 9 - Troubleshooting describes how to handle any accounting errors or warnings you may encounter on your system.

Other Sources of Information

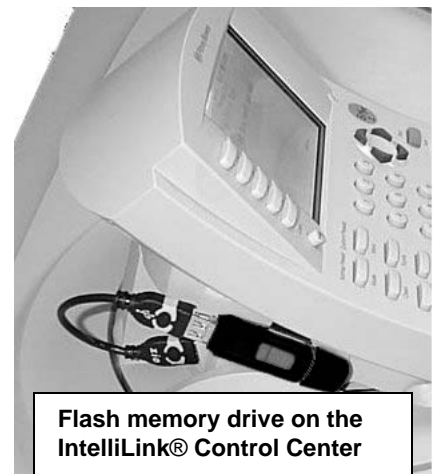
If you have any questions about features other than accounting (including adding postage or adding features), refer to the Operator Guide supplied with your mailing system.

- If you have a DM500™, DM550™ Digital Mailing System, refer to SV61346.
- If you have a DM800i™ Digital Mailing System, refer to SV61162.
- If you have a DM800™, DM900™ Digital Mailing System, refer to SV60861.
- If you have a DM1000™ Digital Mailing System, refer to SV60951.

Before You Begin

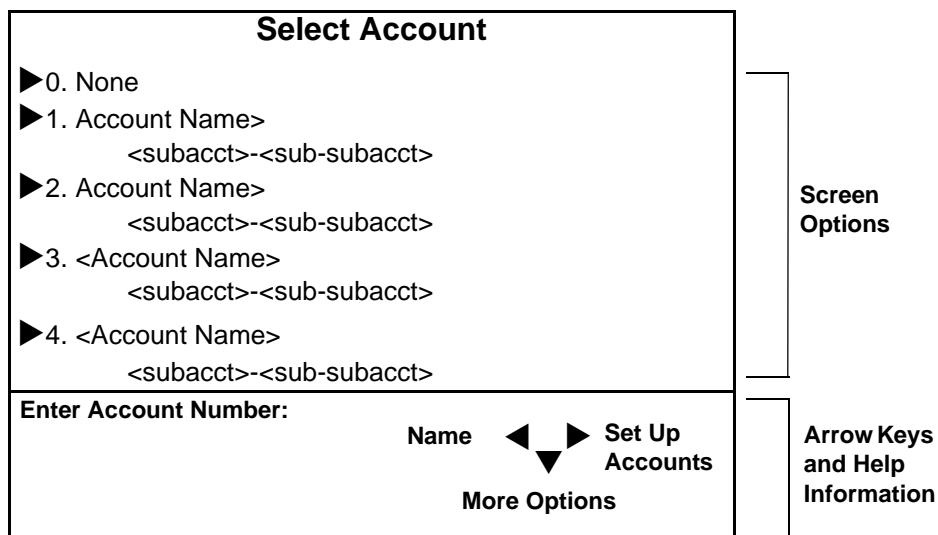
Make sure the flash memory drive required to run INVIEW™ Accounting is installed on the IntelliLink® Control Center on your DM Series™ system as shown in the picture here.

If the flash memory is not installed, contact your Pitney Bowes service representative.



Navigating Hints

- You can access all of the INVIEW™ Accounting features by pressing the **Accounts** key on the IntelliLink® Control Center. The system displays the account names in the format shown here:



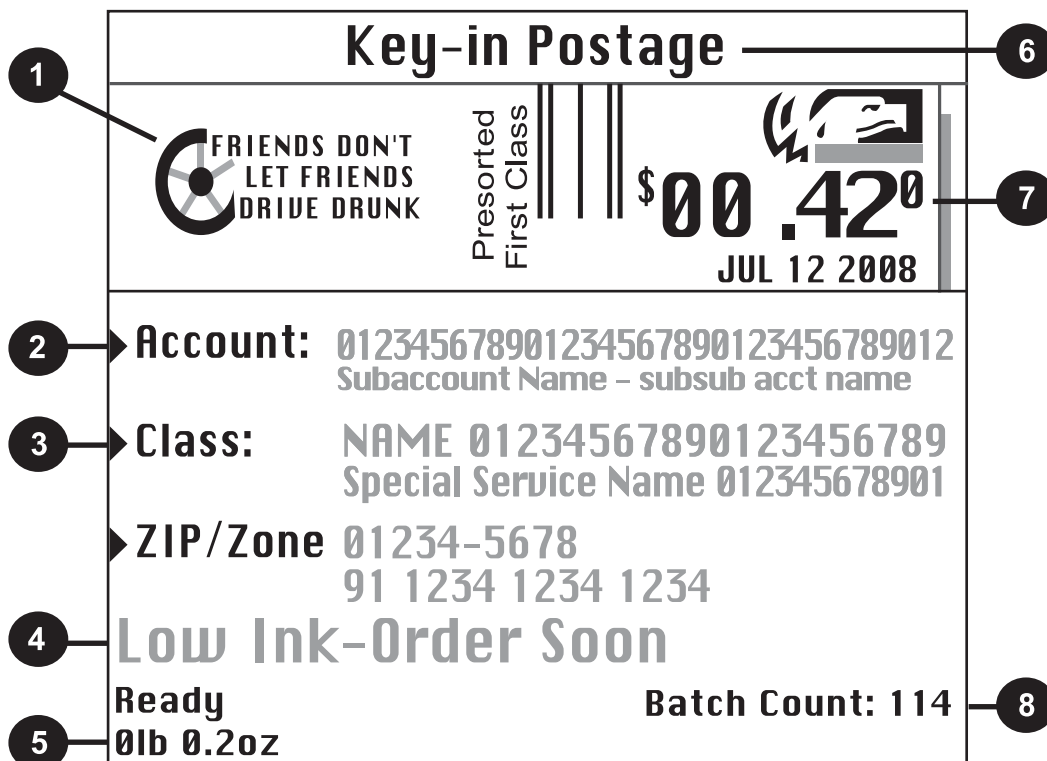
- To enter the INVIEW™ account set up mode, press the right arrow key on the control center as indicated by the help information on the bottom on the right side of the main screen.
- The maximum number of options displayed is 5. To view more options, press the down arrow key.
- You can select a numbered option either by pressing the screen key next to the option, or by pressing the corresponding number on the keyboard and then pressing the **Enter** key.
- Pressing the left arrow key returns you to the main screen.

The Main Screen

The content of the main screen depends upon the current mode of the machine. Main screens are the only screens that contain a meter stamp replica area and a main status area.

The main screen enters a sleep mode after a certain period of inactivity. Pressing any key wakes up the system and shows the last screen on the display, or the one corresponding to the Normal Preset settings (refer to *Define Presets* in *Chapter 5* of your mailing system operator guide for more information).

- 1 **Advertisement Display** - The optional message to be printed on the envelopes or tape (if selected).
- 2 **Account** - The optional account number or name charged with postage.
- 3 **Class** - The class you selected for the piece of mail.
- 4 **Main Status Area** - Important information such as warnings or help or navigation tips. For example, if you select a class, a message appears in this area.
- 5 **Weight Display Area** - The weight of the piece of mail.
- 6 **Mode** - The mode in which the piece of mail will be processed, or what the next required action will be.
- 7 **Meter Stamp** - The official USPS indicia printed on the envelope or tape.
- 8 **Batch Count** - The number of pieces of mail run in a job.



2 • Setting Up the Mailing System for INVIEW™ Accounting

This section 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.

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Setting the Accounting Period

When you enter the start date for the fiscal year, the system automatically determines the end date. (For example, if January 1, 2008 is the beginning of your fiscal year, the system sets the end date as December 31, 2008.)

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 up to two custom account periods.

Follow the steps below to set your fiscal year and select the type of accounting period you will use:

1. Press the **Menu** key.
2. Select **Set Up, Accounting Set Up**, then **Accounting Period**. The Accounting Periods screen appears.
3. Select **Fiscal Year Start**.
 - a. Type in the start date of your fiscal year.

NOTES:

- You can enter a start date that is within the current year. For example, if today's date is 1/20/2008, you can enter a start date back to 1/20/2008. When you enter the year, be sure to enter the full 4-digit year (e.g., 2008).
 - Once you run a transaction you cannot change the start date of the fiscal year until you clear the accounting data, or the fiscal year ends.
-

- b. Press **Enter** to save the date. The Accounting Periods screen reappears.
 4. Select **Number of Periods**.
 - a. Select the number periods for your fiscal year. Use the down arrow key to scroll through the list, if necessary.
 - b. b.If you select one of the preset periods, press **Enter** to return to the Accounting Set Up menu, then press the left arrow key to exit the set up.
 - c. If you select **Custom** period, the Custom Period screen appears. Go to step 5.
 5. 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. Key in the date and press **Enter**.
 - b. Select **End Date 2** and set the end date for the second custom period. The end date for the second period must always be the same as, or after the end date for the first period. Press **Enter**.
 6. Press the left arrow key to exit set up.

NOTES for Custom Periods:

- For custom periods only, you can extend the end dates at any time during the period. The end date for custom period 2 must always be the same as custom period 1, or after custom period 1.
 - Once the end date 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.
 - When the period expires, you will not be allowed to run mail until you either clear the data or extend the period.
-

Setting Up a Global Surcharge or Discount

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

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 -1.00 to 1.00.
- 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, or a surcharge that is customized for a specific transaction, see *Running Mail, Entering a Surcharge* in this chapter.

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

1. Press the **Menu** key.
2. Select **Set Up**, then **Accounting Set Up**. The Setup Accounting screen appears.
3. If necessary, select **Surcharge** to toggle the Surcharge feature on.
4. Select **Global Surcharge**.
5. 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.
 - c. If necessary, select **Change To A Discount** to apply a discount or **Change To A Surcharge** to apply a surcharge.
 - d. Press **Enter**.
6. 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 individual piece of mail.
 - c. If necessary, select **Change To A Discount** to apply a discount or **Change To A Surcharge** to apply a surcharge.
 - d. Press **Enter**.
7. To add a surcharge or discount per transaction percentage:
 - a. Select **Per Transaction Percentage**.
 - b. Type in the surcharge or discount percentage you wish to use for each individual piece of mail.
 - c. If necessary, select **Change To A Discount** to apply a discount or **Change To A Surcharge** to apply a surcharge.
 - d. Press **Enter**.
8. Press the left arrow key to exit set up.

Selecting an Accounting Type

Follow the procedure below to select an accounting type, or to disable the accounting feature on your mailing system.



CAUTION: If you switch from one accounting system to another, you will lose all of the data in the original accounting system.

1. Press the **Accounts** key.
 2. Press the right arrow key to enter the “Set up Account” screen.
 3. Press the down arrow key to press the down arrow key and select **Accounting**.
-

NOTE: The type of accounting currently set for your system is displayed next to the Accounting selection.

4. Depending on the option(s) you purchased, you can select from the following options:
 - To disable the current accounting, select **Off**.
 - To enable INVIEW™ accounting provided with your system, select **INVIEW**.
 - If you have purchased Business Manager, select **Business Manager**.
 - If you have purchased Budget Manager, select **Budget Manager**.
 - If you have an AccuTrac SA connected to your system, select **AccuTrac**.

Setting the INVIEW™ Accounting Owner

Follow the steps below to enter information about the owner of the INVIEW™ Accounting system.

1. Press the **Menu** key.
2. Select **Set Up**, then select **Accounting Set Up**.
3. Use the down arrow key to scroll through the menu options, then select **Owner**.
4. Select **Name**. Type in the owner’s name and press **Enter**.
5. Select **Address 1**. Type in the address information (e.g. the street address) and press **Enter**.
6. Select **Address 2**. Type in any additional address information and press **Enter**.
7. Press **Enter** to save the owner information.
8. Press the left arrow key to exit setup and return to the Main screen.

Turning INVIEW™ Account Passwords On or Off

By turning passwords on, you can protect each account from unauthorized access.

NOTE: Before you can turn account password protection on or off, you need enable the supervisor password protection feature. Refer to *Setting up a Supervisor Password* in *Chapter 4* of your mailing system operating guide for more information.

To turn account passwords on or off:

1. Press the **Menu** key.
2. Select **Set Up**, then select **Accounting Set Up**.
3. Use the down arrow key to scroll through the menu options, then select **Account Passwords** to toggle the feature On or Off.

Turning Weight Breaks On or Off

Follow the steps below to turn weight breaks on or off.

1. Press the **Menu** key.
2. Select **Set Up**, then select **Accounting Set Up**.
3. Use the down arrow key to scroll through the menu options, then select **Weight Breaks** to toggle the feature On or Off.

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.

Station IDs are numeric and must be two characters in length.

Follow the step below to set a Station ID:

1. Press the **Menu** key.
2. Select **Set Up**, then select **Accounting Set Up**.
3. Use the down arrow key to scroll through the menu options, then select **Set Station ID**.
4. Type in the Station ID and press **Enter**.
5. Press the left arrow key to return to the Main screen.

Selecting Job ID Requirements

The DM Series™ mailing system has the ability to track mail runs using Job IDs. 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 Job IDs

You can set up the system to require Job IDs in order to process mail. To require Job IDs:

1. Press the **Menu** key.
2. Select **Set Up**, then **Accounting Set Up**.
3. Press the down arrow key twice.
4. Select **Job ID Setup**.
5. Select **Job ID Required** to toggle this option on/off.
6. Press **Enter** when done.

Autoclearing Job IDs

You can set up the system to automatically clear Job IDs at the end of each transaction. To autoclear Job IDs:

1. Press the **Menu** key.
2. Select **Set Up**, then **Accounting Set Up**.
3. Press the down arrow key twice.
4. Select **Job ID Setup**.
5. Select **Job ID Autoclear** to toggle this option on/off.
6. Press **Enter** when done.

Reporting Options

Including Active and Inactive Accounts

When you select the Include Active and Inactive option on the Reporting Options menu, you can choose which types of accounts appear in INVIEW™ Accounting reports: Active and Inactive, Active Only, or Inactive Only.

1. Press the **Menu** key.
2. Select **Setup**, then **Accounting Set Up**.
3. Select **Report Options**. The Report Account Options screen appears.
4. Select **Include Active and Inactive**.
5. Select the type of accounts you want to include:
 - Active and Inactive
 - Active Only
 - Inactive Only
6. Press **Enter** when done.

Including Zero Values

When you select the Zero Value option on the Reporting Options menu, you can choose whether or not to include accounts with no charges for the reporting period in reports.

1. Press the **Menu** key.
2. Select **Setup**, then **Accounting Set Up**.
3. Select **Report Options**. The Report Account Options screen appears.
4. Select **Zero Value**.
5. Select the appropriate option: Include or Don't Include.
6. Press **Enter**.
7. Press **Enter** when done.

Clearing Account Data

Follow the steps below to clear the account data.



CAUTION: Clearing the account data will permanently erase all transaction and summary data. It is typically only done at the end of the fiscal year.

1. Press the **Menu** key.
2. Select **Set Up**, then **Accounting Set Up**. Use the down arrow key to scroll through the list of accounting set up options.
3. Select **Clear Account Data**.
4. Select **Clear Data**.
5. Select **Yes**.
6. Press the left arrow key to exit set up.

3 • Setting Up Operators

This section contains the basic instructions necessary to set up and maintain operators on your mailing system.

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Overview

The procedures in this chapter allow you to set up your mailing system so that you can assign operators and require each operator to enter his or her operator ID and password.

A supervisor password is required to access the Operators menu. Refer to *Setting Up a Supervisor Password* in Chapter 5 of your mailing system operator guide.

- If a supervisor password has not been enabled, you will be prompted to create a supervisor password before you can access the Operators menu.
- If a supervisor password has been enabled, then you will need supervisor privileges to access the Operators menu.

NOTE: If you do not have supervisor privileges, 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.

Enabling Operators

Follow the steps here to set up your mailing system so that you can assign operators and require each operator to enter his or her ID and password.

You will need supervisor privileges to complete this operation.

1. Press the **Menu** key.
2. Select **Set Up**, then select **Basic Settings**.
3. Press the down arrow key and select **Operators**.

NOTE: If you do not have supervisor privileges, 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.

Enabling Operator Passwords

Follow the steps here to require each operator to enter his or her password when they log onto the system.

You will need supervisor privileges to complete this operation.

1. Press the **Menu** key.
2. Select **Set Up**, then select **Basic Settings**.
3. Press the down arrow key and select **Operators**.

NOTE: If you do not have supervisor privileges, 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 screen key for the **Operators Passwords** selection to toggle between On and Off.

This change will take effect the next time you or another operator logs on to 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.

This operation requires that you have supervisor privileges.

1. Press the **Menu** key.
2. Select **Set Up**, then select **Basic Settings**.
3. Press the down arrow key and select **Operators**.

NOTE: If you do not have supervisor privileges, 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 **Create Operator**.
5. Type in the operator name and press **Enter**.
6. Type in the operator password and press **Enter**.
7. Type in the operator password a second time and press **Enter**. The Operator Information screen appears.
 - Select **Name** to edit the operator name. Type in your changes and press **Enter**.
 - Select **Status** to toggle the operator active or inactive.
 - Select **Password** to change the operator password. Type in the operator password and press **Enter**.

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.)

- Select **Report Printing** to toggle between enabling and disabling report printing capabilities for the operator.
 - Select **Access Level** to toggle between operator and supervisor access privileges.
8. Press **Enter** to save your changes.
 9. Press the left arrow key to return to the Main screen.

Setting Operator Auto Log Off

You can set up your system so that operators are automatically logged out of INVIEWS™ Accounting after a certain period of inactivity. The period of inactivity is defined by the Display Sleep timeout value. For more information on the Display Sleep timeout refer to the *System Setup* chapter in your DM Series™ Digital Mailing System operator guide.

1. Press the **Menu** key.
2. Select **Set Up**, then select **Basic Settings**.
3. Press the down arrow key and select **Operators**.

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 **Auto Log Off**.
 - If the feature was not previously enabled, selecting Auto Log Off enables it and "On" appears next to the Auto Log Off selection.
 - If the feature was previously enabled, selecting Auto Log Off disables it and "Off" appears next to the Auto Log Off selection.
5. Press the left arrow key to return to the Main screen.

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.

1. Press the **Menu** key.
2. Select **Set Up**, then select **Basic Settings**.
3. Press the down arrow key and select **Operators**.
4. Select **Delete Operator**. The Select Operator screen appears.

NOTE: If you do not have supervisor privileges, 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.

5. Select the operator you wish to delete, or type in the operator name and press **Enter**. The Delete Operator screen appears.
6. Select **Yes**.
7. Press the left arrow key to return to the Main screen.

Viewing and Editing Operators

The Viewing/Editing Operators screen allows you to access operator-specific information that has been entered into INVIEW™ accounts. 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.

1. Press the **Menu** key.
2. Select **Set Up**, then select **Basic Settings**.
3. Press the down arrow key and select **Operators**.

NOTE: If you do not have supervisor privileges, 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**.
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.
 - Select **Name** to edit the operator name. Type in your changes to the operator name and press **Enter**.
 - Select **Status** to toggle between locking and unlocking the operator.
 - Select **Password** to edit the operator password. Type in the operator password and press **Enter**.
 - Select **Report Printing** to toggle between enabling and disabling report printing capabilities for the operator.
 - Select **Access Level** to toggle between operator and supervisor access privileges.
6. Press **Enter** to save your changes.
7. Press the left arrow key to return to the Main screen.

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

Disabling Operators

Follow the steps here to if you will no longer require a valid operator ID and password to log on to

1. Press the **Menu** key.
2. Select **Set Up**, then select **Basic Settings**.
3. Press the down arrow key and select **Operators**.

NOTE: If you do not have supervisor privileges, 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.

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4 • Working with INVUEW™ Accounts

This section contains the basic instructions necessary to set up and maintain accounts on your mailing system.

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INVIEW™ Accounting Account 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, subaccount, and subsubaccount. You can create a total of 50, 100 or 300 INVIEW™ accounts.

When accounts are linked (account-subaccount, or account-subaccount-subsubaccount) 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 subaccount when the first subaccount is created. When you create another subaccount to this account, you create another linked set of accounts with a different account number and password.

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

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 subaccounts for the original account, they become the end links in the account chain and identify the departments where you charge to:

Examples:

Account - Engineering, Subaccount - Software

Account - Engineering, Subaccount - Industrial Design

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

- If you create subsubaccounts for subaccounts, the subsubaccounts become the end links and identify the departments that are charged for postage.

Examples:

Account - Engineering, Subaccount - Software,

Subsubaccount - Software Testing

Account - Engineering, Subaccount - Software,

Subsubaccount - Software Design

Account - Engineering, Subaccount - Industrial Design,

Subsubaccount - Graphics and Layout

Account - Engineering, Subaccount - Industrial Design,

Subsubaccount - User Friendly Testing

Creating an Account

Follow the steps below to create an account:

1. Press the **Accounts** key.
2. Press the right arrow key to enter the Set Up Accounts screen.

NOTE: If this is the first account on the system, skip to step 3.

3. Select **Create Account**.
4. Select **Create a New Account**. The system prompts you to enter an account name.

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. Type in the name using the keyboard or numeric keypad and press **Enter**. The Account Information screen appears.
6. Select the appropriate option and follow the prompts.
 - **Name:** Select this option to edit the name of an account.
 - **Speed Code:** 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. Select this option to change the speed code number assigned by the system.
 - **Password:** The account password is a four digit number that you can assign to limit access to an account. As soon as you enter the name of your account, the system will request that you enter the account password if it is enabled. Select this option to assign, change or disable the password if necessary. When you are running mail, passwords must be globally enabled.
 - **Create Another Account:** Select this option to add another account, subaccount or subsubaccount to the system.
 - **Add Subaccount to:** Select this option to add a subaccount to your new account.
 - **Description:** This option allows you to type in a brief description of the account.
7. When you are done, press the right arrow key to save your account information. If you press the **Clear** key or the left arrow key during this process the system will ask you if you want to save your changes.

Creating an Subaccount or Subsubaccount

Any data charged to the existing account will be transferred to the subaccount or subsubaccount you create.

1. Press the **Accounts** key.
2. Press the right arrow key to enter the Set Up Accounts screen.
3. Select **Create Account or SubAccount**.
4. Select **Add to an Existing Account** to enter the Select Account screen. The system displays a list of all the existing accounts.
5. Select the appropriate account or subaccount. If necessary, press the down arrow to scroll through the list.
6. Type in the name of the new subaccount or subsubaccount and press **Enter**. The Account Information screen appears.
7. Select the appropriate option and follow the prompts.
8. When you are done, press **Enter** to save the account information.
9. Press the left arrow key to exit set up.

Viewing or Editing an Account

You can view or edit the account name, status, spending limit, owner information and description for all of the accounts entered into INVIEW™ Accounting.

1. Press the **Accounts** key.
2. Press the right arrow key to enter the Set Up Accounts screen.
3. Select **View/Edit Accounts**.
4. Select the account you want to view and/or edit by pressing the screen key that corresponds with the account name, *or* type in the account name and press **Enter**. The View/Edit Accounts screen appears.
5. Select the appropriate option and follow the prompts.
 - **Edit Account Name:** Select this option to make changes to the name of the account you have selected.
 - **Change Speed Code:** Select this option to change the speed code number assigned by the system.
 - **Status:** Once you have added an account to the system, you can set the account active or inactive. Active status is the default setting for all accounts. If you have an account that you no longer wish to use, you can set the status to inactive. The inactive account will remain on the system, but you will not be able to process transactions against it.
 - **Password:** The account password is a four digit number that limits access to an account.
 - **Description:** Select this option to edit the account description.
6. Once you have finished viewing and/or editing the account information, press **Enter** to exit the View/Edit Accounts screen.
7. Press the left arrow key to return to the Main screen.

Deleting an Account

An account that contains data cannot be deleted until data is cleared or the current period ends.

An account that contains data can be toggled inactive if it will no longer be used.

1. Press the **Accounts** key.
2. Press the right arrow key to enter the "Set Up Account" screen.
3. Select **Delete Account**.
4. Select the account you want to delete.

NOTES:

- You can only select a chargeable account to delete. The selected account, subaccount and/or subsub-account, along with its postage and pieces of mail is deleted.
- The subaccounts appear in the display as two separate accounts under the main account title:

Engineering
Software
Engineering
Industrial Design

-
5. As soon as you select an account, the system prompts you to print a report. To keep a record of your account data, select **Print Report**.
 6. Select **Delete** to remove the account from the system.
 7. Press the left arrow key to return to the main screen.

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5 • *Running Mail*

This section describes unique features available when running mail with INVIEW™ Accounting. Refer to the *Running Mail* chapter in your mailing system operating guide for complete directions on how to run mail.

<i>Selecting or Deselecting an Account</i>	<i>5-2</i>
<i>Selecting an Account in Seal Only Mode</i>	<i>5-5</i>
<i>Entering a Batch Surcharge</i>	<i>5-5</i>
<i>Selecting a Job ID</i>	<i>5-6</i>

Selecting or Deselecting an Account

If you use INVIEW™ Accounting, you must select an account for every transaction.

Selecting an Account

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 speed code, you can use the account name search or the speed code search to locate the account you want to use.

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

NOTES:

- You can use the left arrow key to toggle between the account name and speed code search methods on the Select Account screen.
 - When you select an account by name or by speed code, the search setting remains in effect even after you leave the Select Account screen. The next time you select an account, the last search method you used will be active.
-

Selecting an Account Manually

Follow the steps below to select an account:

1. Press the **Account** screen key. The Select Account screen appears listing all of your accounts.
2. Select the Account you want to use to charge postage. Use the down arrow key to scroll through the Account list, then press the screen key that corresponds with the account name.
3. If the Account password is enabled, the Enter Account Password screen appears. If the Account password is not enabled, go to step 4.
 - a. Type in the password.
 - b. Press **Enter**.
4. The system returns to the Main screen. The name of the account you selected appears in the Account field.

Selecting an Account by Name

The account name search allows you to type in the account name, or part of the account name, to narrow down your search. Follow the steps below to select an account by name:

1. Press the **Account** screen key. The Select Account screen appears listing all of your accounts.
2. If necessary, press the left arrow key to toggle to the search by account name method.
3. 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.
4. Select the account you want to use:
 - Press **Enter** to select the account that most closely matches the characters you searched on; or
 - If a list of account names appear on the screen, press the screen key that corresponds with the account you want to use.The system returns to the Main screen, and the name of the account appears in the Account field.
5. If the account password is enabled, the Enter Account Password screen appears. If the account password is not enabled, go to step 4.
 - a. Type in the password.
 - b. Press **Enter**.

Selecting an Account by Speed Code

The speed code search allows you to type in the speed code, or part of the speed code, to narrow your search. Follow the steps below to select an account by speed code:

1. Press the **Account** screen key. The Select Account screen appears listing all of your accounts.
2. If necessary, press the left arrow key to toggle to the search by speed code method.
3. Type in the speed code, or the first few numbers of the speed code. The screen will show the account names that correspond with the speed code you typed.
4. Select the account you want to use:
 - Press **Enter** to select the account that most closely matches the characters you searched on; or
 - If a list of account names appear on the screen, press the screen key that corresponds with the account you want to use.The system returns to the Main screen, and the name of the account appears in the Account field.
4. If the account password is enabled, the Enter Account Password screen appears. If the account password is not enabled, go to step 4.
 - a. Type in the password.
 - b. Press **Enter**.

Deselecting an Account

1. Press the **Accounts** key.
2. Select **0. None** from the top of the list. "Account: None" now appears in the main screen.

Selecting an Account in Time Date Stamping Mode

Time Date Stamping mode allows you to print the current time and date, along with the word “Received” on incoming mail. When using Budget Manager or Business Manager accounting, you can select an account to charge back to, apply a surcharge and/or select Job ID to apply the time date stamp to.

The time and date will remain the same during a single transaction (whether you process a single envelope or 100 envelopes.) The system will update the date and time during the mail run.

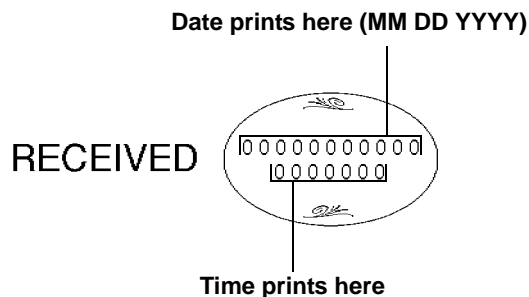
NOTE: The mailing system may operate at a slightly slower speed during this process.

When you view or print an accounting report, “Date Time Stamp” will appear in the Class column if the pieces were processed in Time Date Stamping mode.

1. Press the **Mode** key.
2. Select **Time and Date Stamping**.
3. Select **Acct** if you want to apply the time date stamp to a specific account. Once you have made your selection, the system returns to the Time Date Stamp Mode screen.
4. Select **Surcharge** if you want to apply a batch surcharge (a surcharge that applies only to this transaction). You can apply a surcharge per piece of mail, per transaction, and/or per transaction percentage.
 - a. Select the appropriate surcharge option and enter the surcharge amount.
 - b. Press **Enter**. The system returns to the Time Date Stamp Mode screen.
5. Select **Job ID** if you want to add a Job ID to the transaction.
 - If you know the Job ID, type in the Job ID number and press **Enter**.
 - If you want to see a list of recently used Job IDs, select **Most Recent Job ID**, then select the Job ID. (You can use the down arrow key to scroll through the list.)

Once you have made your selection, the system returns to the Time Date Stamp Mode screen.

6. Turn the piece of mail over, so the meter stamp is facing down. Then, place the envelope on the feed deck with the flap facing up.
7. Press the **Start** key. The Time/Date stamp prints on the envelope. A sample Time/Date stamp is shown below.



8. To exit Time and Date Stamping mode, press the **Mode** key and select a different mode.

Selecting an Account in Seal Only Mode

Seal Only Mode allows you to seal envelopes without applying postage. If you are running INVIEW™ Accounting, and you select Seal Only Mode, you will be prompted to select an account to track the pieces against.

When you view or print an accounting report, “Seal Only” will appear in the Class column if the pieces were processed in Seal Only mode.

Entering a Batch Surcharge

When you select the surcharge method from the Main screen, you are setting a batch surcharge, or a surcharge that will be applied only to the current transaction being processed.

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 *Setting Up Accounting, Selecting a Surcharge Mode* in this chapter.

To enter a batch surcharge:

1. At the Main screen, press the down arrow key.
2. Select **Surcharge**. The Batch Surcharge screen appears.
3. To clear the existing batch surcharge settings, select **Clear All Surcharges**. The per piece, surcharge per transaction, and per transaction percentage surcharges are set to 0.
4. To add a surcharge per piece:
 - a. Select **Per Piece**.
 - b. Type in the surcharge amount you wish to use for each individual piece of mail and press **Enter**.
5. To add a surcharge per transaction:
 - a. Select **Per Transaction**.
 - b. Type in the surcharge amount you wish to use for each transaction and press **Enter**.
6. To add a surcharge per transaction percentage:
 - a. Select **Per Transaction Percentage**.
 - b. Type in the percentage amount you wish to use and press **Enter**.
7. Press **Enter** to save your changes.

Selecting a Job ID

The 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 Main screen, press the down arrow key.
2. Select **Job ID**. The Job ID screen appears.
 - If you know the Job ID, type in the Job ID number and press **Enter**.
 - If you want to see a list of recently used Job IDs, select **Most Recent Job ID**, then select the Job ID. (You can use the down arrow key to scroll through the list.)
3. The system returns to the Main screen once you have made your Job ID selection.

6 • *Transaction Options*

This section tells you how to create manual transactions and view transactional data using INVIEW™ Accounting.

<i>Entering Manual Transaction</i>	6-2
<i>Viewing the Transaction Log</i>	6-3
<i>Transferring Transaction Data</i>	6-4
<i>Clearing the Transaction Log</i>	6-4
<i>Setting the Condition for the Log Full Warning</i>	6-5
<i>Defining the Action to Take When the Log is Full</i>	6-5
<i>Printing Transaction Receipts</i>	6-6

Entering Manual Transaction

Follow the steps below to create a manual transaction.

1. Press the **Menu** key.
2. Select **Manual Transaction**. The Manual Transaction screen appears. The options you choose to use will vary depending upon your manual transaction needs.
3. 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:
 - Manually scroll through the account list, then press the screen key that corresponds with the account name; or
 - Press the left arrow key to toggle the speed code search, type in the speed code, and press **Enter**; or
 - Press the left arrow key to toggle the account name search, type in the account name, and press **Enter**.
4. Select **Class** to set the postage class. Follow the prompts to select the appropriate carrier, class and special service options.
5. Select **Actual Postage** to set the actual postage amount for a piece of mail. Type in the actual postage amount for a piece of mail and press **Enter**.
6. Select **Charged Amount** to set the postage amount that you will be charging for each piece of mail. (This is the actual postage amount plus any surcharges you may want to add.) Type in the charged postage amount for a piece of mail and press **Enter**.
7. Select **Piece Count** to set the number of pieces of mail you want to process. Type in the number of pieces you want to mail and press **Enter**.
8. Select **Weight** to enter the weight of a piece of mail. Type in the weight and press **Enter**.
9. Select **Job ID** to assign a Job ID to the manual transaction.
 - a. Type in the Job ID number and press **Enter**; or
 - b. Select the **Most Recent Job ID** option, select the **Job ID**, then press **Enter**.
10. Once you have finished setting up your manual transaction select **Create Another** to enter an additional manual transaction, or press **Enter** and then **Home** to save your changes and return to the Main screen.

Viewing the Transaction Log

The transaction log contains a list of summary information for each of the transactions you have processed on the system. Each log contains the:

- Account;
- Transaction number and date;
- Actual postage;
- Charged amount;
- Piece count;
- Total weight;
- Transaction type;
- Carrier, class and fee (special services) used; and
- Operator ID.

Once you select to view the transaction log, you can view the transactions by date range and/or account. You also have the option of printing the transactions that meet the date and/or account criteria.

Follow the steps below to view the transaction log:

1. Press the **Menu** key.
2. Select **Set Up, Accounting Set Up**, then **Transaction Options**. The Transaction Options screen appears.
3. Select **View Transaction Log**.
4. The Select Account screen appears. You can:
 - Select **All Accounts**,
 - Select **For Each Account**. or
 - Select a specific account from the list.
5. The Enter a Date Range to Print screen appears.
 - a. Select **Start** to enter the date you want the transaction log to start. Type in the date in MMDDYYYY format. Press **Enter** when done.
 - b. Select **End** to enter the date you want the transaction log to end. Type in the date in MMDDYYYY format. Press **Enter** when done.
6. Press **Enter** to preview the transaction log.
7. Press **Enter** again to print the transaction log to an attached printer.

Transferring Transaction Data

You can use the transfer transaction data option to move data from one account to another.

Follow the steps below to select the transaction you want to transfer:

1. Press the **Menu** key.
2. Select **Set Up, Accounting Set Up**, then **Transaction Options**. The Transaction Options screen appears.
3. Select **Transfer a Transaction**. The Select Account screen appears.
4. Select the account to transfer the transaction from. The Transaction screen appears.
 - Use the right and left arrow keys to scroll through the available transactions.
 - Use the down arrow key to view additional information about a particular transaction.
5. Press **Enter** once you have found the transaction you want to transfer. The Select Account To Transfer To screen appears.
6. Select the account you want to transfer the transaction to. The Transaction screen appears with the updated account information in the Account field.
7. Press **Enter**.
8. Press the left arrow key to return to the Main screen.

Clearing the Transaction Log

The transaction log can hold up to 4,000 transactions, depending upon the INVIEW™ Accounting package you use. When the transaction log reaches full capacity, you can clear out the log to allow the inclusion of new transactions.

NOTE: Clearing the transaction log does not clear the account summary data. This is typically done on a monthly or quarterly basis.

Follow the steps below to clear the transaction log:

1. Press the **Menu** key.
2. Select **Set Up, Accounting Set Up**, then **Transaction Options**. The Transaction Options screen appears.
3. Select **Clear Transaction Log**. The Clear Transaction Log screen appears.
4. If you want to print a report select **Yes**. If you do not want to print a report select **No**. The Continue to Clear Log screen appears.
5. Select **Yes** to clear the log. The system returns to the Transaction Options screen.
6. Press the left arrow key to return to the Main screen.

Setting the Condition for the Log Full Warning

You can set the “log full warning” to notify you when the transaction log is filled to a certain percentage. The default setting is 90%, which means that when the transaction log is 90% 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 log full warning:

1. Press the **Menu** key.
2. Select **Set Up, Accounting Set Up**, then **Transaction Options**. The Transaction Options screen appears.
3. Select **Log Full Warning When:**.
4. Type in the percentage you want use (from 80 to 100) and press **Enter**. The system returns to the Transaction Option menu.
5. Press the left arrow key to return to the Main screen.

Defining the Action to Take When the Log is Full

The Action When Full 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, to continue processing mail with accounting disabled, 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 **Set Up, Accounting Set Up**, then **Transaction Options**. The Transaction Options screen appears.
3. Select **Action When Full:**. The Select Action screen appears.
4. Select the action you want the system to take. The system returns to the Transaction Options menu.

IMPORTANT: Selection of the “Process Mail without Accounting” option can result in the loss of accounting data.

5. Press the left arrow key to return to the Main screen.

Printing Transaction Receipts

The Receipt Printing option allows you to select the action you want the system to take at the end of each transaction. You can choose to print a short form receipt, to print a long form receipt, or to turn receipt printing off.

You must have an external (attached) printer or a receipt printer connected to your system in order to print transaction receipts.

Follow the steps below to print transaction receipts:

1. Press the **Menu** key.
2. Select **Set Up, Accounting Set Up**, then **Transaction Options**. The Transaction Options screen appears.
3. Select **Receipt Printing**. The Receipt Printing screen appears.
4. Select the appropriate option:
 - **Short Form** - The receipt includes the date, time, station, serial number, operator, account, Job ID 1, carrier, class, total pieces, surcharge and charge.
 - **Long Form** - This receipt includes the date, time, station, serial number, operator, account, Job ID 1, carrier, class, total pieces, surcharge, charge, start/end ascending register, start/end descending register, start/end piece count.
 - **Off**.

```

-----
                                Transaction Receipt
Date: 2008/07/23                Time: 16:31
Station: 0                      Serial No. : 0123450

Operator: Joe

Account: Bridgeport
        Job ID : Black

                                Batch Information

Carrier : 50-USPS Domestic

Class : 124-Express Mail PO-Addresses

Total                               Surcharge :    0.240
        Pieces :    24 Charge : 2.640

-----
    
```

Short Form Receipt

```

-----
                                Transaction Receipt
Date: 2008/07/23                Time: 16:31
Station: 0                      Serial No. : 0123450

Operator: Joe

Account: Bridgeport
        Job ID : Black

                                Batch Information

Carrier : 50-USPS Domestic

Class : 124-Express Mail PO-Addresses

Total                               Surcharge :    0.240
        Pieces :    24 Charge : 2.640

                                Meter Information

Start Ascending Register :      21.010
End Ascending Register :      23.410

Start Descending Register :    9979.000
End Descending Register :    9976.600

Start Piece Count :           97
End Piece Count :            121

-----
    
```

Long Form Receipt

7 • INVIEW™ Accounting Reports

This section tells you how to view, print and create reports unique to the INVIEW™ Accounting system.

<i>Introduction</i>	7-2
<i>Report Printing Queue</i>	7-2
<i>Report Macros</i>	7-3
<i>Custom Reports</i>	7-5
<i>Transaction Log Report</i>	7-7
<i>Weight Break Account/Class Report</i>	7-8
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<i>Weight Break Job ID/Class Report</i>	7-10
<i>Account Summary Report</i>	7-11
<i>Quick Profile Report</i>	7-11
<i>Accounting Setup Report</i>	7-12
<i>Account Speed Code List Report</i>	7-13
<i>Operator List Report</i>	7-13

Introduction

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

Refer to the *Reporting* chapter in your mailing system operating guide for additional reporting information.

Printing Reports

You can print accounting reports using an external (attached) printer if one is connected to your system.

NOTE: You must enable report printing for an operator in order for that operator to print a report. *Setting Up Operators, Viewing and Editing Operators* in this section for more information.

Follow the steps below to print a report:

1. Press the **Reports** key.
2. Select the report you want to print. Follow the prompts, if any, that may appear.
3. Press **Enter** to print the report to the attached printer.
4. Press the left arrow key to return to the main screen.

Report Printing Queue

The Report Print Queue will function with most standard reports, except for the Confirmation Services reports. (A warning message will appear if you attempt to print a Confirmation Services report when there are reports in the queue.)

If a series of reports are scheduled to print, the Reports Queue option will appear on the main report screen.

1. Press the **Reports** key.
2. If necessary, press the down arrow key and select **Reports Queue**. Once selected, this option will list information about the report that is currently printing, as well as a list of the reports that are remaining in the queue.

NOTE: You can cancel reports out of the queue. If the printer runs out of paper, the "Check external printer" message will appear on the main screen.

Report Macros

Report macros allow you to print up to five reports at once. For example, you can print up to five reports related to the same account, or the same report for up to five different accounts.

Creating a Report Macro

Follow the steps below to create a report macro.

1. Press the **Reports** key
2. Select **Accounting Reports** and then **Report Macros**.
3. Press the right arrow key to enter the Set Up menu. The Set Up Report Macro screen appears.
4. Select **Create Macro**.
5. Type in the macro name and press **Enter**.
6. Select a report to add to the macro. Use the down arrow key to scroll through the list of reports, if necessary.
7. Select an account to include in the report and press **Enter**. Depending upon your selection, you may be prompted to enter a date range.
Select:
 - Select **Current Day** to print the report for the current day.
 - Select **Current Week** to print the report for the current week.
 - Select **Current Month** to print the report for the current month.
 - Select **N days back from today** to print the report for a set number of days. Enter the number of days back, up to 364, that you want to print the report for.Press **Enter** when done.
8. Press **Enter** to save the report and account information.
9. Repeat steps 6 to 8 to add additional reports to the macro. You can add reports to the macro until all "Available" options are used.
10. Press **Enter** to save the macro.

Using a Report Macro to Print Reports

You can print report macros using an external (attached) printer if one is connected to your system.

Follow the steps below to print a report macro:

1. Press the **Reports** key
2. Select **Accounting Reports** and then **Report Macros**.
3. Select the report macro you want to print.
4. Press **Enter** to print the report macro.
5. Press **Enter** to return to the main screen.

**Viewing and
Editing Report
Macros**

1. Press the **Reports** key
2. Select **Accounting Reports** and then **Report Macros**.
3. Press the right arrow key to enter the Set Up menu. The Set Up Report Macro screen appears.
4. Select **View/Edit Macro**.
5. Select the macro you want to view or edit.
6. The Edit Macro name screen appears.
 - If you want to rename the report macro, use the left arrow key to delete letters in the macro name, or press the **Clear** key to clear the name. Type in the new macro name and press **Enter**.
 - If you want to keep the existing macro name, press **Enter**.
7. To replace a report in the macro, press the screen key that corresponds with the report you want to replace. Follow the prompts and select the appropriate report options.
If there are "Available" options, you can add reports to them as well.
8. Press **Enter** to save your changes.

**Deleting a Report
Macro**

Follow the step below to delete a report macro from the system.

1. Press the **Reports** key
2. Select **Accounting Reports** and then **Report Macros**.
3. Press the right arrow key to enter the Set Up menu. The Set Up Report Macro screen appears.
4. Select **Delete Macro**.
5. Select the macro you want to delete.
6. The Delete Macro screen appears. Select **Yes** to delete the macro.

Custom Reports

You can design your own report formats using the Custom Reports Report Generation 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 detailed report outputs specific information about each transaction processed by the system. If you select the detailed report format you will be able to include any, or all, of the following data in your report:

- Transaction ID;
- Date of Transaction;
- Time;
- Account;
- Carrier;
- Class/Fee;
- Job ID 1;
- Operator;
- Total Weight;
- Pieces;
- Postage;
- Surcharge;
- Total Charge; and
- Transaction Type.

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;
- Carrier
- Class/Fee
- Pieces;
- Postage;
- Surcharge;
- Total Charge;
- Year to Date Pieces;
- Year to Date Postage;
- Year to Date Surcharge; and
- Year to Date Total Charge.

Custom Report Tips:

- “Available” options on the Select Custom Report screen indicate open spaces where you can create a new custom report.
 - When selecting data to include in the report:
 - “Selected” appears 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 “Spaces Used” counter on the bottom of the screen indicates how much space you have left in the report. You will receive a “Not Enough Space Left” 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 **Reports** key.
2. Select **Accounting Reports**, then **Custom Reports**.
3. Select the first Available option on the list.
4. Select **Create Report**.
5. Type in the report name and press **Enter**.
6. Select the appropriate report format.
7. Press the screen keys that correspond with the data you want to include in your report.
8. Press **Enter** when you are done selecting data.
9. If you selected any data that can be grouped, the Select Data to Group By screen appears. Select the appropriate option(s) and press Enter.
10. If you selected any data that can be subtotaled, the Select Data to subtotal screen appears.
 - a. Press the screen keys that correspond with the data you want to subtotal in your report.
 - b. Press **Enter** once you are done selecting data.
11. If you selected accounts to be grouped or subtotaled, the Accounts to Include screen appears.
 - Select **Prompt for an Individual Account...** to require an operator to select an account before printing the report.
 - Select **Include All Accounts** to include all accounts when printing the report.
12. Press **Enter** to save the custom report.

Viewing and Editing a Custom Report

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

1. Press the **Reports** key.
2. Select **Accounting Reports**,
3. Press the right arrow key. The Set Up Custom Reports screen appears.
4. Select **View/Edit Report**.
5. Select the custom report you want to view or edit. The Edit Report Name screen appears.
6. Use the left arrow key to backspace, or press the **Clear** key to delete the existing name. Type in the new report name and press **Enter**.
7. The Select Data to Include screen appears. Select or deselect the appropriate options.
8. If you selected any data that can be subtotaled, the Select Data to subtotal screen appears.
 - a. Press the screen keys that correspond with the data you want to subtotal in your report.
 - b. Press **Enter** once you are done selecting data.
9. If you selected accounts to be grouped or subtotaled, the Accounts to Include screen appears.
 - Select **Prompt for an Individual Account...** to require an operator to select an account before printing the report.
 - Select **Include All Accounts** to include all accounts when printing the report.
10. Press **Enter** to save the custom report.

Deleting a Custom Report

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

1. Press the **Reports** key.
2. Select **Accounting Reports**,
3. Press the right arrow key. The Set Up Custom Reports screen appears.
4. Select **Delete Report**.
5. Select the custom report you want to delete.
6. Select **Yes**.
7. Press the left arrow key to return to the Main screen.

Transaction Log Report

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

						Page:	1
						Date:	JAN 5 2008
						Time:	3:02P
						Station:	2A
Transactions for JAN 1 2008 to JAN 5 2008							
Trans							Trans
ID	Account	Pieces	Postage	Surcharge	Total		Type
1	Shelton	9	5.400	0.00	5.400		I
2	Stamford	24	13.070	0.00	13.070		I
3	Newtown	3	11.550	0.00	11.550		I
=====							
Grand Total:		43	34.450	0.00	34.450		
End of Report							

**Weight Break
Account/Class
Report**

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

Page: 1
Date: JAN 5 2008
Time: 3:02P
Station: 2A

Weight Break Account/Class for Jan 4 2008 to Jan 4 2008

<u>Account</u>	<u>Carrier</u>	<u>Class</u>	<u>Weight</u>		<u>Pieces</u>	<u>Postage</u>
			<u>Break</u>	<u>Unit</u>		
NE Cities - Hartford	USPS Dom	1st Cls Regular	1.0	oz	3	1.110
			2.0	oz	3	1.800
			3.0	oz	3	2.490
		Subtotal:			9	5.400
		Subtotal:			9	5.400
Subtotal:					9	5.400
NE Cities - New Haven	USPS Dom	1st Cls Presort	1.0	oz	4	1.408
			2.0	oz	4	2.308
			3.0	oz	4	3.044
		Subtotal:			12	6.760
		Subtotal:			12	6.760
Subtotal:					12	6.760
=====						
Grand Total:					25	12.160
End of Report						

**Weight Break
Carrier/Class
Report**

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

						Page: 1
						Date: JAN 5 2008
						Time: 3:02P
						Station 2A
						:
Weight Break Carrier/Class for Jan 4 2008 to Jan 4 2008						
	<u>Carrier</u>	<u>Class</u>	<u>Weight Break</u>	<u>Unit</u>	<u>Pieces</u>	<u>Postage</u>
		No Class	0.0	oz	61	104.170
		Subtotal:			61	104.170
Subtotal:					61	104.170
		Seal Only	0.0	oz	25	0.000
		Subtotal:			25	0.000
Subtotal:					25	0.000
USPS Dom		1st Cls Presort	1.0	oz	4	1.408
			2.0	oz	4	2.308
			3.0	oz	4	3.044
		Subtotal:			12	6.760
		1st Cls Regular	0.0	oz	6	3.330
			1.0	oz	30	38.520
			2.0	oz	30	44.700
			3.0	oz	30	51.600
		Subtotal:			96	138.150
Subtotal:					108	144.910
=====						
Grand Total:					194	249.080
End of Report						

**Weight Break
Job ID/Class
Report**

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

						Page: 1
						Date: JAN 5 2008
						Time: 3:02P
						Station: 2A
Weight Break Job ID-1/Class for Jan 4 2008 to Jan 4 2008						
<u>Job ID</u>	<u>Carrier</u>	<u>Class</u>	<u>Weight Break</u>	<u>Units</u>	<u>Pieces</u>	<u>Postage</u>
Black		No Class	0.0 oz		25	96.250
		Subtotal:			25	96.250
	Subtotal:				25	96.250
		Seal Only	0.0 oz		25	0.000
		Subtotal:			25	0.000
	Subtotal:				25	0.000
	USPS Dom	1st Cls Regular	1.0 oz		1	0.420
			2.0 oz		1	0.600
			3.0 oz		1	0.830
		Subtotal:			3	1.800
	Subtotal:				3	1.800
Subtotal:					53	98.050
Green	USPS Dom	1st Cls Regular	0.0 oz		6	3.330
			1.0 oz		8	18.170
			2.0 oz		8	19.650
			3.0 oz		8	21.490
		Subtotal:			30	62.640
	Subtotal:				30	62.640
Subtotal:					30	62.640
=====						
Grand Total:					83	160.690
End of Report						

Account Summary Report

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.

If this report is for a single account it can be viewed on the screen.

Page: 1				
Date: JAN 5 2008				
Time: 3:02P				
Station: 2A				
Account Summary - JAN 1 2008 to JAN 30 2008				
<u>Account</u>	<u>Pieces</u>	<u>Postage</u>	<u>Surcharge</u>	<u>Total</u>
PB				
Stamford				
WHQ	28	31.030	0.00	31.030
Subtotal:	28	31.030	0.00	31.030
=====				
Grand Total:	28	31.030	0.00	31.030
End of Report				

Quick Profile Report

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

You can view the Quick Profile reports on the IntelliLink® Control Center before printing them.

Page: 1					
Date: JAN 5 2008					
Time: 3:02P					
Station: 2A					
Quick View for - JAN 1 2008 to JAN 30 2008					
<u>Serial No</u>	<u>Pieces</u>	<u>Postage</u>	<u>Surcharge</u>	<u>Discrepancy</u>	<u>Total</u>
123456	677	\$393.836	\$28.65	0.000	\$422.486
=====					
Grand Total:	677	393.836	28.65	0.000	422.486
End of Report					

Accounting Setup Report

The Accounting Set Up report lists the INVIEW™ Accounting options and settings.

Page: 1
 Date: JAN 5 2008
 Time: 3:02P
 Station: 2A

Accounting Setup

<u>Configuration Item</u>	<u>Value</u>
Budget Manager PCN	####
Number of Accounts	13
Accounting Periods	12
Account Passwords	Enable
Default Spend Limit Basis	90%
Spend Limit	Enable
Operators	Enable
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	Pitney Bowes
Owner Address	35 Waterview Drive, Shelton CT 06484
End of Report	

Account Speed Code List Report

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

			Page: 1
			Date: JAN 5 2008
			Time: 3:02P
			Station: 2A
Account Speed Code List			
<u>Speed Code</u>	<u>Account</u>	<u>Description</u>	
1	Shelton		
2	Stamford		
3	Connecticut - Hartford		
4	Connecticut - New Haven		
5	Connecticut - Bridgeport		
6	PB-Shelton-27WV		
7	PB-Shelton-35WV		
8	PB-Stamford-Main Plant		
9	PB Newtown-Distribution		
10	PB Newtown-RMA		

Operator List Report

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).

				Page: 1
				Date: JAN 5 2008
				Time: 3:02P
				Station: 2A
Operator List				
<u>Operator Name</u>	<u>Op ID</u>	<u>Status</u>	<u>Reports Enabled</u>	<u>Privilege</u>
Joe	5	Active	Yes	
Lynn	4	Active	Yes	
Mark	1	Active	Yes	Supervisor
Mike	2	Active	Yes	Supervisor
Rushi	3	Active	Yes	
End of Report				

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