



Shipping & Mailing
Mailing Equipment & Software

PB First™

Software Application

Operator Guide

US English Edition
SV60807 Rev. K
October 31, 2024

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The data used in the screen examples in this manual are fictitious unless otherwise noted, and are designed solely to document proper use of the software.

PB FIRST™ Software User Guide
SV60807 Rev. K
October 2024

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Who Should Read This User Guide

This Software User Guide should be read by PB FIRST™ users who want to set up and run customized mail jobs on one or more of the following Pitney Bowes systems:

- DocuMatch® Integrated Mail Processor DC115
- DocuMatch® Integrated Mail Processor DC225
- OfficeRight™ Inserting System DI350
- An AddressRight™ envelope printer
- 3 Series™/4 Series™/5 Series™ Tabletop Inserter
- FastPac™ Inserting System DI400
- FastPac™ Inserting System DI500 and DI600
- FastPac™ Inserting System DI800
- FastPac™ Inserting System DI900 and DI950

We recommend that users in the U.S. be familiar with Pitney Bowes SmartMailer™ software as well as with the function of the tabletop inserters or DocuMatch.

This revision to the Software User Guide (Rev J) is concurrent with the release of PB FIRST software version 13.02, January 2006, in the U.S.

What Is PB FIRST?

PB FIRST (Pitney Bowes File Importing, Reformatting, Sorting Tool) is a software program that enables you to import text files, data files, PDF files, or print image files of address records, in PC-based and non-PC based data formats, and print them out as preprinted forms and customized reports.

What Does PB FIRST Do?

☐ **Postal Codes and Presorts (U.S. Only)**

Postal codes your mail to ensure each address is deliverable and presorts your mail so you can take advantage of postal discounts (SmartMailer software required). Learn more about this in Chapters 2 and 3.

What Does PB FIRST Do?

- ☐ **Creates and Prints OMR Marks**

Simplifies the difficult task of creating and printing Pitney Bowes OMR (Optical Mark Recognition) marks for 3 Series/4 Series/5 Series, OfficeRight DI350, FastPac DI400/DI800, FastPac DI500/DI600, and DI900/DI950 Series Inserters applications to ensure mailpiece integrity. (Chapter 4)
- ☐ **Browses Addresses**

Allows you to browse through address records, search for a specific record or range of records, and print selected records or a range of records. (Chapter 3)
- ☐ **Prints Selected Pieces**

Prints a specific address record or range of records. (Chapter 3)
- ☐ **Groups Documents**

Groups documents destined for the same address into a single mailpiece, allowing for savings on postage and materials. (Chapter 4)
- ☐ **Combines Multiple Data Files**

Combines multiple data files in the same format into one mail job.
- ☐ **Separates Overcount Items**

Separates mailpieces that have too many pages to run through a DocuMatch DC115, 5 Series, or FastPac DI800 machine so they can be processed manually. (Chapter 2)
- ☐ **Imports Data Files**

Imports data files such as Excel, comma delimited, or any file format that Microsoft Access can import. (Chapter 4)
- ☐ **Runs Jobs in Batch Mode**

Runs a mail job from start to finish with no user intervention. (Chapter 4)
- ☐ **Splits Print Jobs Among Multiple Printers (Load Balanced Printing)**

Supports print jobs split among multiple printers. (Chapter 4)

What Does PB FIRST Do?

- ☐ **Prints Duplex**

Prints either simplex or duplex (front and back of page) documents for DocuMatch DC115, 5 Series, FastPac DI800, and FastPac DI500/DI600 mail jobs. (Chapter 4)
- ☐ **Prints with Tray Switching**

Switches paper trays in between different pages in a document (for example, printing a first page on company letterhead and the remaining pages on plain paper). (Chapter 4)
- ☐ **Prints Checks**

Prints checks on a laser printer, maintains logs of check runs and user activity, manages user privileges, encrypts signatures, and creates an output file for Positive Pay services offered by some financial institutions. (Chapter 5)
- ☐ **Prints Envelopes**

Prints an envelope-only job, using layouts designed in Pitney Bowes Envelope Designer Plus™ software (not including the AddressRight™ (W990) printer). (Chapter 4)
- ☐ **Creates and Modifies Access Reports**

Creates and modifies reports in Microsoft® Access 2000, Access XP, and Access 2003. Consult your Pitney Bowes Systems Engineer (PBSE).
- ☐ **Creates Preprinted Forms**

Eliminates the expense of preprinted forms by creating them. (Consult your PBSE)
- ☐ **Simplifies DocuMatch Processing**

Reduces the steps required during the DocuMatch DC115 mail creation process.
- ☐ **Interfaces with SmartMailer**

Creates SmartMailer tray breaks, CASS reports, and tray labels within the program (requires SmartMailer). (Chapter 3)
- ☐ **Interfaces with VeriMove™ Net (replaces ForwardTrak™ Net)**

Updates your mailing lists from the USPS® National

What Does PB FIRST Do?

Change of Address database. SmartMailer customers who have signed up for VeriMove can access this Pitney Bowes service directly from the PB FIRST main menu. (Chapter 4)

- ☐ **Multiple Accounts for Check Printing**

Allows you to manage multiple accounts for your check printing jobs. (Chapter 5)

- ☐ **Archives Printed Mailpiece Documents**

Allows you to produce an archive of mailpiece documents that have been printed, in the same format as they were printed, in either paper or searchable electronic (PDF) format. (Chapter 4).

- ☐ **Overcount Group Splitting**

Allows you to split Overcount items for the same recipient into multiple envelopes in order to minimize the number of envelopes that must be processed manually. The split groups are kept together at the end of the mail job. (Chapter 4)

- ☐ **Sorting Error Coded Pieces to the End of the List**

Enables PB FIRST users who merely want to postal code without presorting to separate pieces that fail postal coding and send them to the end of the mail job. This option is particularly useful for processing mail that needs to be separated from rest of the mail job that will not be presorted, such as interoffice mail or international mail. (Chapter 4)

- ☐ **Direct Access to SmartMailer Presort Setup dialogs**

The Presort Setup button on the Advanced User Setup dialog box (Postal Code option set) enables you to access SmartMailer Presort Setup dialogs directly from PB FIRST. (Chapter 2)

- ☐ **PDF-to-Text Importing**

Supports importing from Portable Document Format (PDF) files. This extends the number of applications that can be integrated with PB FIRST. (This optional feature is available only for PB FIRST installations configured for PDF-to-text conversion, per your sales agreement.) (Chapter 4)

What Does PB FIRST Do?

- ☐ **Print from Multiple Printers (Load Balancing) from the Browse Addresses Dialog Box**

Allows you to perform selective printing or reprinting from the Browse Addresses dialog box. (Chapter 3)
- ☐ **Duplex Printing with Grouping**

You can process a PB FIRST job that includes the duplex printing feature and grouping feature simultaneously. (Chapter 4)
- ☐ **Reporting of VeriMove™ Changes**

You can generate a report of all changes that VeriMove has made to your address list. (Chapter 4)
- ☐ **Grouping for Data Files**

You can take advantage of the grouping feature when importing data files, which may save postage on extra mailpieces. (Chapter 4)
- ☐ **SmartMailer DPV Support**

Allows you to take advantage of SmartMailer's Delivery Point Validation (DPV) feature. Refer to the Help system in SmartMailer for more information.
- ☐ **Document Page Count Warning**

Optional warning that notifies you (during importing) when a document's page count exceeds 20 pages.
- ☐ **Address Change Tracking Preliminary Report**

In addition to being able to generate a report of destination addresses changed through SmartMailer postal coding, you can also instruct the system to perform a preliminary, first-pass of address change tracking so that the system does NOT postal code or change addresses, but generates a report of the addresses it would have changed. (Chapter 4)
- ☐ **Postal Data Expiration Warning**

A warning message appears in the main menu (between the Help and Exit buttons) advising you that your Postal Data is soon to expire. As with SmartMailer, this gives you an opportunity to install the latest CD prior to expiration. (Chapter 2)

What Does PB FIRST Do?

- ☐ **Z-Fold Duplex for 3 Series/DI350/DI400 Supported**
Supports Z-fold duplex for 3 Series/DI350/DI400.
- ☐ **Tray Switch Support for New HP Printers**
Supports tray switching on Hewlett-Packard PCL6 printers.
- ☐ **Reports for DI500**
Reports are included for DI500 duplex, DI500 check, and DI500 simplex.
- ☐ **Print Presort Reports Which Are Not CASS Related**
Allows you to view and print the file "listname.pdf.fdf" (generated by SmartMailer) from the Presort Reports dialog box that is displayed during presorting. This provides you with a summary of cost savings. (Chapter 3)
- ☐ **Review Presort Results After Presorting**
You can review presort results after the presort is completed. This option may be enabled or disabled at your discretion in Advanced User Setup. (Chapter 3)
- ☐ **Recall Last Setting of Load Balanced Printing Dialog Box**
The software remembers the last setting used in the Load Balanced Printing* dialog box, which is used for job splitting among multiple printers. This eliminates repetitive printer selection operations. This feature also allows batch mode to work with the load balancing option on. If the input file has been changed and it does not have the same number of documents, the system remembers the number of printers used the last time and divides the number of documents equally among the printers from the last run. The system also validates the existence of printers used last. If a printer has been removed, the system displays an error message and disregards the last settings.
- ☐ **Warning Message Reminds You to Load MICR Toner Before Printing Checks**
Before any printing has taken place for a check printing job, PB FIRST reminds you to change your printer's toner to MICR toner. This reduces the chance that your printed checks will be rejected by your bank's

What Does PB FIRST Do?

check processing equipment, which may expose you to large fees. This warning message may be enabled or disabled at your discretion. (Chapter 5)

- ☐ **Defined Import Specifications for Data File Import of Delimited Text**

For data file import of delimited text, allows you to select defined Access specifications for import from a drop-down list in the Advanced User Setup: Data File Type dialog box. This simplifies setup for delimited text file import. (Chapter 4).

- ☐ **Supports Creation and Printing of FastPac DI900/DI950 OMR Marks and Barcodes**

Supports creation of OMR marks (optical mark recognition), creation of barcodes, and printing of reports for FastPac DI900/DI950 inserters for open loop in offline mode and for open loop/closed loop in online mode. Your Pitney Bowes field system engineer can create jobs that allow you to access the full power of PB FIRST to control all the features of your inserting system. New reports are included for DI900/950 OMR, DI900/950 OMR Check, DI900/950 OMR Simplex, DI900/950 OMR Simplex check, DI900/950 OMR Duplex, DI900/950 Barcode, DI900/950 Barcode Check, DI900 Barcode Simplex, DI900 Barcode Simplex Check, DI900/950 Barcode Duplex. (Chapter 4)

- ☐ **Supports SmartMailer™ Upgrade of Its Change of Address Processing Program from ForwardTrak™ Net to VeriMove™ Net**

Supports the upgrade of SmartMailer™ 7's change of address processing program from ForwardTrak™ Net to VeriMove™ Net. This upgrade interfaces with the USPS® National Change of Address Linkage System database (NCOALink™) and provides more options for change of address searches and for the handling of your processed lists.

What's New in Version 13.02

- ☐ **VeriMove Net™ Button on Main Screen Changed to Move Update**

All functionality remains the same with the Move Update button.
- ☐ **Provide Number Of Mailpieces and Documents at End of an Import**

During the import function, you now have the option of having the system inform you of how many documents have been imported and how many mailpieces have been generated by those documents.
- ☐ **Refined Error Handling During the Import Process**

Clearer error messages (if they occur) have been provided during importing.
- ☐ **Access to SmartMailer Presort Package Report**

PB FIRST allows you to view and print the Presort Package report ("list_name.pkg.pdf") generated by SmartMailer. This option has been added to the Presort Reports dialog box that is displayed during presorting.
- ☐ **More Options for Error Coded Pieces**

You are now able to print the error coded pieces after postal processing in a separate print job or to leave them in the normal sort order.
- ☐ **Address Report Now Lists Error Code Descriptions**

The address report has changed to include an error description as well as the error code in the report.
- ☐ **Support for Canada, France, Germany, the Netherlands, and the UK**

PB FIRST DF is now available for sale in Canada, France, Germany, the Netherlands, and Germany. Separate selections for locale (country) and language can be chosen by clicking on the PB FIRST Logo on the main screen.
- ☐ **Multiple Launches of PB FIRST at One Time Not Allowed**

The system will not allow two launches of a PB FIRST project or MS Access at the same time. This prevents corruption of PB FIRST when multiple instances are executed simultaneously.

What's New in Version 13.02

☐ **InstallShield Used for Software Installation with Added Features**

PB FIRST DF install (and uninstall) now uses the InstallShield application instead of the Wise script. In addition, the new install will detect earlier versions of DF and will inform you that you are not allowed to install the current version of DF until you uninstall the earlier releases of DF. Project Creation wizard screens have been added for easier project creation.

☐ **New Remove (Uninstall) Utility**

A new Remove (uninstall) utility for PB FIRST DF is now accessible at Control Panel>Add/Remove Programs>PB FIRST DF.

☐ **New Project Creation Utility**

A new Add Projects utility for PB FIRST DF is now accessible at Control Panel>Add/Remove Programs>PB FIRST DF.

☐ **New Repair Utility**

A new Repair utility for PB FIRST DF is now accessible at Control Panel>Add/Remove Programs>PB FIRST DF.

How Does It Work?

PB FIRST works on data that you would ordinarily use and send to a printer, such as invoices, statements, checks, notifications, or other transactional mailings. Instead of printing the information directly, your application sends the print job (consisting of a mail run of multiple documents), to an ASCII text file or data file. PB FIRST scans the input file, then imports the file's data into Microsoft® Access database tables. (The file to be imported must not contain any graphics. You can place graphics only after the file has been imported.)

PB FIRST maintains information about the imported data, keeping track of which data belongs to which document, thus ensuring the correct documents are inserted into each envelope so that mail recipients receive the correct information.

PB FIRST separates the imported and formatted data into two categories: Normal and Overcount. Normal items are those you can process automatically through the destination machine. Overcount items are those which contain too many pages per envelope and as such must be processed manually.

PB FIRST prints the recombined data as an Access report on a DocuMatch DC115 or DC225, envelope printer, or other high speed printer.

System Requirements



NOTE: An inserting system or DocuMatch is not required, but recommended.

PB FIRST software requires:

- ☐ Microsoft® Windows 2000 or XP operating system;
- ☐ Microsoft Access 2000, Access XP, or Access 2003;
- ☐ Pitney Bowes SmartMailer software (if you are postal coding and presorting in the U.S.);
- ☐ Hard disk space (varies depending on size of import file);
- ☐ For Optical Mark Recognition jobs, we recommend you use a high speed printer.

- ☐ One of the following (not required, but recommended):
 - ☐ 3 Series/4 Series/5 Series Tabletop Inserter
 - ☐ OfficeRight DI350/FastPac DI400 Inserter
 - ☐ FastPac DI500/DI600 Inserting System
 - ☐ FastPac DI800 Inserting System
 - ☐ FastPac DI900/DI950 Inserting System
 - ☐ DocuMatch Integrated Mail Processor DC115 or DocuMatch DC225
 - ☐ H5LP stand-alone high speed printer
- ☐ As of version 11.03, PB FIRST supports Office 2003
- ☐ As of version 13.01, if you choose to run a DI900/DI950 closed loop job, you need to install the SureTrac™ Server and Client software on your PC as well as PB FIRST.

Getting Help

During installation, your Pitney Bowes Systems Engineer downloaded a .pdf copy of this PB FIRST Software User Guide onto your computer (Pitney Bowes publication SV60807). For more information related to PB FIRST, please refer to the documentation listed below:

PB FIRST Help

- ☐ Access the Help system by pressing the Help button on the PB FIRST main menu.

SmartMailer Software

- ☐ Refer to SmartMailer Online Help

Internet Technical Support

- ☐ www.pitneybowes.com/us

Getting Help

Software Version Information

When providing technical assistance, Technical Support may ask you for version information about your PB FIRST software. You can quickly access this information by double-clicking on the PB FIRST heading in the top center of the main menu. The About PB FIRST message box appears (Figure 1-1) with the version information for your software release.

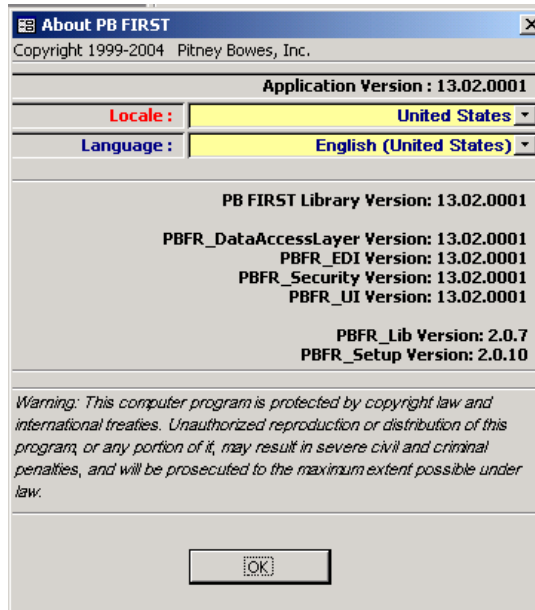


Figure 1-1
Obtaining PB FIRST software version information

International Support

Besides the US, PB FIRST is now available for sale in Canada, France, Germany, the Netherlands, and Germany. To make this possible, and give the maximum flexibility for our users, separate selections for locale (country) and language can be chosen (see examples on next page).

Locale - This is the country where PB FIRST is being run. Certain screens and functions (such as presort) do not apply outside of the US, so selecting a specific locale changes some screen options shown to the user. The locales (countries) available are:

- Canada
- France
- Germany
- Netherlands
- United States

Language - This is the language that displays on the translated screens. The languages available are:

- German
- English (Canada)
- English (UK)
- English (US)
- Spanish (US)
- French (France)
- French (Canada)
- Dutch (Netherlands)

Items that Remain the Same Between Locales (Countries)

- Same physical CD is used for US and international release.
- Same application (i.e., the software release) is used for US and other locales.
- The same Setup User interface (although translated) is used for both US and non-US locales.
- The system always installs the software for US locale and US English as the default.
- You can change the Locale and Language by clicking on PB FIRST on the startup screen.

International Support

Screens that Change Between Locales (Countries)

- Startup screen (see page 1-17)
- Browse address form (see page 1-17)

Virtually All Screens Are Translated

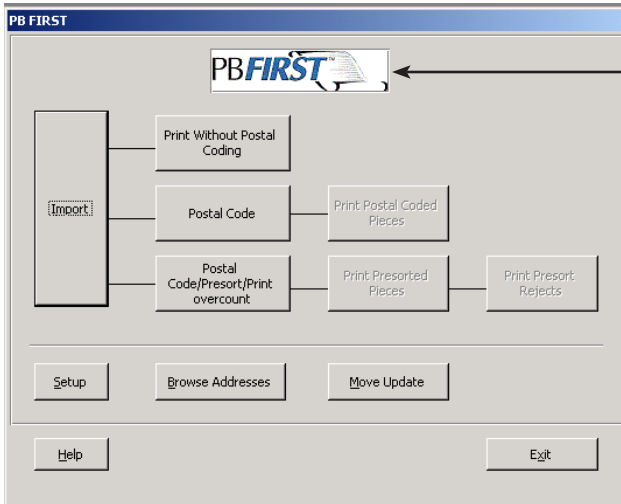
Almost all screens, fields, and forms are translated when you change language.

Supporting Materials in English Only

The Read Me, Install, Help, Operator Guide, and Service Manual are in English only.

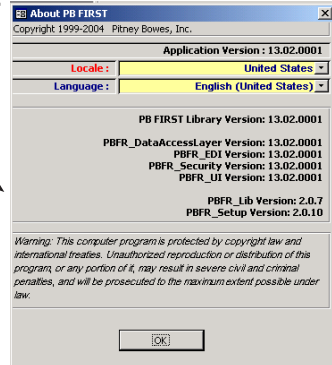
1 Introduction

International Support

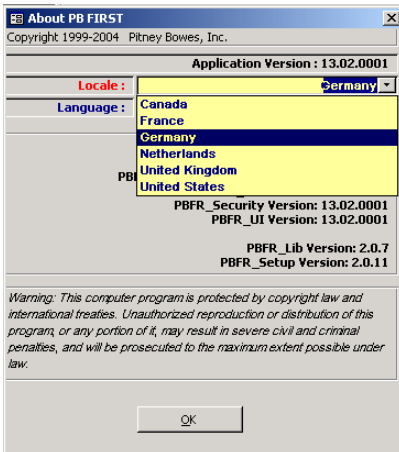


Initial Startup Screen After Software Install
(USA English Screen is Default)

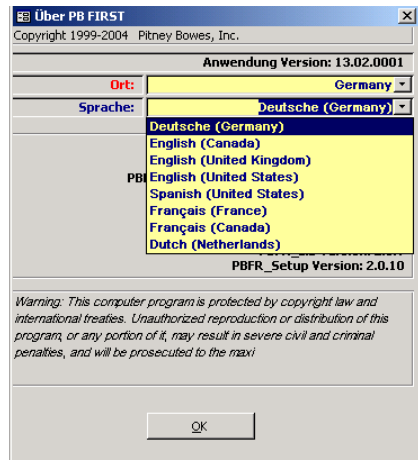
Click on
PB FIRST
to access
About PB
FIRST
dialog
box



About PB FIRST Screen
(Used to Change Locale
and Language)



Selecting Locale (Country)

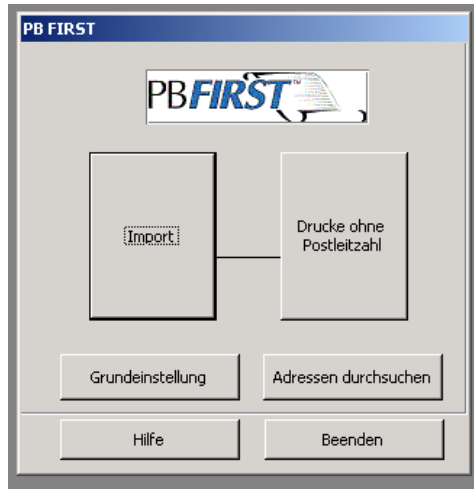


Selecting Language

Continues on next page →

International Support

Continued
from previous
page



NOTE: Subsequent launches of PB FIRST will retain the last local and language selected, so you do not need to re-choose them each time.

Startup Screen in Chosen Locale and Language (non-US)
(Note the different screen options)

Non-US Browse Screen

US Browse Screen

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2 The Basics

Installation and Initial Setup

Your Pitney Bowes Systems Engineer (PBSE) installs and sets up your PB FIRST™ software for you.

For each type of PB FIRST application you require, your PBSE sets up a unique PB FIRST job and creates a PB FIRST desktop icon (shortcut), each with its own job name (for example, pbfinv1, pbfinv2, stmtmo, stmtyr, checks1, checks2, and so on).

User Privileges and Passwords

There are two basic levels of user privileges with which you can access PB FIRST:

- **User**
- **Advanced User**

A User is authorized to run a PB FIRST job. An Advanced User is authorized to setup, modify, and run a job.

During installation and setup, your PBSE determines your requirements for security access levels and sets up your user names and passwords. Thereafter, Users and Advanced Users can change their own passwords (see next section).

To learn about user privileges and security for check printing jobs, refer to Chapter 5.

Launching PB FIRST

Logging On

To launch PB FIRST:

1. Double-click the **PB FIRST** desktop icon for the job you wish to run (Figure 2-1).
2. In the Logon dialog box (Figure 2-2), type your User or Advanced User name and password as set up for you by your Pitney Bowes Systems Engineer, then click **OK**.



Figure 2-1

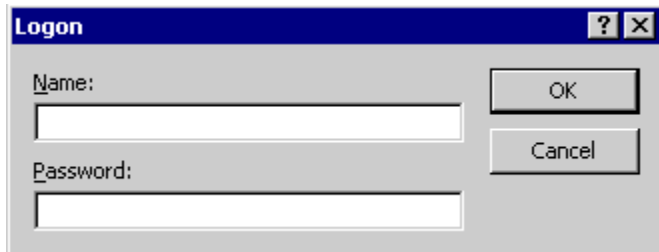


Figure 2-2
Logon dialog box

The PB FIRST main menu appears (Figure 2-5, page 2-6).

Postal Data Expiration Warning

A warning now appears in the PB FIRST main menu (between the Help and Exit buttons) when your Postal Data information is about to expire (Figure 2-3) or has expired (Figure 2-4). As with SmartMailer, this gives you an opportunity to install your latest Postal Data CD prior to expiration to avoid interruption of PB FIRST postal processing functionality. If this warning appears and you have not yet received the latest CD, go to: www.pitneybowes.com/us and click **Support**.

2 The Basics

Launching PB FIRST

Postal Data Expiration Warning

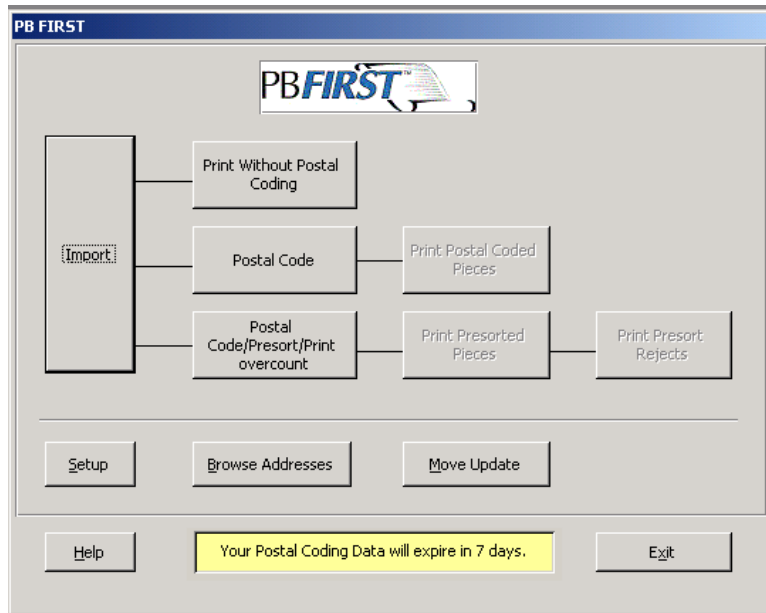


Figure 2-3
Upon launch, you are notified if your Postal Data is soon to expire.

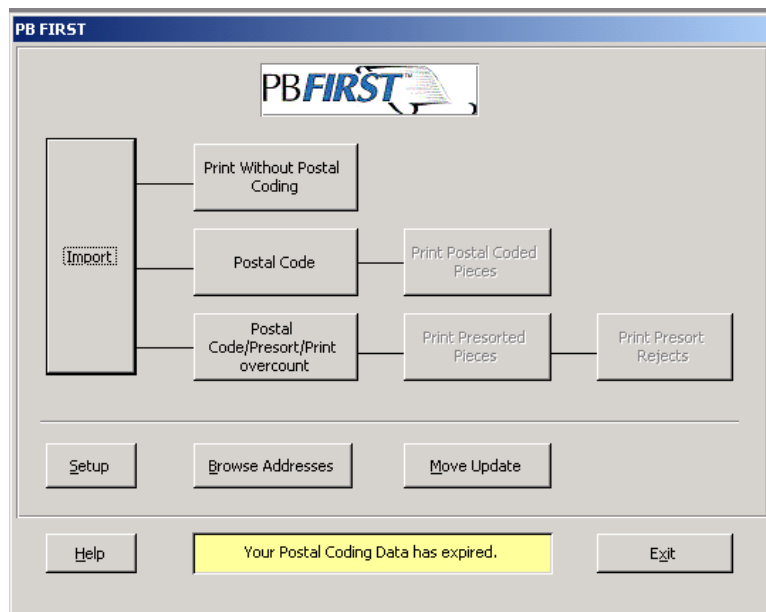


Figure 2-4
Upon launch, you are notified if your Postal Data has expired.

Launching PB FIRST

Changing Your Logon Password



NOTE: Please remember your logon password! If you forget it, you must phone the Pitney Bowes Tech Support Center to have the PB FIRST administrator reset it!

To change the PB FIRST logon password for any user:

1. Log on to PB FIRST using the desired user name and password.
2. On the menu bar of the PB FIRST window in Access, click **Tools > Security > User and Group Accounts** (Figure 2-5).

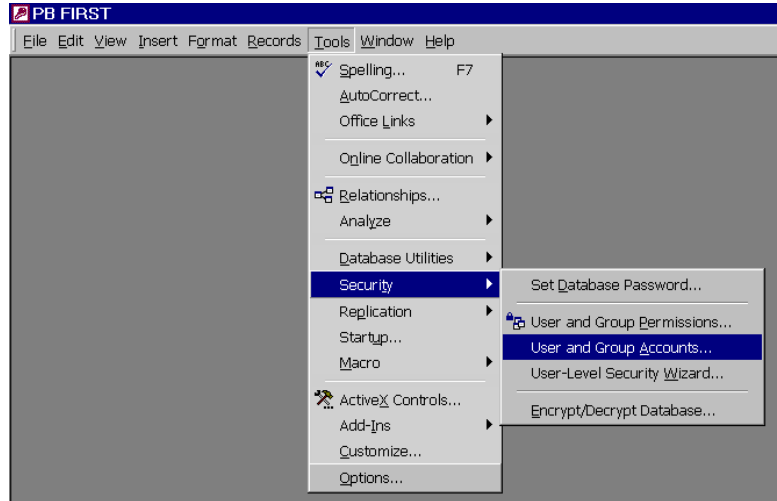


Figure 2-5
Navigating to Security tools from the menu bar in Access

3. In the User and Group Accounts dialog box, click the **Change Logon Password** tab (Figure 2-6).
4. Type the old password and new password (twice) in the fields provided.
5. Click **Apply**, then **OK**.



Figure 2-6
Changing the PB FIRST logon password

2 The Basics

PB FIRST Main Menu

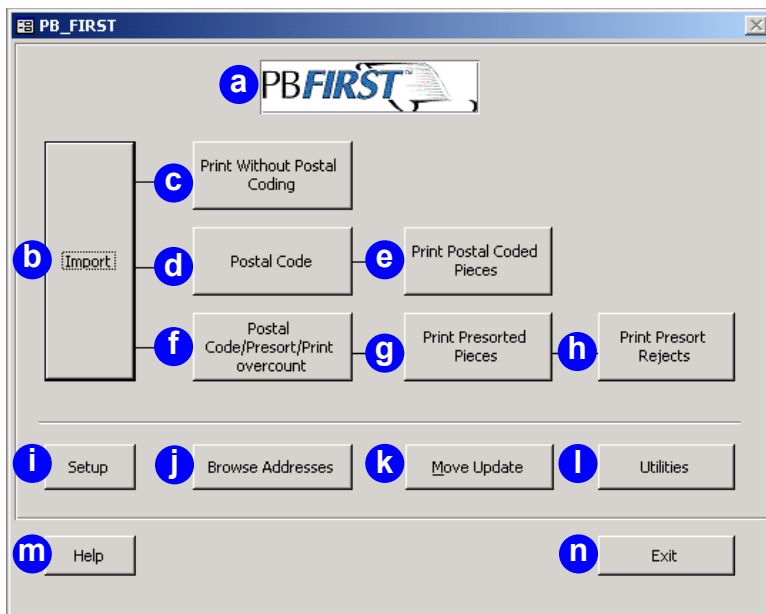


Figure 2-7
PB FIRST main menu as it appears after launching PB FIRST

Table 2-1 Description of PB FIRST Main Menu (Figure 2-7)	
a	Double-clicking on this logo displays PB FIRST software version information.
b	Imports the input file.
c	Prints records without postal coding addresses.
d	Postal codes addresses but doesn't print records.
e	Prints the postal coded pieces.
f	Postal codes and presorts addresses, and prints only records exceeding equipment capacity (overcount).
g	Prints the presorted pieces.
h	Prints the pieces that could not be presorted.
i	Connects the Advanced User to a series of dialog boxes for configuring the PB FIRST job.
j	Allows you to browse through destination addresses in the record set and to print or reprint selected pieces.

PB FIRST Main Menu

k	Connects you to VeriMove™ Net, a Pitney Bowes service that allows you to update your mailing list from the USPS National Change of Address (NCOA) database. You must apply for this service in order to use it. For more information, see Chapter 4.
l	Provides access to check printing functions such as managing logs, managing privileges, encrypting signatures, and managing accounts. (This button will only appear for PB FIRST installations that have activated the check printing option, per your sales agreement.) For more information, see Chapter 5.
m	Connects you to PB FIRST Help.
n	Exits the program.

To learn more about printing, postal coding, presorting, overcount items, and presort rejects, turn to the section Overview of a PB FIRST Job, elsewhere in this chapter.

Advanced User Setup

An Advanced User has access to the Advanced User Setup dialog box for selecting certain options and modifying the PB FIRST job prior to importing the input file.

Accessing Advanced User Setup

To access Advanced User Setup:

1. Click **Setup** in the PB FIRST main menu (Figure 2-7) to display the Advanced User Setup dialog box (Figure 2-8).
2. Click the desired option set in the left panel:
 - Job Options
 - Project Options
 - Postal Code
 - Data File Type (enabled if importing a data file)
 - Data File Setup (enabled if importing a data file)
3. Select your options, as desired.
4. Select another option set from the left panel menu.

OR

Click **Apply** or **Done** to save all changes and return to the PB FIRST main menu. Click **Cancel** to exit without saving.



NOTE: When you make changes in any option set in the Advanced User Setup dialog box, you do NOT have to click the Apply button to save your changes. There is an "implied Apply" function which saves your changes for you. Therefore, if you make any changes you do NOT wish to save, you MUST click the Cancel button before exiting that screen in order to void the changes!

The pages that follow provide an overview of the Advanced User Setup dialog box. To learn about your setup and configuration options in more detail, refer to Chapter 4, *Beyond the Basics*.

Advanced User Setup

Advanced User Setup Dialog Box

Job Options

Figure 2-8
Advanced User Setup dialog box — Job Options

Table 2-2 Advanced User Setup Dialog Box: Job Options	
a	Locate and select the path for the input file using Browse button.
b	Select input file type (text or data).
c	Select job type (DocuMatch® DC115, DocuMatch® DC225, Click & Mail™, 3 Series™, 5 Series™, DI350, DI400, DI800, Env, ProPack BC, DI900 BC, DI900 OMR).
d	Select maximum number of pages per mailpiece. For 3 Series/5 Series and DI350/DI400/DI800, the maximum is 6 for simplex printing, 12 for duplex printing. For DocuMatch DC115, 4 for simplex, 8 for duplex. For DI900/DI950, 8 for simplex, 16 for duplex.
e	Select maximum number of pages for overcount group splitting.
f	Enable a warning that notifies you during importing when a document's page count exceeds 20 pages.
g	Enable the option to print scan map (labels) next to OMR marks (if not enabled, plain OMR marks are printed). This option is grayed out if job type selected does not involve OMR marks.
h	Select to log or display the number of document and mailpieces at the end of import.
i	If DocuMatch DC115 is selected for job type, you can locate and select the path for the DocuMatch .JOB file for mailable items, using the Browse button.
j	Click to go to the Configuration dialog box to configure additional setup options, if necessary.



NOTE: For Item "h" - If "Batch Mode" option is checked in the Project Option screen (see Figure 2-9), the number of document and mailpieces is written to the log file for that batch and no display is shown. If "Batch Mode" is not checked, only a display is shown; it is not logged.

Advanced User Setup

Advanced User Setup Dialog Box

Project Options

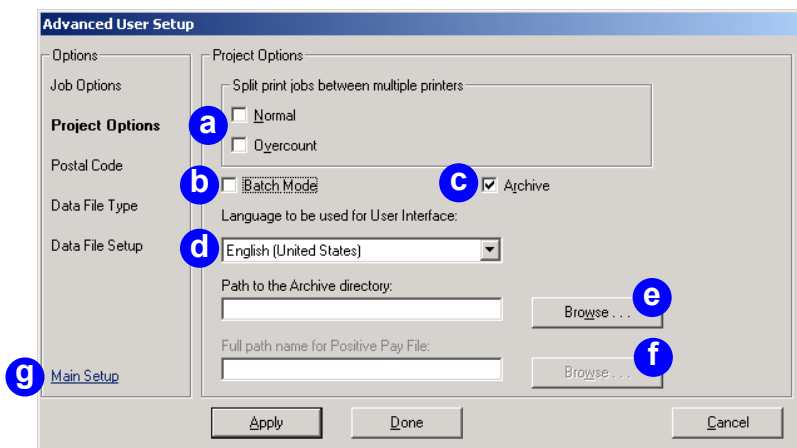


Figure 2-9
Advanced User Setup dialog box — Project Options

Table 2-3 Advanced User Setup Dialog Box: Project Options	
a	Enable job splitting among multiple printers (also known as load balancing) as well as specify if you wish to include overcount items for this printing option.
b	Enable Batch (clickless) mode so you can run a job from start to finish without user intervention.
c	Enable Archiving.
d	Select the language to be used for the PB FIRST user interface.
e	Locate and select the path to the Archive directory (if Archiving has been enabled) using the Browse button.
f	Locate and select the path for the Positive Pay output file (only for PB FIRST installations configured for the check printing option, per your sales agreement). This field is active for PB FIRST jobs configured for check printing and Positive Pay by your Pitney Bowes Systems Engineer, per your sales agreement.
g	Click to go to the Configuration dialog box to configure additional setup options, if necessary.

Advanced User Setup

Advanced User Setup Dialog Box

Postal Code

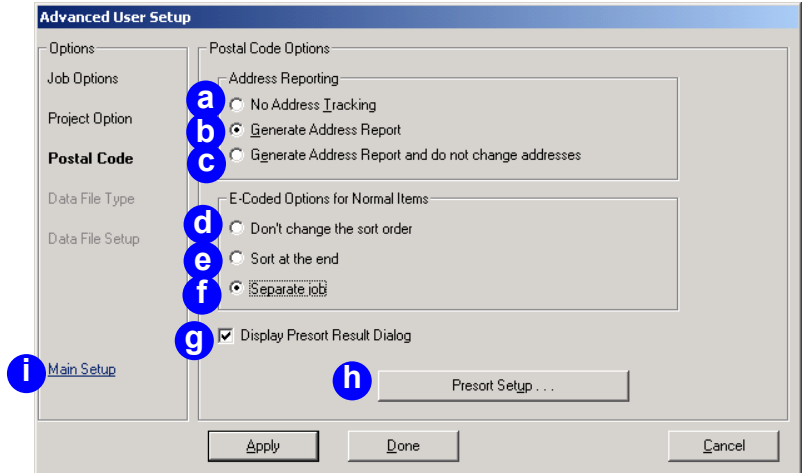


Figure 2-10

Advanced User Setup dialog box — Postal Code option set

Table 2-4 Advanced User Setup Dialog Box: Postal Code Option Set	
a	Disable address change tracking so that no report is generated (of changed addresses) when the system does postal coding through SmartMailer™.
b	Enable address change tracking so that the system generates a report of changed addresses when it does postal coding through SmartMailer.
c	Enable a preliminary, first-pass of address change tracking so that the system does NOT postal code or change addresses, but generates a report of the addresses it <i>would have</i> changed.
d	Leave error-coded pieces in their normal order in the mail job.
e	Enable sorting of error-coded pieces to the end of the list in the mail job.
f	Enable printing of error-coded pieces as a separate job.
g	Enable presort results dialog, where you can request to view the results after presorting is completed.
h	Click on the Presort Setup button to access the SmartMailer Presort Setup dialogs, where you can select different presort options directly from PB FIRST without having to launch SmartMailer.
i	Click to go to the Configuration dialog box to configure additional setup options, if necessary.

Advanced User Setup Data File Type

Advanced User Setup Dialog Box

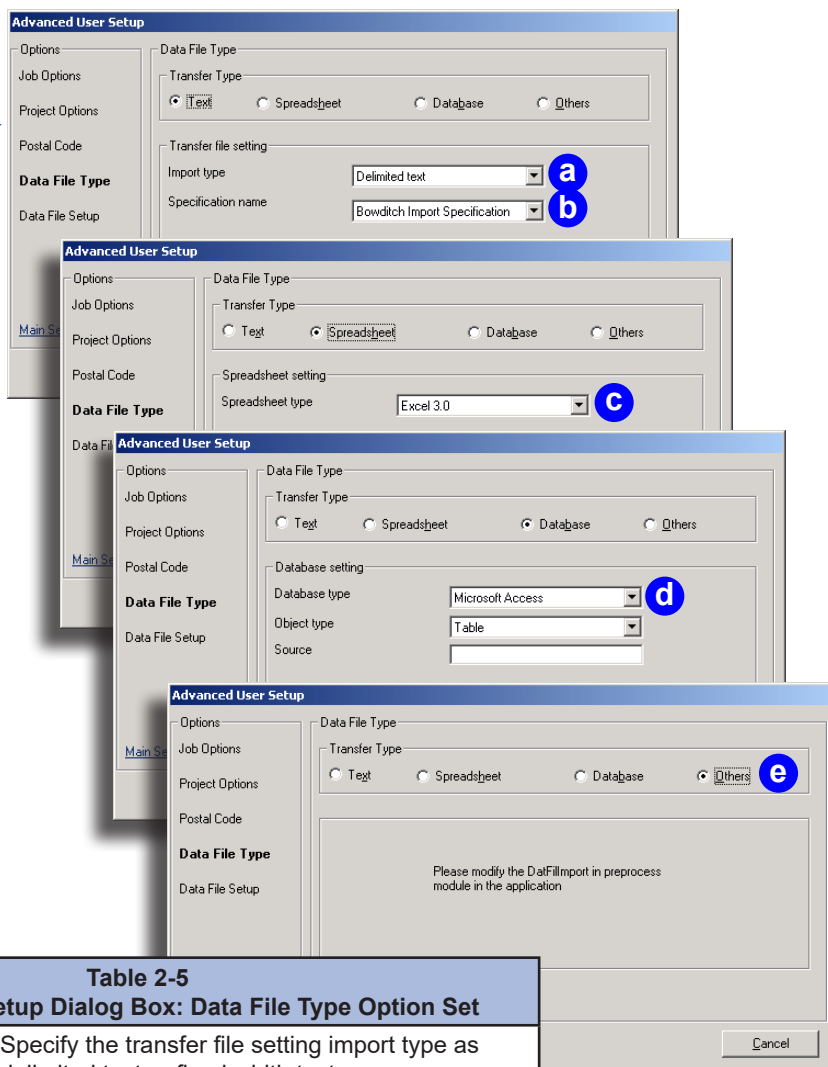


Figure 2-11
Advanced User Setup
dialog box — Data File
Type option set

Table 2-5 Advanced User Setup Dialog Box: Data File Type Option Set		
Text	a	Specify the transfer file setting import type as delimited text or fixed width text.
	b	View the file import specification default name and change the name, if desired.
Spreadsheet	c	Select spreadsheet type.
Database	d	Select database type, object type, and view the database source.
Others	e	Select Others for data file transfer types or options not covered above. Consult with your Pitney Bowes Systems Engineer regarding any such special configuration requirements.

Advanced User Setup

Advanced User Setup Dialog Box

Data File Setup

Figure 2-12
Advanced User Setup dialog box — Data File Setup option set

Table 2-6 Advanced User Setup Dialog Box: Data File Setup Option Set	
a	Enter the fields of the data files to be used for each line of the address block.
b	Enable the grouping option, if desired.
c	Specify field name for grouping option if checkbox (b) above is selected.
d	Click to go to the Configuration dialog box to configure additional setup options, if necessary.

2 The Basics

Overview of a PB FIRST Job

Basic Steps

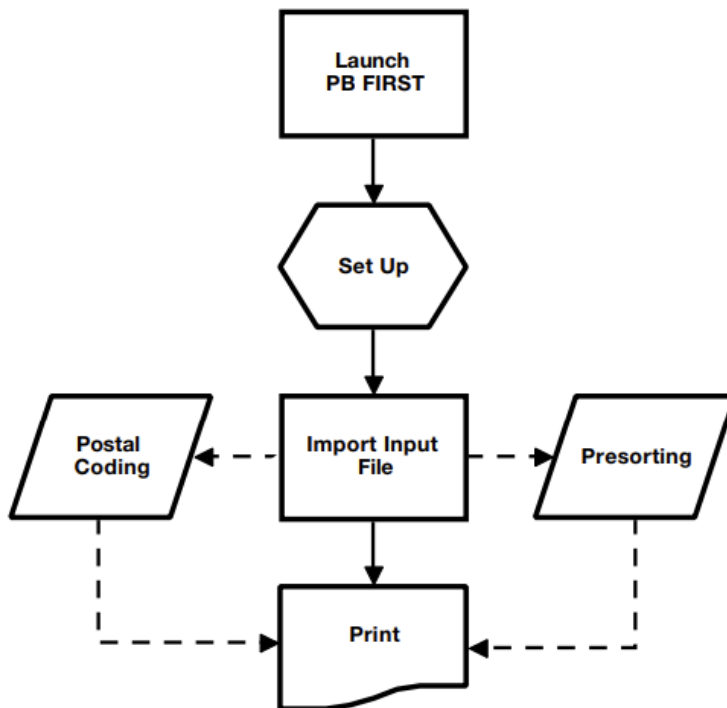


Figure 2-13
Basic steps in a PB FIRST job

Here are the basic steps in a typical PB FIRST job:

1. The User or Advanced User launches PB FIRST.
2. The Advanced User makes any necessary setup modifications in the on-screen Advanced User Setup dialog boxes.
3. The User or Advanced User imports the input file.
4. The User or Advanced User prints the job, which may also include postal coding or postal coding/presorting the mailpieces.

Overview of a PB FIRST Job

What Is Postal Coding?

Postal coding is the process of verifying destination addresses as being deliverable and assigning the correct postal barcodes to them. If you have Pitney Bowes SmartMailer software installed, you are able to postal code mail and run postal coded PB FIRST jobs.

If SmartMailer is not installed, you may select only the **Print Without Postal Coding** option. (This option is also useful for processing internal mail that doesn't require postal coding or presorting.)

What Is Presorting?

Presorting is the process of sorting a postal coded mail job by ZIP code or carrier route in order to obtain postal discounts. The mail job must contain at least 500 pieces of First Class mail or 200 pieces of Standard A mail to qualify for a presort discount.

If your mail job does not meet the requirements for postal coding, you may select only the **Print With Postal Coding** option or **Postal Code > Print Postal Coded Pieces** option.

About Printing a PB FIRST Job

For DocuMatch DC115 users, printing means you are sending an imported file to a DocuMatch Integrated Mail Processor DC115 to be printed and processed.

For users of 3 Series/4 Series/5 Series tabletop inserters, OfficeRight™ DI350 and FastPac™ DI400/DI800, DI500/DI600, or DI900/DI950 inserting systems, printing means you are sending an imported file to a laser printer for a mail job that will be processed on an inserting system.

In either case, the DocuMatch or inserter operator should check beforehand that the proper printer is selected as the default and that the printer setup is correct.

2 The Basics

Overview of a PB FIRST Job

What Are Overcount Items?

Overcount items are mailpieces that have too many pages to be run through a 5 Series, a FastPac DI800, or DI900/DI950 inserting system; or a DocuMatch DC115 (more than six sheets of paper for 5 Series/DI800, more than four sheets of paper for DocuMatch DC115). PB FIRST processes the printing of these overcount items separately so you are able to manually insert them into envelopes. Overcount mailpieces do not qualify for postage discounts.

What Are Presort Rejects?

Presort reject items are mailpieces that failed presorting.

Turn to Chapter 3 to learn how to run a PB FIRST mail job



Chapter 3

Running a PB FIRST™ Job

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3 Running a PB FIRST™ Job

Before You Begin Importing

The procedures in this chapter assume your PB FIRST software is running. If it isn't, please launch PB FIRST before continuing by double-clicking on the PB FIRST desktop icon for the desired job, or by navigating to the program from your Start Menu.

Before running a PB FIRST™ job, you must ensure that the most recent copy of the input file has been sent or copied to the import directory. The path and file name of the input file can be changed during Advanced User Setup.

Once Advanced User Setup is complete, a User or Advanced User is able to begin the PB FIRST job by importing the input file.

Importing the Input File



To import the input file:

- Click **Import** in the main menu. PB FIRST begins importing the file as configured during installation and job setup or as modified during Advanced User Setup. In the lower left corner of the PB FIRST window in Microsoft® Access, a message monitors the progress of the import (Figure 3-1).

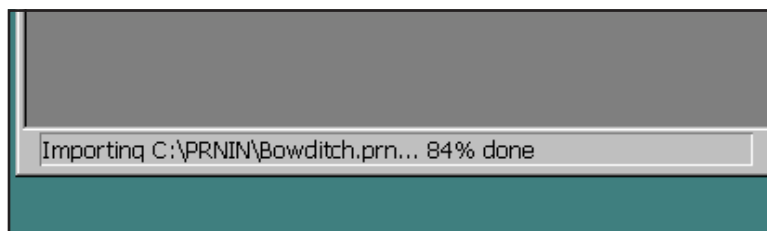


Figure 3-1
Monitoring the import's progress in the lower left corner of the PB FIRST window in Access

Processing Options After Importing



NOTE: Postal coding and presorting are possible only if Pitney Bowes SmartMailer™ software is installed on your computer.

When the import is complete, the main menu indicates five processing options now available to you; the remainder are grayed-out (Figure 3-2).

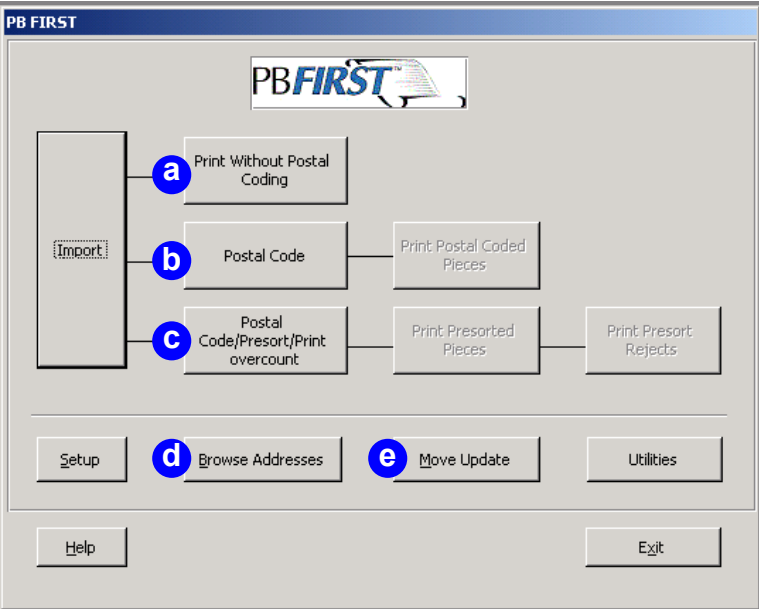


Figure 3-2
After the import is complete, five options are available on the main menu.



NOTE: PB FIRST allows you to take advantage of SmartMailer's Delivery Point Validation (DPV) feature. Refer to SmartMailer online Help for more information.

Table 3-1 Main Menu Options Available After Importing (Figure 3-2)	
a	Prints records without postal coding addresses.
b	Postal codes addresses but doesn't print records.
c	Postal codes and presorts addresses, and prints only records exceeding equipment capacity (overcount).
d	Allows you to browse through destination addresses in the record set and to print or reprint selected pieces.
e	Connects you to VeriMove™ Net, a Pitney Bowes service that allows you to update your mailing list from the USPS National Change of Address (NCOA) database. You must apply for this service in order to use it.

3 Running a PB FIRST™ Job

Printing Without Postal Coding

Print Without Postal Coding



NOTE: Step 1 does not apply to envelope only jobs.

The process of Printing Without Postal Coding generates two print jobs: Overcount Uncoded (non-postal coded) items and Normal Uncoded (non-postal coded) items. (Some jobs do not have overcount items.)

To print without postal coding or presorting:

1. Click **Print Without Postal Coding** in the PB FIRST main menu. If there are any overcount items, a message appears (Figure 3-3), verifying the number of Overcount Uncoded items to print:

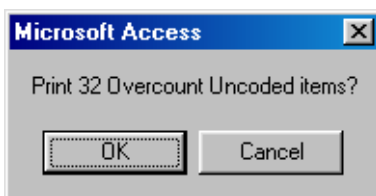


Figure 3-3
Verifying the number of Overcount Uncoded items to print

2. Click **OK** to send the file to print. (If you do not wish to print overcount items at this time, click **Cancel**.)

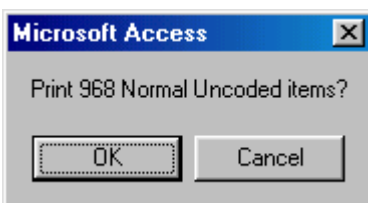


Figure 3-4
Verifying the number of Normal Uncoded items to print

When the overcount items are printed (or if you clicked **Cancel**), a message appears (Figure 3-4) to verify the number of Normal Uncoded items to print.

3. Click **OK** to send the file to print.

Printing without postal coding is now complete.

Postal Coding, Then Printing

Before Postal Coding

You must have SmartMailer™ software installed on your computer to postal code mail. If you attempt to postal code without SmartMailer installed, PB FIRST will not display any of the postal coding windows and the mail job will not be postal coded.

Before starting the postal coding process:

- Make sure the input file has been imported correctly (refer to the Browsing Through Address Records section elsewhere in this chapter).
- Verify that the most recent copy of the SmartMailer Postal Data CD-ROM (formerly known as the ZIP + 4 and Carrier Route Address Directory) is installed. You must have this CD in the CD-ROM drive or copied onto your hard drive in order to postal code.

Postal Coding a Mail Job

Postal Code

To postal code a mail job:

1. Click **Postal Code** in the PB FIRST main menu. The SmartMailer – CASS Postal Coding Status message box appears (Figure 3-5). It provides the number and percent of addresses in the file that have been successfully postal coded.
2. When postal coding is done, click **OK**. The Postal Coding Reports dialog box appears (Figure 3-6).



NOTE: PB FIRST Users and Advanced Users should have a basic knowledge of postal regulations and of SmartMailer software before attempting to postal code or presort. Refer to SmartMailer online Help for more information.

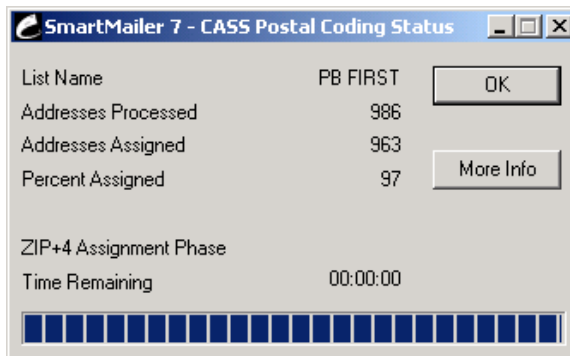


Figure 3-5
SmartMailer-CASS Postal Coding Status message

3 Running a PB FIRST™ Job

Postal Coding, Then Printing



Figure 3-6
Postal Coding Reports dialog box

Preview the reports, print them, or click **Cancel** to return to the PB FIRST main menu.

Postal coding is now complete.

Printing a Postal Coded Mail Job

Print Postal Coded
Pieces

To print the postal coded mail job:

1. Click **Print Postal Coded Pieces** in the PB FIRST main menu. A message appears (Figure 3-7) verifying the number of Overcount Postal Coded items to print:
2. Click **OK** to begin printing. (If you do not wish to print overcount items at this time, click on **Cancel**.)

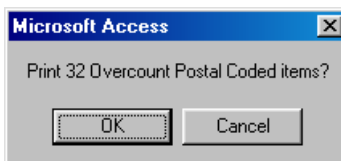


Figure 3-7
Verifying the number
of Overcount Postal Coded
items to print

A message appears (Figure 3-8) to verify the number of Normal Postal Coded items to print:

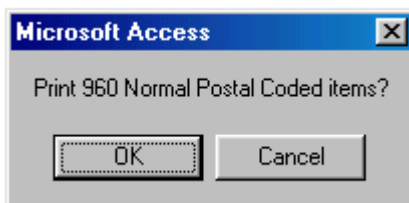


Figure 3-8
Verifying the number
of Normal Postal Coded
items to print

3. Click **OK** to print.

Printing of postal coded items is now complete.

Postal Coding/ Presorting, Then Printing

You must have SmartMailer software installed on your computer to postal code mail. If you attempt to postal code without SmartMailer installed, PB FIRST will not display any of the postal coding windows and the mail job will not be coded.

Before starting the postal coding process:

- Make sure the input file has been imported correctly (refer to the *Browsing Through Address Records* section elsewhere in this chapter).
- Make sure there are enough records to qualify for the presort discount (see page 3-12).
- Verify that the current version of SmartMailer is installed. You must have the SmartMailer CD in the CD-ROM drive or copied onto your hard drive in order to postal code.

Postal Coding and Presorting

Postal
Code/Presort/Print
overcount

To postal code, presort, print presort container labels, and print Overcount Uncoded items:

1. Click **Postal Code/Presort/Print Overcount** in the PB FIRST main menu. The SmartMailer – CASS Postal Coding Status message box appears (Figure 3-9). It provides the number and percent of addresses in the file that have been successfully postal coded.



NOTE: PB FIRST Users and Advanced Users should have a basic knowledge of postal regulations and of SmartMailer software before attempting to postal code or presort. Refer to SmartMailer online Help for more information.

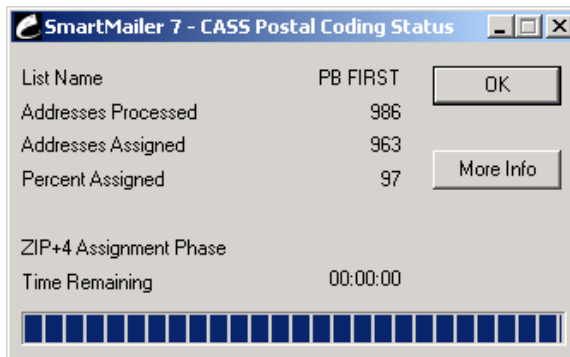


Figure 3-9
SmartMailer-CASS Postal Coding Status message

3 Running a PB FIRST™ Job

Postal Coding/ Presorting, Then Printing

2. When postal coding is done, click **OK** to continue. The Presort Progress message box appears showing presort progress (Figure 3-10):

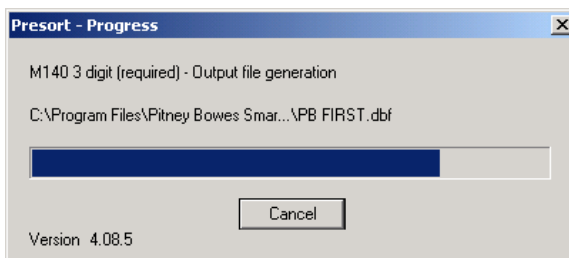


Figure 3-10
Presort Progress message indicating presort progress

3. When presorting is complete, the Presort Finished dialog box is displayed (Figure 3-11) if you selected the Display Presort Results Dialog option in Advanced User Setup prior to importing (See Chapter 2). If you did not select this option, go to the next step.

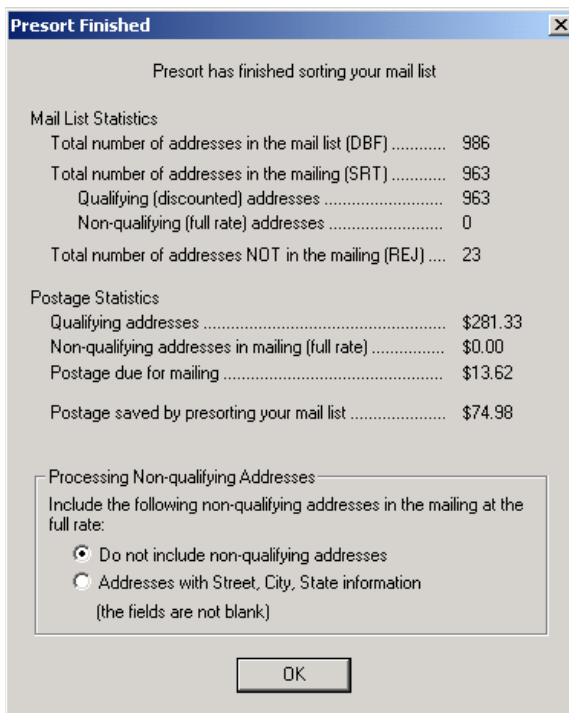


Figure 3-11
Presort Finished dialog box showing presort results

Postal Coding/ Presorting, Then Printing

You have the option to print mailpieces that did not qualify for presorting (if any), as long as their street, city, and state fields were not blank:

- a. Select **Do Not Include Non-Qualifying Addresses** to NOT print these non-qualifying pieces.

Select **Addresses with Street, City, State Information** to print these non-qualifying pieces.

- b. Click **OK**. The Presort Reports dialog box appears (Figure 3-12).
4. When the presort is complete, the Presort Reports dialog box appears (Figure 3-12). Preview the reports, print them, or click **Cancel**.

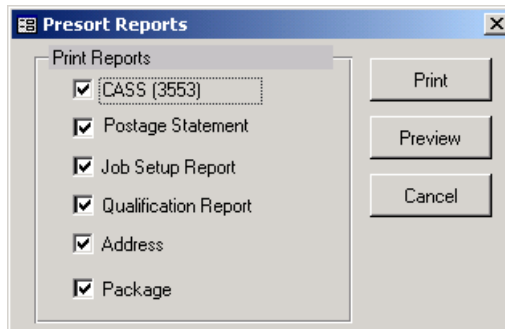


Figure 3-12
Presort Reports dialog box

Printing Presort Container Labels

The Presort Container Labels dialog box appears (Figure 3-13).

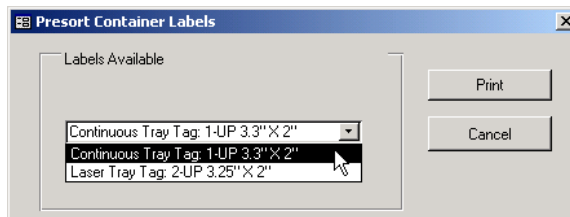


Figure 3-13
Presort Container Labels dialog box

5. Select the appropriate label type from the drop-down list.
6. Click **Print**.

The Print dialog box appears (Figure 3-14):

3 Running a PB FIRST™ Job

Postal Coding/ Presorting, Then Printing

Printing Presort Container Labels

7. Select the appropriate printer from the drop-down list.

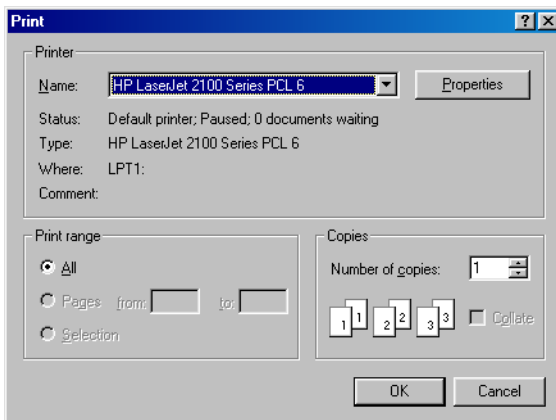


Figure 3-14
Print dialog box

8. Click **OK** to begin printing the container labels. When the labels are printed the following message appears (Figure 3-15):
9. Click **OK** to start printing the Overcount Postal Coded

Printing Overcount Postal Coded Items

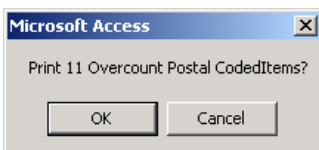


Figure 3-15
Verifying the number of Overcount
postal coded items to print

items. Click **Cancel** to return to the main menu without printing overcount uncoded items.

Postal Coding/ Presorting, Then Printing

Printing Normal Presorted Items and Normal Presorted Reject Items

Print Presorted
Pieces

Print Presort
Rejects



NOTE: To learn how to print presort rejects with your mail job rather than separately, refer to Presort Rejects Printed with Mail Job in Chapter 4 of this Software User Guide.

To print Normal Presorted items and Normal Presorted Reject items:

1. Click **Print Presorted Pieces** in the PB FIRST main menu. The following message appears to verify the amount of Normal Presorted items to print (Figure 3-

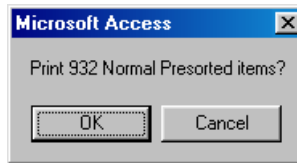


Figure 3-16
Verifying the number of Normal
Presorted items to print

16):

2. Click **OK** to print the Normal Presorted items.
3. Click **Print Presorted Rejects**. The following message appears to verify the amount of Normal Presort Reject

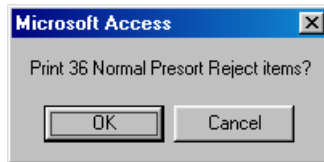


Figure 3-17
Verifying the number of Normal
Presort Reject items to print

items to print (Figure 3-17):

4. Click **OK** to print the Normal Presort Reject items.

Printing of postal coded/presorted items is now complete.

3 Running a PB FIRST™ Job

Postal Coding/ Presorting, Then Printing

Minimum Postal Coded Records to Qualify for Presort Discount

To qualify for a presort discount, your mail job must contain at least 500 postal coded records for First Class mail or 200 postal coded records for Standard A mail.

If you click the **Postal Code/Presort/Print Overcount** button in the main menu but do not postal code enough pieces to qualify for a presort discount, the following message appears (Figure 3-18):



Figure 3-18
**Insufficient postal coded pieces to
qualify for a presort discount.**

Click **OK** to return to the main menu.

Browsing Through Address Records

Individual Addresses



Browsing allows you to view or print destination address records after you import, postal code, or postal code/presort them. Depending on when you browse the records, certain fields may be blank.

To browse and view individual addresses:

1. Click **Browse Addresses** in the PB FIRST main menu. The Browse Addresses dialog box appears (Figure 3-19a and 3-19b). It defaults to the first record in your mail job.
2. Click on the right arrow beside the Record field to advance through the remaining records.

Figure 3-19a
Browse Addresses dialog box

The screenshot shows the 'Browse Addresses' dialog box. It has a title bar with a close button. The main area contains several input fields for address information: DEST1 through DEST6, COMPANY, STREET2, STREET, UNIT, CITY, STATE, ZIP, ZIP4, DPBC, CRRT, ERROR CO, PS_BRK, PS_DEL, ADDR NO, No Pages, Tray No, and Sequence No. There are also radio buttons for 'View/Print' (Normal and Overcount) and buttons for 'Find' and 'Print Selected Pieces'. At the bottom, there is a 'Record' field with navigation arrows and a status bar showing '7 of 986 (Filtered)'. The fields are labeled with letters a, b, c, and d.

Table 3-2a Description of Browse Addresses Dialog Box	
a	Address fields DEST1 through DEST6 are often blank, or may contain other address information such as suite or floor numbers.
b	The path and name of the imported file.
c	Here you can select records having either a Normal or Overcount number of pages to view and print.
d	Indicates the record number of the destination address.

3 Running a PB FIRST™ Job

Browsing Through Address Records

Individual Addresses



NOTE: Fields (e) through (j) are populated during postal coding and/or presorting (Figure 3-19b).

The 'Browse Addresses' dialog box is shown with various fields and buttons. Fields are labeled with letters in blue circles: (e) for ZIP4, (f) for DPBC, (g) for CRRT, (h) for ERROR CD, (i) for PS_BRK, (j) for PS_DEL, (k) for No Pages, (l) for Sequence No, (m) for Start Seq, and (n) for Print Selected Pieces.

Figure 3-19b
Browse Addresses dialog box



NOTE: The sequence number (which may be different from the record number) determines the order in which the records were imported and the order in which they'll print when printing selected pieces. For more information, see page 3-17.

Table 3-2b Description of Browse Addresses Dialog Box	
e	Four-digit expanded code.
f	Delivery point barcode.
g	Carrier route.
h	Address record error code.
i	Presort break.
j	Presort optional endorsement line.
k	Indicates the number of pages to be printed for a viewed record.
l	Sequence number of the current record.
m	Starting and ending sequence number to be printed.
n	Click to print record shown or sequence indicated.

Browsing Through Address Records

Finding a Specific Record or Range of Records

To find a specific record using the Browse Addresses dialog box:

1. In the Browse Addresses dialog box, click the field you wish to search. For example, click the **DEST1** field to search by name, or click the **Company** field to search by company.
2. Click **Find**. The Find and Replace dialog box appears (Figure 3-20):

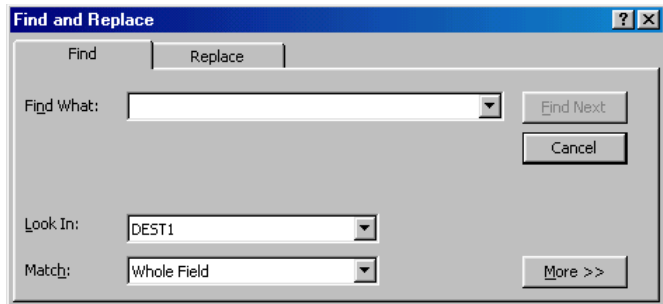


Figure 3-20
Find and Replace dialog box

3. If you want to specify only part of the data in a field, click on the **Match** drop-down box and select **Any Part of Field**.
4. Enter the text you want to search for in the Find What drop-down field.
5. Click **Find Next** to begin the search. Results appear in the Browse Addresses dialog box. If desired, continue searching for more matches by clicking **Find Next**. When all or no occurrences of the search criteria have been found, the following message appears (Figure 3-21):



Figure 3-21
This message appears when the searched item was not found.

3 Running a PB FIRST™ Job

Printing Selected Pieces

The Print Selected Pieces button in the Browse Addresses dialog box is useful for printing sample mail items and reprinting pages lost or damaged in the printing or collation process. You have the option to print a single item, a sequence of items, or an entire mail job.

The Print Selected Pieces option will print different mail items, depending on when you click the Browse addresses button in the main menu. Refer to Table 3-3 below:

Table 3-3 Browse Address Dialog Box Print Selected Pieces Option	
To Print or Reprint:	Click the Browse Addresses Button:
Selected uncoded items	After importing
Selected postal coded items	After clicking the Postal Code button
Selected presorted items	After clicking on the Print Presorted Pieces button
Selected presorted reject items	After clicking on the Print Presort Rejects button

Sequence Number

After clicking Browse Addresses in the main menu, you can use the Find button in the Browse Addresses dialog box to figure out the sequence number of the mail item(s) to print.

The sequence number field (Figure 3-19b, page 3-15) displays the order in which the records will print. This is the number the software uses to determine which record(s) to print and may be different from the record number at the bottom left of the Browse Addresses dialog box (Figure 3-19a, page 3-14). The default value of the Starting Seq field is 1 and the default value for Ending Seq is blank (last record). Leave the Ending Seq field blank if you want to print to the last record of the mail job.

Printing Selected Pieces

Printing One Mail Item

To print one mail item:

1. Find the mail item (See page 3-16, *Specific Records*).
2. In the Browse Addresses dialog box, enter the sequence number into the **Start Seq** and **End Seq** field (Figure 3-19b, page 3-15).
3. Click **Print Selected Pieces**.
4. Click **OK** as prompted (Figure 3-22) to print the mail item.

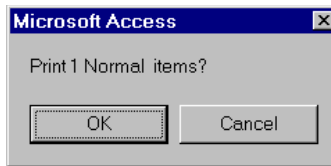


Figure 3-22
Click OK to print the one selected item

Printing Multiple Mail Items (or an Entire Mail Job)

To print multiple mail items (or an entire mail job):

1. Locate the starting sequence number (see *Browsing Through Address Records*, pages 3-14 through 3-15, and *Specific Records*, page 3-16).
2. In the Browse Addresses dialog box, enter the sequence number of the first mail item into the **Start Seq** field (Figure 3-19b, page 3-15).
3. Enter the ending sequence number into the **End Seq** field. If you are printing the rest of the mail job, leave the ending sequence number blank.
4. Click **Print Selected Pieces**.
5. Click **OK** as prompted (Figure 3-23) to print the mail items.

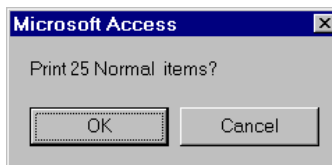


Figure 3-23
Click OK to print selected range of items



NOTE: You cannot print a single piece simply by browsing to a record and clicking the print button. You must enter the starting and ending sequence number, then click the **Print Select Pieces** button.

3 Running a PB FIRST™ Job

Printing Selected Pieces

Job Splitting Among Multiple Printers (Load Balancing) from the Browse Addresses Dialog Box



NOTE: If you select or clear this option in Advanced User Setup after importing, you must re-import the input file for the change to take effect.

When running a PB FIRST job, you can split the printing among multiple printers for normal and/or overcount items. This option is also known as load balancing. (See Chapter 4 for more details.) PB FIRST version 11.03 adds the ability to print from multiple printers *directly from the Browse Addresses dialog box*.

To job split among multiple printers from the Browse Addresses dialog box:

1. Click **Setup** in the PB FIRST main menu to display the Advanced User Setup dialog box.
2. Click **Project Options** in the left panel.
3. Select the **Normal** or **Overcount** checkbox (or both), to job split normal items, overcount items, or both.
4. Click **Apply**, then **Done**, to return to the main menu.
5. Click **Browse Addresses**.
6. Follow the procedures detailed on the previous page in this section for printing one or multiple mail items.
7. When you click **Print Selected Pieces** in the Browse Addresses dialog box, the system displays the Load Balanced Printing dialog box (Figure 3-24), where you can specify the range of pieces for each printer, before printing begins.
8. Click **Print** to begin printing the job.

Printer #	From	To	Printer Destination
1	1	334	[Dropdown]
2	335	668	[Dropdown]
3	669	1003	[Dropdown]
4	0	0	[Dropdown]
5	0	0	[Dropdown]
6	0	0	[Dropdown]
7	0	0	[Dropdown]
8	0	0	[Dropdown]

Figure 3-24
Splitting a job among multiple printers



Chapter 4

Beyond the Basics

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4 Beyond the Basics

Address Change Tracking

The address change tracking feature gives you the ability to control and report on SmartMailer™ changes to destination addresses.

In general, SmartMailer software identifies addresses that do not match the USPS postal coding database. If it finds a unique variation on the address that does match, it changes the supplied address to the address in the database. Usually this results in an improvement to the accuracy of the address, for example, correcting the spelling of the street or city name. In some cases, however, it may make undesirable changes.

Using the address change tracking feature, an Advanced User can tell PB FIRST™ to prevent SmartMailer from making any changes to the STREET, CITY, or STATE fields other than converting the street suffix (Street, Road, Avenue, and so on) to the standard abbreviation. To avoid false matches due to standardization, PB FIRST uses SmartMailer's Relaxation Mode postal coding, which will automatically flag only those addresses where it has made a significant change.

When you enable address change tracking, PB FIRST postal codes in three stages. In the first pass, done in non-Relaxation Mode, PB FIRST compares the original destination addresses to the results of a trial postal coding run, so that a report can be generated later, showing what would have been changed if address change tracking had been disabled. In the second pass, done in Relaxation mode, PB FIRST tells the SmartMailer postal coding engine that if there is a major change to the address, it should NOT perform it. Any addresses that have changes to the STREET, CITY or STATE fields (other than the abbreviations noted above) are locked, so that SmartMailer cannot postal code them. In the third pass, the postal coding process is completed.

Address Change Tracking

The advantages of using this feature are:

- More correct mailings will be processed.
- It lessens the chance of incorrect mailings
- It is a safer mode of processing, if mail must get to the exact destination address

The disadvantages of using this feature are:

- Postal coding takes longer.
- Fewer pieces will qualify for postal discounts.
- The apartment or unit number, if required, must be known and entered correctly.



NOTE: If you select or clear this option in Advanced User Setup after importing, you must re-import the input file for the change to take effect.

To enable or disable the address change tracking option:

1. Click **Setup** in the PB FIRST main menu to display the Advanced User Setup dialog box.
2. Click **Postal Code** in the left panel menu.

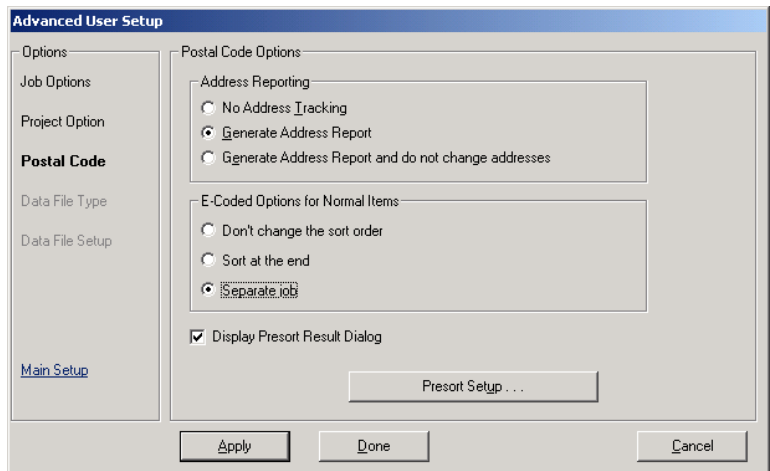


Figure 4-1
Selecting your address reporting option in Advanced User Setup

3. In the Address Reporting section (Figure 4-1):
 - Select **No Address Tracking** to disable the option.
 - Select **Generate Address Report** to enable the option and generate a report of the changes.
 - Select **Generate Address Report and Do Not Change Addresses** to enable a preliminary, first-pass

4 Beyond the Basics

Address Change Tracking

of address change tracking so that the system postal codes and presorts the good addresses (but does not make any significant changes), and then generates a report of the addresses it would have changed.

4. Click **Apply**, then **Done**, to return to the main menu.

Addr Report

Address change tracking can also generate a report that shows the original address and the addresses that would have been changed if Address Change Tracking had been turned off, as well as any addresses that SmartMailer could not postal code in the first pass (error-coded addresses).

As of PB FIRST version 11.03, you can also generate an Address report even when SmartMailer makes its changes by selecting the option Generate Address Report in the Postal Code option set in Advanced User Setup (Figure 4-1).

After postal coding or postal coding/presorting has been completed, PB FIRST prompts you to select your desired report options (see Figures 4-3 and 4-4, next page). Selecting the Address report option prints the Addr report and also exports a file that contains the original and changed addresses. By default the exported data is in c:\prnin\ProbAddr.xls.

To view or print the Addr report following postal coding or postal coding/presorting:

1. Select the **Address** checkbox in the Postal Coding Reports (Figure 4-2) or Presort Reports dialog box

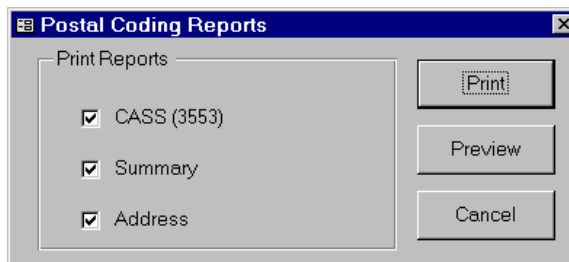


Figure 4-2
Select the Address option to view or print the AddrRelaxation report after postal coding.

Address Change Tracking

Addr Report

(Figure 4-3, next page).

- 2. Click **Preview** to view the report on-screen; click **Print** to print the report. Figure 4-4 shows a sample report in

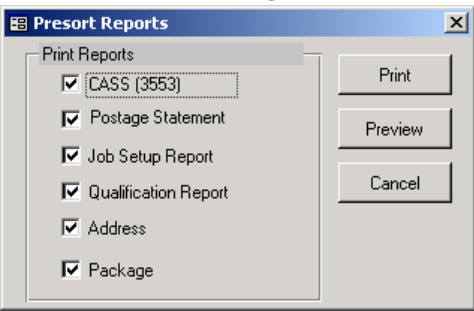


Figure 4-3
Select the Address option to view or print the AddrRelaxation report after postal coding/presorting.



NOTE: As of version 13.02, the Address Report provides the description as well as the error codes of any errors it encounters.

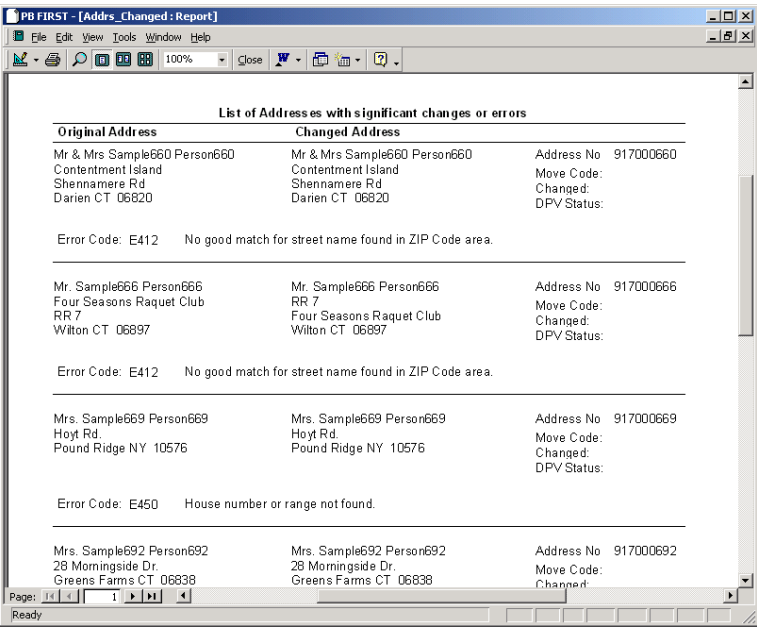


Figure 4-4
Example of an Addr report in preview mode

4 Beyond the Basics

Archiving

PB FIRST allows you to produce an archive of mailpiece documents that have been printed, in the same format as they were printed, in either paper or searchable electronic (PDF) format.

Initial Setup

During PB FIRST installation and initial configuration, your Pitney Bowes Systems Engineer (PBSE) customizes the default Archive report based on your requirements and determines the output format for the archive. The customized report determines where the report information is stored. If you need to save the archive information on your computer's hard drive, the PBSE creates a port on a specified printer that will go to a particular file on the hard drive.

Enabling or Disabling

An Advanced User can turn this option on or off prior to running the PB FIRST job.

To enable or disable archiving:

1. Click **Setup** in the PB FIRST main menu to display the Advanced User Setup dialog box.
2. Click **Project Options** in the left panel menu.
3. Select the **Archive** checkbox.
4. Click **Done** to return to the main menu.

Selecting the Path to the Archive Directory

You can choose to select a path to the Archive directory in the Advanced User Setup dialog box or leave the field blank, in which case PB FIRST will not save the archive on your computer's hard drive.



NOTE: If you select or clear this option in Advanced User Setup after importing, you must re-import the input file for the change to take effect.

To select the path to the Archive directory:

1. Click **Setup** in the PB FIRST main menu to display the Advanced User Setup dialog box.
2. Click **Project Options** in the left panel menu.
3. Select the **Archive** checkbox.
4. In the Path to the Archive Directory field, select the path by typing it or by using the **Browse** button.
5. Click **Done** to return to the main menu.

Archiving

Archiving and the Importing Process

If archiving is enabled, the importing process does the following:

- Archives (before any import) any documents that have been printed but not archived.
- Generates a unique directory name to be created under the Archive directory (if the path to the Archive directory is specified in Advanced User Setup).
- Saves the full path name (if specified in Advanced User Setup). This directory will be used to save all the archives for this run (here, a run refers to what gets printed for this job).
- Generates a new field in the CommonInfo table, indicating whether a document has been archived.

Archiving and the Printing Process

If archiving is enabled, the printing process does the following:

- Archives any documents (before any printing) that have been printed but not archived.
- After printing, flags the document that it has been printed but not archived.
- After printing is completed, the system begins archiving.

4 Beyond the Basics

Barcode Support for 5 Series/ DI800 ProPack and DI900/DI950

One of the most important features of PB FIRST is its ability to generate barcodes that can be read by a Pitney Bowes:

- FastPac™ DI800 (5 Series) inserter equipped with the ProPack (Production Package) option. This option consists of the ProPack sheet feeder, optional outsort module, and optional high capacity loader. All units are used in addition to the normal inserter modules, giving even greater flexibility to DI800/5 Series mail processing capabilities.
- FastPac™ DI900/DI950 inserting system

These barcodes are generated based on data entered by your Pitney Bowes Systems Engineer (PBSE) during PB FIRST installation and initial setup. The PBSE determines your report requirements and creates the necessary PB FIRST ProPack barcode jobs for you. Each job will have its own PB FIRST desktop icon (shortcut).



Generic example of PB FIRST desktop shortcut

To run a barcode job:

- Double-click the **PB FIRST** desktop shortcut created for it by your PBSE and proceed with the job.

Batch Mode

Batch Mode processing allows you to run a PB FIRST job from start to finish with one mouse click.

When Batch Mode is enabled, upon launch PB FIRST displays a dialog box (Figure 4-5) for about 10 seconds, giving you the option to cancel batch operations. If you do not cancel, it proceeds through a predetermined sequence of operations. By default, PB FIRST then does an import of address records and counts the number of records it has imported.

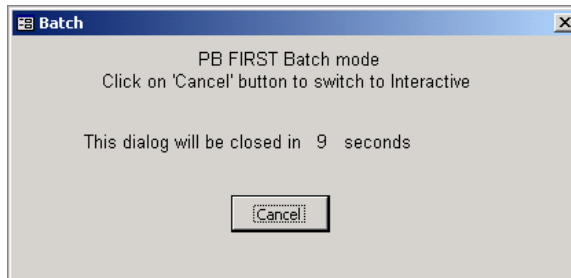


Figure 4-5
If Batch mode has been enabled, you will see this dialog box upon launching PB FIRST.



NOTE: The minimum number of postal coded address records required for presorting First Class mail is 500. The default minimum for Batch Mode presorting is set at 600 to allow for a certain percentage of records that may fail postal coding (typically about 10%) and thus would not qualify for presort discounts.

By default, if there are 600 or more records, PB FIRST performs the Postal Code/Presort/Print Overcount operation, then prints the presort reports, the presorted pieces, and finally the presort rejects. If desired, your Pitney Bowes Systems Engineer can change the sequence of operations performed in Batch Mode.

If there are fewer than 600 records, PB FIRST postal codes, then prints the postal coding reports, overcount pieces, and postal coded pieces.

PB FIRST exits when it is done or encounters an error.

In Batch Mode, all confirmation dialogs are disabled and if an error message would have been displayed, the system writes the error text to a file in the project directory:

<project path>\<project name>.LOG

4 Beyond the Basics

Batch Mode

To enable Batch Mode:

1. Click **Setup** in the PB FIRST main menu to display the Advanced User Setup dialog box.
2. Click **Project Options** in the left panel menu.
3. Select the **Batch Mode** checkbox.
4. Click **Apply**, then **Done**, to return to the main menu.

To run a job in Batch Mode:

- Double-click the **PB FIRST** desktop shortcut created for it by your Pitney Bowes System Engineer (PBSE) and proceed with the job.

Data File Importing

PB FIRST permits the importing of data files such as Excel, comma delimited, and Access, with one record or row per document. The data can be in any format that Microsoft® Access 2000 or Access XP can import.

During processing, the system imports the data (configured by your PBSE) from the external file and uses selected fields to form the PB FIRST address. From this point on, all the other PB FIRST capabilities work exactly as if the data had been imported from a print image or text file.



NOTE: If you select or clear this option in Advanced User Setup after importing, you must re-import the input file for the change to take effect.

To enable Data File Importing:

1. Click **Setup** in the PB FIRST main menu to display the Advanced User Setup dialog box.
2. Click **Job Options** in the left panel menu.
3. Select **Data** in the Input Type drop-down list.
4. Click **Data File Type** in the left panel menu.
5. Select the desired Transfer Type option: Text, Spreadsheet, Database, or Other.
6. Select the appropriate options for that transfer type.
7. Click **Data File Setup** in the left panel menu.
8. Type the appropriate information in the fields provided, as instructed in the Data File Setup section (Figure 4-6).
9. Click on **Apply**, then **Done**, to return to the main menu.

The screenshot shows the 'Advanced User Setup' dialog box with the 'Data File Setup' section selected in the left-hand menu. The main area contains instructions for entering field names for each line of the address block. It includes a list of input fields with the following values: 'Title,First,Last', 'company', 'unit', 'street', and 'city,state, makezip(zip, zip4)'. Below the list is an 'Enable Grouping' checkbox which is unchecked, and a 'Field Name' input field. At the bottom are 'Apply', 'Done', and 'Cancel' buttons.

Figure 4-6
Entering Data File Setup information

4 Beyond the Basics

Duplex Printing



NOTE: When printing an OMR duplex job, consult your hardware operating guide for special guidelines regarding paper thickness, loading, and so on.



NOTE: As of PB FIRST version 11.03, you can run a grouping job simultaneously with duplex printing.

PB FIRST supports duplex printing for the DocuMatch® Integrated Mail Processor DC115, the FastPac Inserting System DI800, DI900/DI950, and the 5 Series™ tabletop inserter. During PB FIRST installation and initial setup, your Pitney Bowes Systems Engineer (PBSE) determines your report requirements and creates the necessary PB FIRST duplex jobs for you. Each job will have its own PB FIRST desktop icon (shortcut).

For DocuMatch DC115 duplex jobs, the maximum number of printed pages per mailpiece is 8 (four sheets of paper at two printed pages per sheet).

For FastPac DI800 and 5 Series duplex jobs, the maximum number of printed pages per mailpiece is 12 (six sheets of paper at two printed pages per sheet).

For FastPac DI900/DI950, duplex jobs, the maximum number of printed pages per mailpiece is 16 (eight sheets of paper at two printed pages per sheet).

Mailpieces with more than the maximum number of duplex pages will be printed in the Overcount group.

To run a duplex job:

- Double-click the PB FIRST desktop shortcut created for that duplex job by your PBSE and proceed with the job.

Error-Coded Pieces Options

PB FIRST users often have mailings that contain several pieces with incomplete or international addresses. These pieces generally need to be processed differently than normal pieces (for example, distributed as internal mail without postage or mailed externally with international postage) and need to be separated from the rest of the mail job.

Previous versions of PB FIRST allowed such a separation of pieces only when a mail job called for postal coding and presorting, by sending error-coded pieces to the presort reject group (pieces that failed presorting).

With the current release of PB FIRST, users who want to merely postal code without presorting can now separate these error-coded (e-coded) pieces that fail postal coding. Several e-code options are available from the Postal Code Options screen (Figure 4-7):

- **Don't change the sort order** - keeps e-coded pieces within the normal address order
- **Sort at the end** - sends e-coded pieces to the end of the address list
- **Separate job** - allows you to print e-coded pieces separately from the main list

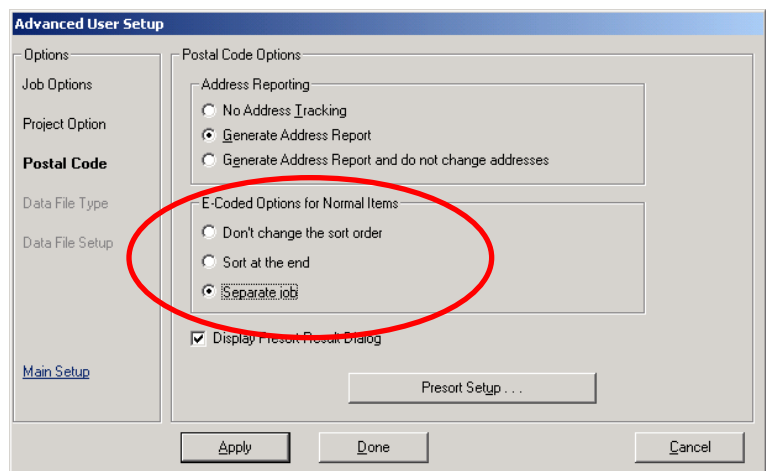


Figure 4-7
Error Code (E-Code) Options

4 Beyond the Basics

Error-Coded Pieces Options

Sort At End Option



NOTE: If you select or clear this option in Advanced User Setup after importing, you must re-import the input file for the change to take effect.

Separate Job Option

To enable the "Sort at End" option:

1. Click **Setup** in the PB FIRST main menu to display the Advanced User Setup dialog box.
2. Click **Postal Code** in the left panel menu.
3. Select the **Sort at the End** checkbox.
4. Click **Done** to the main menu.

If there are no error-coded pieces or only error-coded pieces, enabling this option does not produce any negative effects in PB FIRST performance.

To enable the "Separate Job" option:

1. Click **Setup** in the PB FIRST main menu to display the Advanced User Setup dialog box.
2. Click **Postal Code** in the left panel menu.
3. Select the **Separate Job** checkbox.
4. Click **Done** to the main menu.

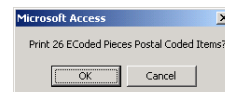
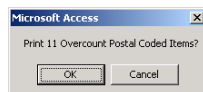
When you enable this option, the e-coded pieces, which have been counted among the overcount and normal postal coded items in the past, are now stored in their own "bucket" for reporting purposes.

Affect on Printing Postal Coded Pieces

If you have checked off **Separate job** in the Postal Code Options screen (Figure 4-7), after you have run Postal Coding and you have clicked Print Postal Codes, you will see prompts (see below) to print:

- Over Count Postal Coded items
- Normal Postal Coded items
- E-coded Postal Coded items

In these prompts, if you select **OK**, the system creates a report of the mailpieces indicated in the dialog box. If you select **Cancel**, the system skips the printing of the pieces indicated.



NOTE: The Print Presort Rejects (button) already includes e-coded pieces (which are not postal coded).

Envelope Printer Support

PB FIRST allows you to print an “envelopes only” job. Using this feature in conjunction with the new data file import feature allows you to process traditional SmartMailer envelope printing applications through PB FIRST.

During PB FIRST installation and initial setup, your Pitney Bowes Systems Engineer determines your envelope printing requirements and creates the necessary PB FIRST envelope jobs for you. Each job will have its own PB FIRST desktop icon (shortcut).

If you are connected to a Pitney Bowes envelope printer and you want to print additional fixed information on the envelopes, (for example, a return address or graphic), you can use the Envelope Printer Accelerator (installed with SmartMailer) to optimize the printing. For more detailed information, refer to SmartMailer online Help.

To run an envelopes only job:

- Double-click the **PB FIRST** desktop shortcut created for it by your PBSE and proceed with the job.

4 Beyond the Basics

Grouping

The grouping option allows you reduce postage costs by combining items for the same destination address and inserting them into one envelope. If the total page count for the same address exceeds the maximum, the whole set prints as an overcount item. (See also *Overcount Group Splitting* in this chapter.)



NOTE: As of PB FIRST version 11.03, you can run a grouping job simultaneously with duplex printing.

PB FIRST version 11.03 adds the ability to process a job that includes both grouping and duplex printing simultaneously. Also as of version 11.03, grouping is now possible with data file importing, which may save you postage on extra mailpieces.

During PB FIRST installation and initial setup, your Pitney Bowes Systems Engineer (PBSE) works with you to determine your requirements and creates the necessary PB FIRST jobs with grouping enabled. Each job will have its own PB FIRST desktop icon (shortcut).

To run a grouping job:

- Double-click the **PB FIRST** desktop shortcut created for it by your PBSE and proceed with the job.

Inserting a Graphic Image

Graphic images can be inserted into a report by an Advanced User (see example in Figure 4-8). You may insert a graphic image only in the following sections of a report:

- Page Header
- Detail
- Page Footer

When placing an image onto the report, follow these guidelines:

- ☐ The image must not be closer than 1/2 in. above or below the OMR mark on the 5 Series report.
- ☐ The image must not be closer than 1/8 in. to the left or right of the OMR mark on the 5 Series report.
- ☐ The image cannot cover the POSTNET barcode in the Page Header section of the report.
- ☐ The work may be too involved, requiring a Pitney Bowes Systems Engineer to perform it.

Pitney Bowes

Page 1 of 1

Mr. Sample001 Person001
22 Homewood Ave
North Haven CT 06473

Qty	Part No.	Description	Each	Total
1	000 10001	WEDGE7, 10001001	1.00	1.00
2	000 10002	WEDGE7, 10002002	2.00	4.00
3	000 10003	WEDGE7, 10003003	3.00	9.00

This is the page footer

In this document, if Sides Read Or Item Or Item Read, Then do it.

If Sides Read Or Item, and Item Read, Then do it.

If Sides Read Or Item, and Item Read, Then do it.

Figure 4-8
Example of a graphic (Pitney Bowes logo) inserted into a report

4 Beyond the Basics

Inserting a Graphic Image

To place a graphic image on a report:

1. With the PB FIRST main menu displayed, press **F11** on your keyboard to display the Database window (Figure 4-9).
2. Click **Reports** in the left panel. The report objects appear in the right frame of the window.
3. Select the desired report, then click **Design** on the toolbar.

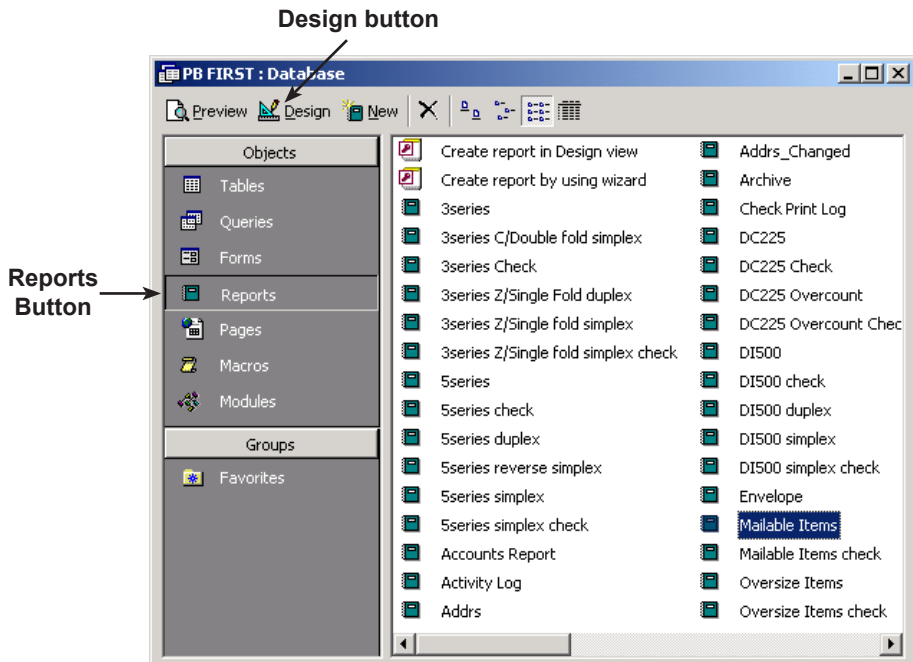


Figure 4-9
Database window, showing report objects

Inserting a Graphic Image

4. In Design View mode, navigate to the section of the report where you want to place the graphic image (Page Header, Detail, Page Footer), then click on the section bar for that section (Figure 4-10).

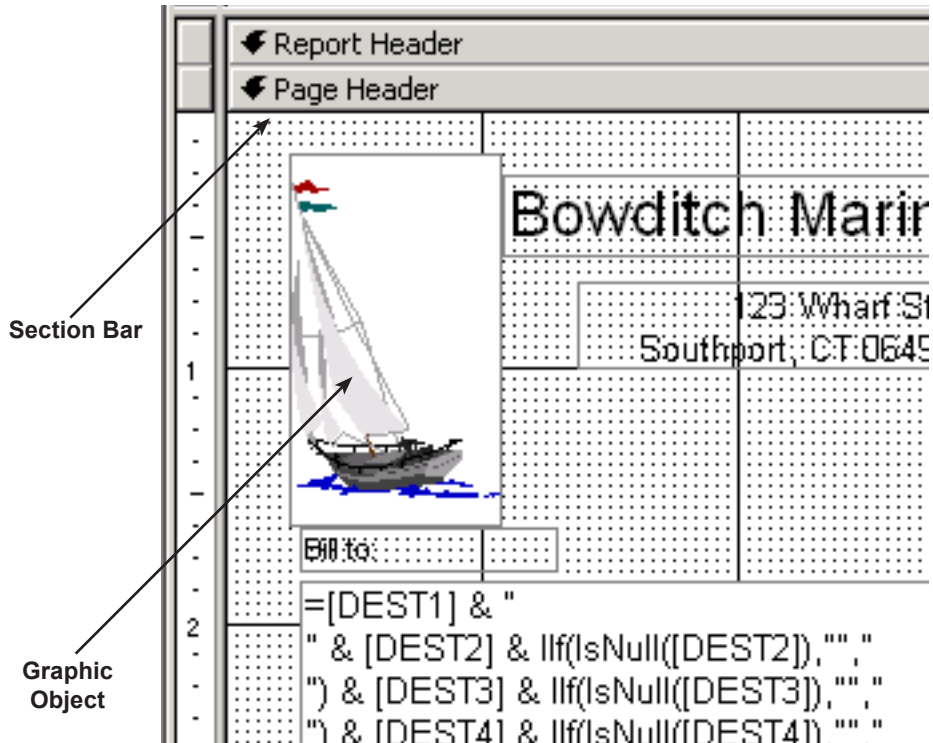


Figure 4-10
Placing a graphic in a report (in Design View mode)



NOTE: If you place a graphic in the Detail section of a report, the graphic will be repeated along with every line of detail. We recommend not placing graphics in the Detail section at all.

5. Click **Insert > Picture**.
6. Locate the desired graphic image file to insert and click **OK**.
7. Place the graphic in the desired location.
8. Close the report. Save your design changes when prompted.

For more information on inserting an image into the report, refer to the online Help documentation for Access.

4 Beyond the Basics

Inserting Text

Text can be inserted into a report by an Advanced User. You may insert text only in the following sections of a report:

- Page Header
- Detail
- Page Footer

When placing text into the report, follow these guidelines:

- ☐ The text must not be closer than 1/2 in. above or below the OMR mark on the 5 Series report.
- ☐ The text must not be closer than 1/8 in. to the left or right of the OMR mark on the 5 Series report.
- ☐ The text cannot cover the POSTNET barcode in the Page Header section of the report.
- ☐ The work may be too involved, requiring a Pitney Bowes Systems Engineer to perform it.



NOTE: If you place text in the Detail section of a report, the it will be repeated along with every line of detail. We recommend not placing text in the Detail section at all.

To place text into a report:

1. With the PB FIRST main menu displayed, press **F11** on your keyboard to display the Database window (Figure 4-9).
2. Click **Reports** in the left panel. The report objects appear in the right frame of the window.
3. Select the desired report, then click **Design** on the toolbar.
4. In Design View mode, navigate to the section of the report where you want to place the text (Page Header, Detail, Page Footer), then click the section bar for that section (Figure 4-10).
5. Click **View > Toolbars > Toolbox** in the Access menu bar to display the toolbox.
6. Click the text box tool (see sidebar), draw a text box within the section, and type in the desired text.
7. Close the report. Save your design changes when prompted.

For more information on inserting text into the report, refer to the online Help documentation for Access.



Text box tool in
Design View mode

Job Splitting Among Multiple Printers (Load Balancing)

PB FIRST™ supports splitting a job among multiple printers. (This is also known as load balancing or load balanced printing.) You must be logged on as an Advanced User to use enable this option.

To enable job splitting:

1. Click **Setup** in the PB FIRST main menu to display the Advanced User Setup dialog box.
2. Click **Project Options** in the left panel.
3. Select the **Normal** or **Overcount** checkbox (or both), to job split normal items, overcount items, or both.
4. Click **Apply**, then **Done**, to return to the main menu.

Prior to printing, the system will display a dialog box (Figure 4-11) that allows you to split the job by pieces or by trays among up to eight printers. You may split by trays only presorted jobs for which you've assigned tray numbers.



NOTE: If you select or clear this option in Advanced User Setup after importing, you must re-import the input file for the change to take effect.

Printer #	From	To	Printer Destination
1	1	334	
2	335	668	
3	669	1003	
4	0	0	
5	0	0	
6	0	0	
7	0	0	
8	0	0	

Figure 4-11
Splitting the print job among multiple printers

As of PB FIRST version 11.03, when you enable job

4 Beyond the Basics

Job Splitting Among Multiple Printers (Load Balancing)

splitting among multiple printers, this activates the Load Balanced Printing dialog box from ANY printing point in PB FIRST — even when printing from the Browse Addresses dialog box.

A convenient new feature it that PB FIRST remembers the last setting used in the Load Balanced Printing dialog box. This eliminates repetitive selection of printer options. If the input file has been changed and it does not have the same number of documents, the system remembers the number of printers used the last time and divides the number of documents equally among the printers from the last run. The system also validates the existence of printers used last. If a printer has been removed, the system displays an error message and disregards the last settings.

Move Update (VeriMove™ Net)

The United States Postal Service maintains a National Change of Address (NCOA) database of individuals and companies who have notified the post office of their change of address. This database was enhanced and is now called NCOALink™.

Pitney Bowes VeriMove™ Net is a service licensed by the USPS to update mailing lists with addresses from the NCOALink™ database. This enables you to meet the First-Class Mail Move Update requirement in Classification Reform announced in 1996. PB FIRST allows customers to access VeriMove directly from the PB FIRST main menu by simply clicking on the **Move Update** button.



NOTE: PB FIRST's integration with VeriMove Net is done entirely through SmartMailer. VeriMove must be included in your SmartMailer configuration in order for PB FIRST to interface with this option.

As a PB FIRST customer, you may apply for VeriMove Net. For more information, go to the following Pitney Bowes web page:

www.g1.com/link/moveupdate

After you've obtained general information about VeriMove Net, you may download an information packet. Complete instructions including where to send completed paperwork will be part of the download in the Registration for VeriMove™ Net Processing document. A sample fax cover page is also made available for downloading.

PB FIRST also allows you to generate a report of all changes that postal coding and/or VeriMove™ Net have made to your address list.

4 Beyond the Basics

OMR Support

One of the most important features of PB FIRST is its ability to generate OMR marks (Optical Mark Recognition) that can be read by these Pitney Bowes inserting systems:

- OfficeRight™ DI350 / FastPac™ DI400 / 3 Series™
- 4 Series™
- FastPac™ DI800 / 5 Series™
- FastPac™ DI800 / 5 Series™ ProPack (Production Package)
- FastPac™ DI500/DI600
- FastPac™ DI900/DI950

The printing of OMR marks on PB FIRST report pages and their subsequent scanning by the tabletop inserter results in greatly increased mailpiece integrity and an extremely low possibility of the wrong sheets being inserted into an envelope.

These marks are generated based on data entered by your Pitney Bowes Systems Engineer (PBSE) during PB FIRST installation and initial setup. The PBSE determines your report requirements and creates the necessary PB FIRST OMR jobs for you. Each job will have its own PB FIRST desktop icon (shortcut).

To run an OMR job:

- Double-click the **PB FIRST** desktop shortcut created for it by your PBSE and proceed with the job.

Overcount Group Splitting



NOTE: This option is NOT available for the job type **Env** (envelope printing).

Overcount group splitting allows you to split groups of overcount items for the same recipient into multiple envelopes in order to minimize the number of envelopes that must be processed manually.

When a PB FIRST job has this option enabled, a limit is set on the size of a group to be split. This prevents a very large group from being split into dozens of envelopes.

The import process keeps the split groups together at the end of the address list.

During PB FIRST installation and initial setup, your Pitney Bowes Systems Engineer (PBSE) works with you to determine your requirements and creates the necessary PB FIRST jobs with grouping and overcount group splitting enabled. Each job will have its own PB FIRST desktop icon (shortcut).

To run an overcount group splitting job:

- Double-click the **PB FIRST** desktop shortcut created for it by your PBSE and proceed with the job.

To change the overcount group splitting page limit:

1. Click **Setup** in the PB FIRST main menu to display the Advanced User Setup dialog box.
2. Click **Job Options** in the left panel menu.
3. In the number list for Maximum Number of Pages per Overcount Group Splitting, select the desired number. *Refer to Table 4-1 on the next page for the proper settings.*
 - If the number of pages for a group is less than or equal to the maximum number you select in step 3, the group will be split into smaller groups that will fit into the number you specify in the option Maximum Number of Pages per Mailpiece.
 - If the number of pages for a group is greater than the maximum number you select in step 3, *the group is not split.*
4. Click **Apply**, then **Done**, to return to the main menu.



NOTE: If you select or clear this option in Advanced User Setup after importing, you must re-import the input file for the change to take effect.

4 Beyond the Basics

Overcount Group Splitting

To disable overcount group splitting:

1. Click **Setup** in the PB FIRST main menu to display the Advanced User Setup dialog box.
2. Click **Job Options** in the left panel menu.
3. Set to **0** (zero) the number box for Maximum Number of Pages per Overcount Group Splitting in Job Options of Advanced User Setup.
4. Click **Apply**, then **Done**, to return to the main menu.

Table 4-1 Settings for Maximum Number of Pages		
Hardware	Type of Job	Max. Pages
DocuMatch DC115	simplex	4
DocuMatch DC115	duplex	8
3 Series OfficeRight DI350 FastPac DI400	simplex	5
3 Series OfficeRight DI350 FastPac DI400	duplex	10
5 Series FastPac DI800	simplex	6
5 Series FastPac DI800	duplex	12
FastPac DI500/DI600	simplex single-fold	5
FastPac DI500/DI600	duplex single-fold	10
FastPac DI500/DI600	simplex C-, Z-, double-fold	3
FastPac DI500/DI600	duplex C-, Z-, double-fold	6
FastPac DI900/DI950	simplex C-, Z-fold	8
FastPac DI900/DI950	duplex C-, Z-fold	16

PDF-to-Text Conversion for Importing

PB FIRST version 11.03 (and forward) supports importing from Portable Document Format (PDF) files. This functionality extends the number of applications that can be integrated with PB FIRST.

This optional feature is configured by your Pitney Bowes System Engineer (PBSE) per your sales agreement. The PDF file is imported, converted to text, and configured by your PBSE so it can be processed by PB FIRST.

To run PDF file importing job:

- Double-click the **PB FIRST** desktop shortcut created for it by your PBSE and proceed with the job.

4 Beyond the Basics

Presort Rejects Printed with Mail Job

Presort rejects, also known as non-qualifying addresses, are any mailpieces that could not be included in the presort discounted mailing by SmartMailer™. Normally these pieces are printed separately during a PB FIRST mail job by clicking on the Print Presort Rejects button on the main menu.

As of PB FIRST version 11.03, you can print presort rejects together with the successfully presorted pieces in your mail job by selecting the Processing Non-qualifying Addresses option in the Mailing Options screen in the SmartMailer Setup Wizard.

The presort rejects will be included only if:

- Street and City fields contain information.
- State field contains a valid state abbreviation.

To set up printing of presort rejects within your mail job:

1. Click **Setup** in the PB FIRST main menu.
2. Click **Postal Code** in the left panel Options menu.
3. Click the **Presort Setup** button to display the SmartMailer Presort Setup dialog box.
4. Click **Mailing Options** in the left panel Setup Tasks menu.
5. In the Reject Processing section, select the radio button **Addresses with Street, City, State Information**.
6. Configure any remaining SmartMailer options, as desired.
7. Click **Finish** to return to PB FIRST Advanced User Setup.
8. Click **Done**.

Presort Results Display Option

As of version 12.01, PB FIRST allows you to review presort results after the presort is completed, showing the costs savings of the presort.

To enable the option to review presort results:

1. Click **Setup** in the PB FIRST main menu to display the Advanced User Setup dialog box.
2. Click **Postal Code** in the left panel to display Postal Code options.
3. Select the checkbox **Display Presort Result Dialog**.
4. Click **Done**.

During PB FIRST mail job processing, the presort results are displayed in the Presort Finished dialog box (Figure 4-12) after presorting is complete and before you are prompted to print presort reports.

Presort Finished [X]

Presort has finished sorting your mail list

Mail List Statistics

Total number of addresses in the mail list (DBF)	986
Total number of addresses in the mailing (SRT)	963
Qualifying (discounted) addresses	963
Non-qualifying (full rate) addresses	0
Total number of addresses NOT in the mailing (REJ)	23

Postage Statistics

Qualifying addresses	\$281.33
Non-qualifying addresses in mailing (full rate)	\$0.00
Postage due for mailing	\$13.62
Postage saved by presorting your mail list	\$74.98

Processing Non-qualifying Addresses

Include the following non-qualifying addresses in the mailing at the full rate:

☒ Do not include non-qualifying addresses
☐ Addresses with Street, City, State information
 (the fields are not blank)

OK

Figure 4-12
Presort results are displayed after presorting is complete.

4 Beyond the Basics

Tray Switching on the DocuMatch and Other PCL-Compatible Printers

PB FIRST supports printing from multiple trays on the DocuMatch DC115 (or other PCL-compatible printers) in the same report or print job. This can be used for printing the first page of a document on company letterhead and subsequent pages on plain paper, and for other installations that require different paper stock to be used in different parts of the report.

PB FIRST also supports tray switching with job splitting among multiple printers (load balanced printing) as well as tray switching with job splitting and duplexing.

During installation and setup, your Pitney Bowes Systems Engineer (PBSE) determines your requirements and sets up the necessary PB FIRST tray switching applications (if any) for you.

To run a tray switching job:

- Double-click on the **PB FIRST** desktop shortcut created for it and proceed with the job.



Chapter 5

Check Printing

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5 Check Printing

About PB FIRST Check Printing

PB FIRST™ supports check printing on a laser printer and on DocuMatch® DC115 (Lexmark™ printer version). This optional feature is configured by your Pitney Bowes Systems Engineer (PBSE) during installation and initial setup of PB FIRST, per your sales agreement.

Essentially, PB FIRST imports the desired file and reformats it for check printing, including the signature and MICR line.

The checks are printed on business forms (check stock) specially formatted for check printing. These forms may be any check stock compliant with the laser printer being used. If printing on a DocuMatch DC115, any check stock that meets DocuMatch DC115 specifications is acceptable. You may also order additional check stock directly from the Pitney Bowes Supply Line at www.pb.com/supplies

MICR toner should be used for check printing jobs, since normal toner lacks the proper magnetic characteristics required for automated processing by the bank. (Check with your bank for more details.) The Pitney Bowes Supply Line carries replacement MICR toner for DocuMatch DC115 check printing only.

During the check printing job, PB FIRST instructs the laser printer to print the necessary information on each check form:

- Account name, address, logo
- Bank name, address, routing number, logo
- Payee name, address
- Payment amount
- MICR characters
- Signature(s)
- Other information, as desired (for example, remittance advice indicating which invoices are being paid).

Overview of Check Printing Features

PB FIRST check printing allows you to:

- Assign privileges for user security;
- Maintain a log of all user activity for each check printing project;
- Maintain a check print log;
- Safeguard check data from viewing and modification;
- Encrypt an unlimited number of signatures (maximum of two encrypted signatures per account);
- Manage multiple checking accounts;
- Create an output file for Positive Pay services offered by financial institutions.

These features are available only when your PBSE configures PB FIRST for check printing at the time of installation and setup, per your sales agreement.

In Chapter 2 you were introduced to the PB FIRST main menu. With the check printing feature enabled, the PB FIRST main menu displays a button labeled Utilities (Figure 5-1).

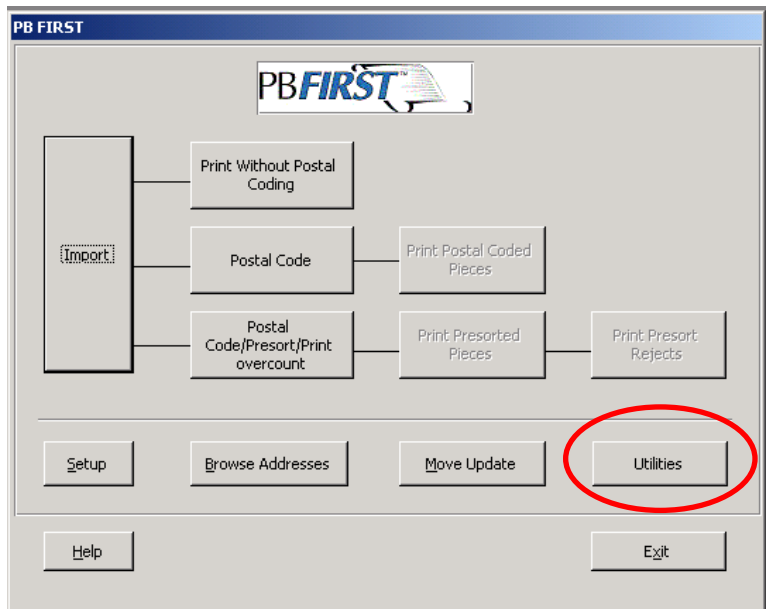


Figure 5-1

When check printing has been enabled during installation and setup, the main menu displays the Utilities button (circled).

5 Check Printing

Running a Check Printing Job

Before You Begin

Before running a check printing job, review this checklist of preliminary steps:

- ☐ Load the laser printer with enough check forms for the job.
- ☐ Make sure MICR toner has been installed in the laser printer.
- ☐ If your signatures are stored on one or more removable disks, retrieve the disk(s) from its secure location and have it ready to insert into its disk drive when prompted by PB FIRST during the check printing job.

Running the Job



NOTE: As of version 12.01, PB FIRST reminds you to load MICR toner into your printer before check printing begins.

To run a PB FIRST check printing job:

1. Launch PB FIRST by double-clicking on the PB FIRST desktop shortcut set up by your PBSE for that check printing job.
2. Click **Import** in the PB FIRST main menu.
3. When importing is complete, click the desired print option on the main menu.
4. Follow the prompts to complete the print job. During this process, the system will prompt you to insert the removable disk containing the encrypted signature(s) (Figure 5-2).

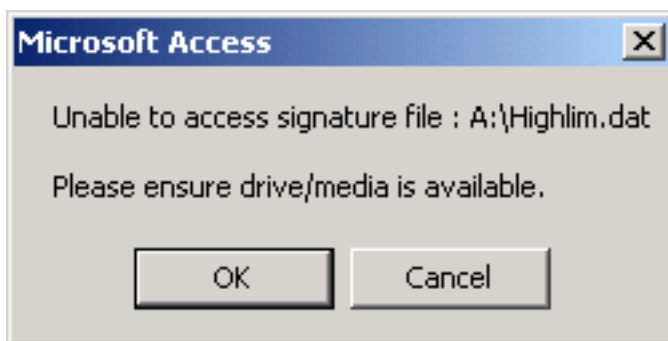


Figure 5-2
The system prompts you to insert the removable disk containing the encrypted signature.



NOTE: As an added security precaution, please keep your MICR toner and removable disk in a locked storage area when not in use.

5. When the print job is done, examine the checks and review/verify the check log data.

User Privileges for Check Printing

In Chapter 2, you learned that there are two basic levels of PB FIRST user access, User and Advanced User. With the check printing feature enabled, there are two additional levels of user access with privileges unique to running a check printing job:

- **Checking Admin1, Checking Admin2**
(coequal in privilege)
- **User1 through User8**
(privileges for each are defined and managed by the Checking Admin)



NOTE: User1–User8 do not have the privilege to run a check printing job using load balanced printing (See Job Splitting Among Multiple Printers, Chapter 4). If such a job is required, it must be run by a Checking Admin1 or Checking Admin2.

Checking Admins are authorized to run check printing jobs, manage logs, manage privileges, encrypt signatures, and manage accounts. User1 through User8 privileges are limited to running check printing jobs and managing logs.

Your Pitney Bowes Systems Engineer sets up your check printing user privileges during installation. The PBSE also sets up your passwords and shows you how to change them. Each Checking Admin and User1–User8 has the privilege of changing their own password.

The Checking Admin manages the check printing privileges for User1 through User8 in the following manner:

1. Click **Utilities** in the PB FIRST main menu.
2. Click **Manage Privileges** in the Utilities dialog box (Figure 5-3).

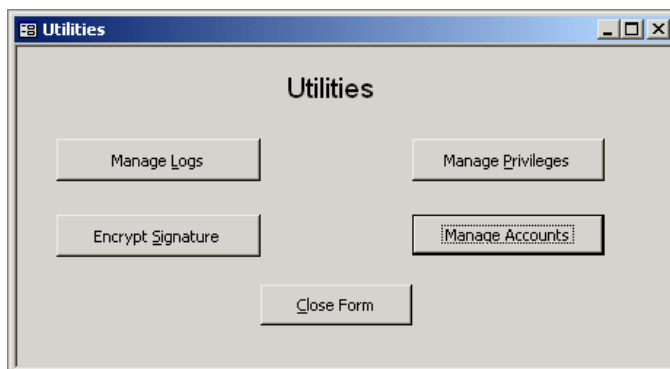


Figure 5-3
The Utilities dialog box provides access to a number of functions related to check printing.

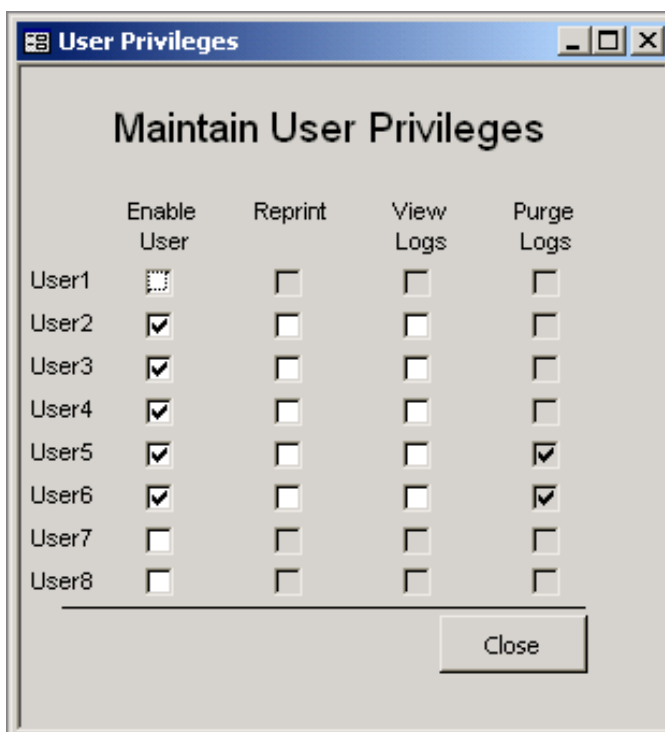


NOTE: Please remember your password! If you forget it, you must phone the Pitney Bowes Tech Support Center to have the PB FIRST administrator reset it!

5 Check Printing

User Privileges for Check Printing

3. In the User Privileges dialog box (Figure 5-4), select or deselect the desired options:
 - Enable or disable a user
 - Allow or disallow a user to reprint checks.
 - Allow or disallow a user to view the Activity Log and Check Print Log
 - Allow or disallow a user to purge information from the Activity Log or Check Print Log



The dialog box is titled "User Privileges" and contains a section titled "Maintain User Privileges". It features a table with four columns: "Enable User", "Reprint", "View Logs", and "Purge Logs". The table lists eight users, from User1 to User8. Each user has a set of checkboxes corresponding to the four privilege categories. A "Close" button is located at the bottom right of the dialog box.

	Enable User	Reprint	View Logs	Purge Logs
User1	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
User2	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
User3	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
User4	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
User5	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
User6	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
User7	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
User8	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Close

Figure 5-4
Selecting the check printing privileges for each user.

4. Click **Close**, then **Close Form**, to return to the main menu.

MICR Toner Reminder

Before any printing has taken place for a check printing job, PB FIRST can remind you to change your printer toner to MICR toner. This reduces the chance that checks printed will be rejected by the bank's check processing equipment, which may expose you to large fees.

To enable the MICR toner reminder option:

1. Click **Setup** in the PB FIRST main menu to display the Advanced User Setup dialog box.
2. Click **Main Setup** in the left panel menu to display the Configuration dialog box.
3. Click **Project Setup** in the left panel menu to display Project Setup options (Figure 5-5).
4. Select the checkbox **Remind for MICR Toner Check Before Printing Starts**.
5. Click **Done**.

When the check printing job is run, the MICR Toner Check dialog box is automatically displayed just prior to printing (Figure 5-6).

Figure 5-5
Enabling the MICR toner reminder

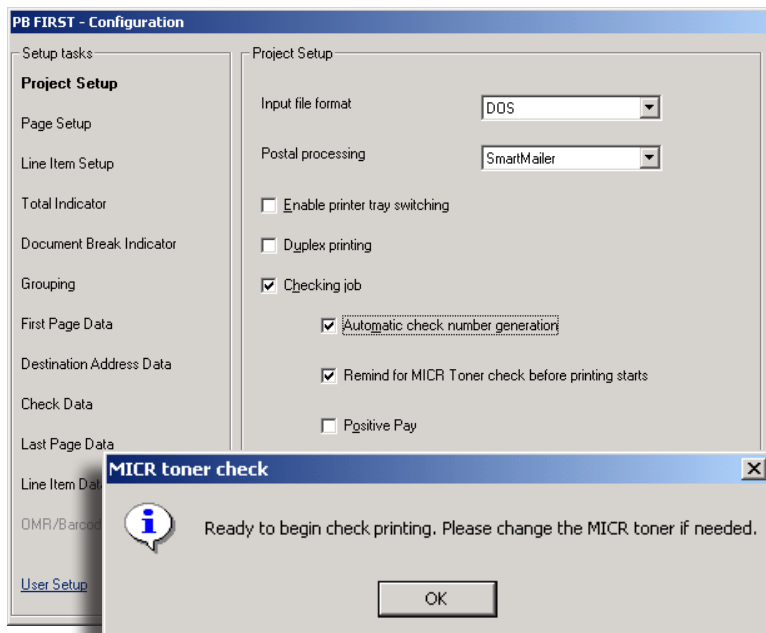
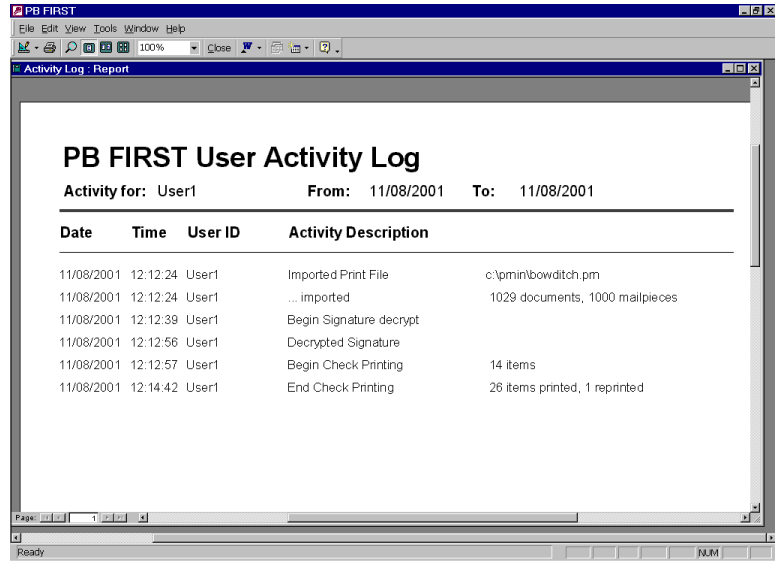


Figure 5-6
MICR Toner Check dialog box

5 Check Printing

Activity Log

PB FIRST maintains a persistent log of all user activity for each check printing project. Users with sufficient privileges can preview or print this Activity Log as a report, filtered by date and user (Figure 5-7).



Date	Time	User ID	Activity Description
11/08/2001	12:12:24	User1	Imported Print File c:\pmin\bowditch.pm
11/08/2001	12:12:24	User1	... imported 1029 documents, 1000 mailpieces
11/08/2001	12:12:39	User1	Begin Signature decrypt
11/08/2001	12:12:56	User1	Decrypted Signature
11/08/2001	12:12:57	User1	Begin Check Printing 14 items
11/08/2001	12:14:42	User1	End Check Printing 26 items printed, 1 reprinted

Figure 5-7
You can preview the Activity Log on-screen or print out a copy.

The report includes a subtitle that indicates the parameters used to generate the report (for example, the date range and activity for a specific user or all users). The first and each subsequent page of the report includes a header row for the log data: Date, Time, User ID, Activity Description. The footer includes the page number and the date/time the Activity Log report was generated.

Activity Log

The Activity Description field includes entries for the following actions:

- Imported Print File
- Postal Coded Data
- Presorted Data
- Decrypted Signature
- Encrypted Signature
- Begin Signature Decrypt
- Invalid Password Entered
- Purged Activity Log
- Check Print Log
- Positive Pay Export
- Privileges Updated
- Begin Check Printing
- End Check Printing

Viewing or Printing the Activity Log

To view or print the Activity Log:

1. Click **Utilities** in the PB FIRST main menu.
2. Click **Manage Logs** in the Utilities dialog box.
3. In the Manage Logs dialog box (Figure 5-8), select **Activity Log**, then click **View/Print**.

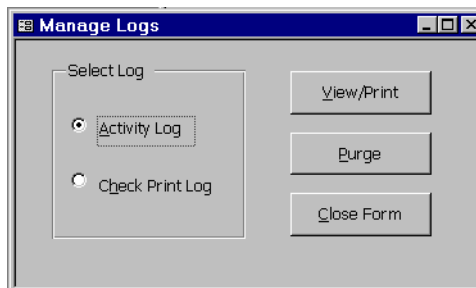


Figure 5-8
Selecting a log for viewing/printing or purging.

5 Check Printing

Activity Log

Viewing or Printing the Activity Log

4. In the Activity Log Report dialog box (Figure 5-9), you may filter entries in the log as you wish.
 - a. Type the activity date range in the fields provided.
 - b. Select **All Users** or a specific user from the drop down box.
 - c. Select the option to either **Print** or **View** the report.

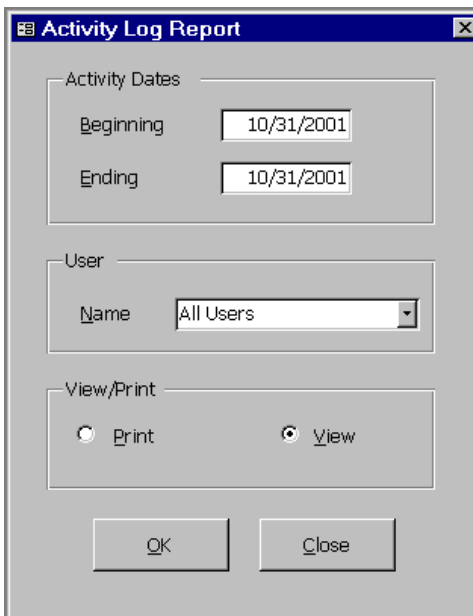
The image shows a Windows-style dialog box titled "Activity Log Report". It contains three main sections. The first section, "Activity Dates", has two text boxes: "Beginning" with the date "10/31/2001" and "Ending" with the date "10/31/2001". The second section, "User", has a label "Name" and a dropdown menu currently showing "All Users". The third section, "View/Print", has two radio buttons: "Print" (which is unselected) and "View" (which is selected). At the bottom of the dialog are two buttons: "OK" and "Close".

Figure 5-9
Filtering the entries for the Activity Log report.

5. Click **OK**.

Activity Log

Purging Information from the Activity Log

As the number of records in the log surpasses 5,000, PB FIRST displays the following message upon importing:

The Activity Log is nearing its maximum size. Older entries in the Activity Log should be reviewed and purged by a user who has sufficient privileges.

In all cases, you are allowed to continue and all activity continues to be logged.

In the Purge Activity Log dialog box (Figure 5-10), users with sufficient privileges can purge activity from the log that occurred prior to some date specified by the user.

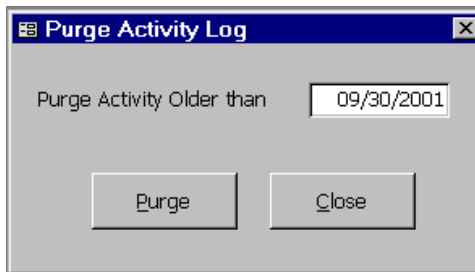


Figure 5-10
Purging activity prior to some specified date.



NOTE: If you want to purge all the entries in the log, type in a date later than today's date.

To purge information from the Activity Log:

1. Click **Utilities** in the PB FIRST main menu.
2. Click **Manage Logs** in the Utilities dialog box.
3. In the Manage Logs dialog box, select **Activity Log**, then click on **Purge**.
4. In the Purge Activity Log dialog box, type the date in the field provided.
5. Click **Purge**.

Check Print Log

The Check Print Log is a persistent log of all check printing activity, showing the check number, account ID, check amount, and a count showing the number of times each check was printed along with the name of the user who printed the check (or imported the check into PB FIRST). Users with sufficient privileges can use this log to audit check printing activity and to help detect errors or fraud due to multiple prints of checks. This log can be previewed or printed as a report (Figure 5-11).

Check Print Log

All Checks All Print Counts

Account ID	Check Number	Payee	Net Check Amount	Print Count	User
n	10001	Mr. Sample001 Person001	1.01	0	jhadmin
n	10003	Ms. Sample003 Person003	3.03	0	jhadmin
n	10006	Mrs. Sample006 Person006	6.06	0	jhadmin
n	10008	Mrs. Sample008 Person008	8.08	0	jhadmin
n	10009	Ms. Sample009 Person009	9.09	0	jhadmin
n	10011	Mr. Sample011 Person011	11.11	0	jhadmin
n	10014	Mr. Sample014 Person014	14.14	0	jhadmin
n	10015	Ms. Sample015 Person015	15.15	0	jhadmin
n	10018	Ms. Sample018 Person018	18.18	0	jhadmin
n	10019	Mr. Sample019 Person019	19.19	0	jhadmin
n	10020	Ms. Sample020 Person020	20.20	0	jhadmin
n	10023	Mrs. Sample023 Person023	23.23	0	jhadmin
n	10025	Mr. Sample025 Person025	25.25	0	jhadmin
n	10026	Mr. Sample026 Person026	26.26	0	jhadmin

Page: 1 Ready

Figure 5-11
You can preview the Check Print Log on-screen or print out a copy.

The log is populated when a file is imported. PB FIRST checks to see if an entry for the check number already exists in the log, and if not, it adds a new entry.

When a check is printed, PB FIRST again checks the log to see if there is an entry for the check number. If PB FIRST finds the entry, it increments the print count for that check. If it does not find the entry, it displays an error message.

The report includes a subtitle that indicates the parameters used to generate the report. The first and each subsequent

Check Print Log

page of the report includes a header row for the log data. The footer includes the page number as well as the date and time the report was generated.

Viewing or Printing the Check Print Log

Users with sufficient privileges can view or print the Check Print Log as a report.

To view or print the Check Print Log:

1. Click **Utilities** in the PB FIRST main menu.
2. Click **Manage Logs** in the Utilities dialog box.
3. In the Manage Logs dialog box (Figure 5-12), select **Check Print Log**, then click **View/Print**.

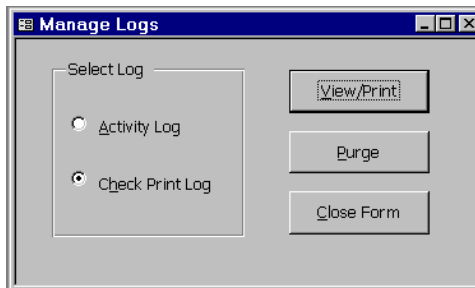


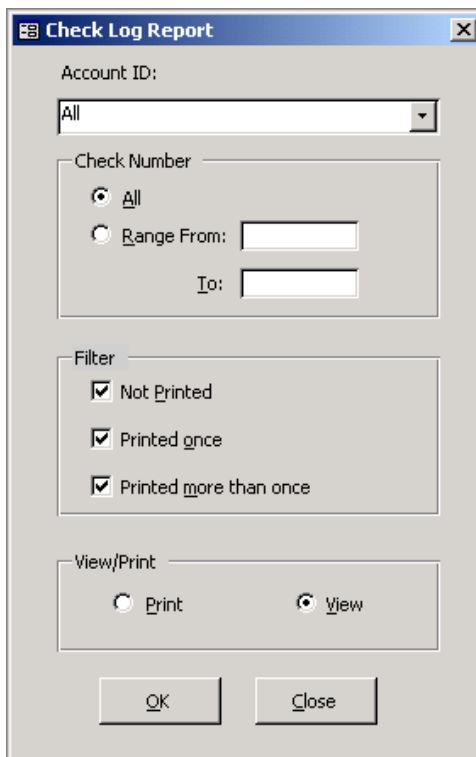
Figure 5-12
Selecting the Check Print Log for viewing/printing or purging.

5 Check Printing

Check Print Log

Viewing or Printing the Check Print Log

4. In the Check Log Report dialog box (Figure 5-13), you may filter entries in the log as you wish.
 - a. Select an **Account ID** or **All**.
 - b. Select a **Check Number** option for either all checks or a range of checks.
 - c. Select a **Filter** option.
 - d. Select the option to either **Print** or **View** the report.



The image shows a Windows-style dialog box titled "Check Log Report". It contains several sections for filtering data. The "Account ID" section has a dropdown menu currently set to "All". The "Check Number" section has two radio buttons: "All" (which is selected) and "Range From:" followed by two empty text boxes labeled "From:" and "To:". The "Filter" section has three checked checkboxes: "Not Printed", "Printed once", and "Printed more than once". The "View/Print" section has two radio buttons: "Print" and "View" (which is selected). At the bottom are "OK" and "Close" buttons.

Figure 5-13
Filtering the entries for the Check Print Log report.

5. Click **OK**.

Check Print Log

Purging Printed Checks

As the number of records in the log surpasses 100,000, PB FIRST displays the following message upon importing:

The Check Print Log is nearing its maximum size. Older entries in the Check Print Log should be reviewed and purged by a user who has sufficient privileges.

In all cases, you are allowed to continue and all checks continue to be logged.

Users with sufficient privileges can purge printed checks from the log in the Purge Check Print Log window. They may specify All Checks, or a range of check numbers.

To purge printed checks from the Check Print Log:

1. Click **Utilities** in the PB FIRST main menu.
2. Click **Manage Logs** in the Utilities dialog box.
3. In the Manage Logs dialog box, select **Check Printing**, then click **Purge**.
4. In the Purge Check Print Log dialog box (Figure 5-14), select an **Account ID** or **All**, then select the option for either **All Checks** or a range of checks **By Check No.** If a range of checks, type the check number range in the fields provided.
5. Click **Purge**.

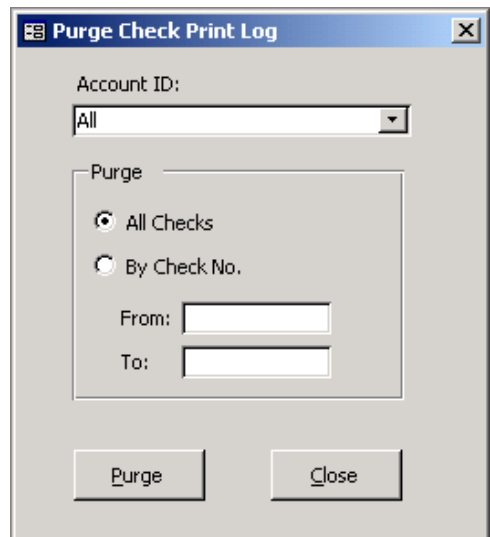


Figure 5-14
Purging printed checks from the Check Print Log.

Signature Encryption

A Checking Admin user who knows the encryption password can encrypt an unlimited number of signatures (graphic image files of signatures) for each check printing project. You can specify a maximum of two signatures per account.

During PB FIRST installation and initial setup, your Pitney Bowes Systems Engineer will set up your encryption password and provide it to one or both Checking Admin users. Before encrypting a graphic image file of a signature, PB FIRST prompts the Checking Admin for the encryption password.



NOTE: In PB FIRST versions prior to 11.01, if multiple signatures are required, they all must be stored together on the same removable disk.

Your PBSE can also configure your check layouts to support special signatures based upon the check amount. For example, if a check is above a certain dollar amount, a particular signature or perhaps multiple signatures can be printed.

To encrypt a graphic image file of a signature:

1. Click **Utilities** in the PB FIRST main menu.
2. Click **Encrypt Signature** in the Utilities dialog box (Figure 5-3, page 5-6).
3. In the Enter Password dialog box (Figure 5-15), type in the encryption password and click **OK**.



NOTE: Please remember your encryption password! If you forget it, you must contact the Pitney Bowes Tech Support Center to have the PB FIRST administrator reset it!



Figure 5-15
Entering the encryption password.

Signature Encryption



NOTE: For security, the output file for the encrypted signature should be stored on a removable disk (not on the computer's hard drive) so it can be locked in a secure location when not in use.

4. In the Encrypt Signature dialog box (Figure 5-16):
 - a. Click the upper **Browse** button to navigate to the desired signature file to be encrypted, then select the file. (The file should be on a removable disk such as a floppy disk [drive A], not on the hard drive.) The path and file name appear in the field provided.
 - b. Click the lower **Browse** button to navigate to the desired location for storing the encrypted signature. The encrypted file will be:

input file name.dat

The path appears in the field provided.

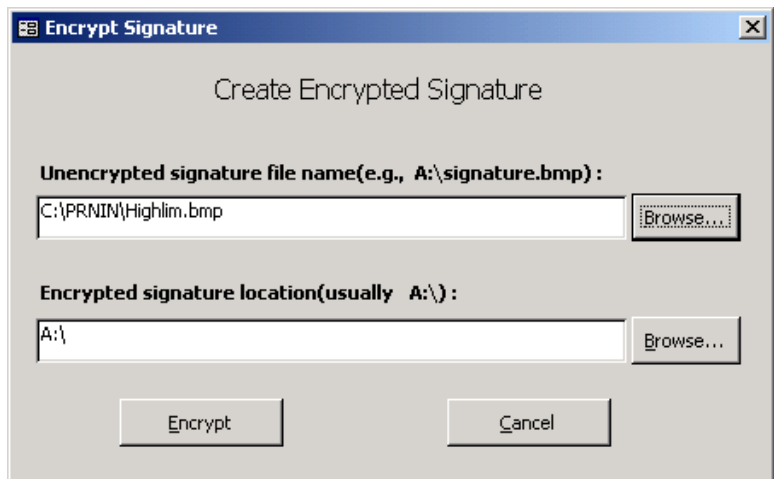


Figure 5-16
Encrypt Signature dialog box

- c. Click the **Encrypt** button.
 - d. When the signature has been encrypted (Figure 5-17), click **OK**.



Figure 5-17

5 Check Printing

Managing Multiple Accounts

Creating a New Account

PB FIRST™ version 11.01 supports multiple accounts for check printing. Your Pitney Bowes Systems Engineer (PBSE) sets up your check printing user privileges during installation. Users with Checking Admin privileges are authorized to manage multiple checking accounts through the Manage Accounts dialog box.

To create a new account for check printing:

1. Click **Utilities** in the PB FIRST main menu.
2. Click **Manage Accounts** in the Utilities dialog box. The Manage Accounts dialog box appears (Figure 5-18).

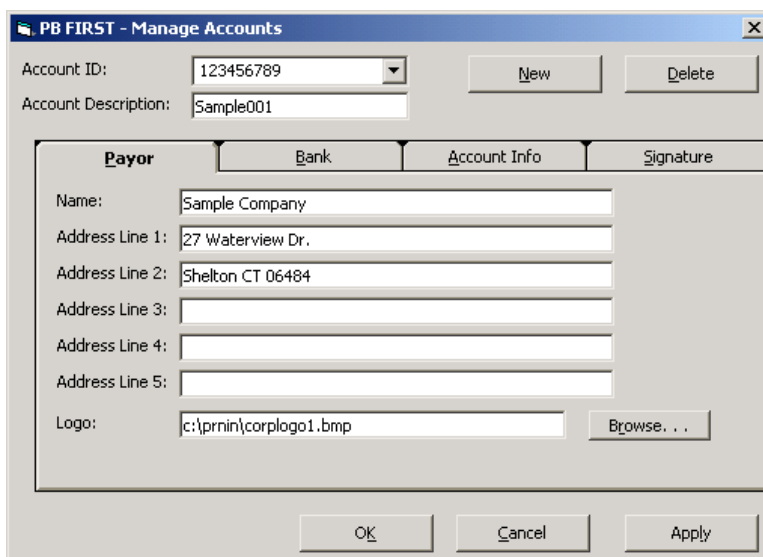
The image shows a screenshot of the 'PB FIRST - Manage Accounts' dialog box, specifically the 'Payor' tab. The dialog box has a title bar with the text 'PB FIRST - Manage Accounts' and a close button. Below the title bar, there are two input fields: 'Account ID:' with a dropdown menu showing '123456789' and a 'New' button to its right; and 'Account Description:' with a text box containing 'Sample001' and a 'Delete' button to its right. Below these fields is a tabbed interface with four tabs: 'Payor' (selected), 'Bank', 'Account Info', and 'Signature'. The 'Payor' tab contains several input fields: 'Name:' with 'Sample Company', 'Address Line 1:' with '27 Waterview Dr.', 'Address Line 2:' with 'Shelton CT 06484', and three empty 'Address Line 3:', 'Address Line 4:', and 'Address Line 5:' fields. There is also a 'Logo:' field with the path 'c:\prnin\corplogo1.bmp' and a 'Browse...' button to its right. At the bottom of the dialog box are three buttons: 'OK', 'Cancel', and 'Apply'.

Figure 5-18
Payor tab of Manage Accounts dialog box

3. Click the **New** button.
4. In the Account ID field, type the account ID as specified in the input file to be imported for the check printing job. Depending on the format of your file, this may be the account number or it may be some other code.
5. Type an account name or description in the Account Description field.

Managing Multiple Accounts

6. Click the **Payor** tab (Figure 5-16).
 - a. Type the payor name and address, as they are to appear on the check, in the fields provided.
 - b. In the Logo field, enter the file path or use the **Browse** button to select the graphic image file for the payor logo that is to appear on the check.

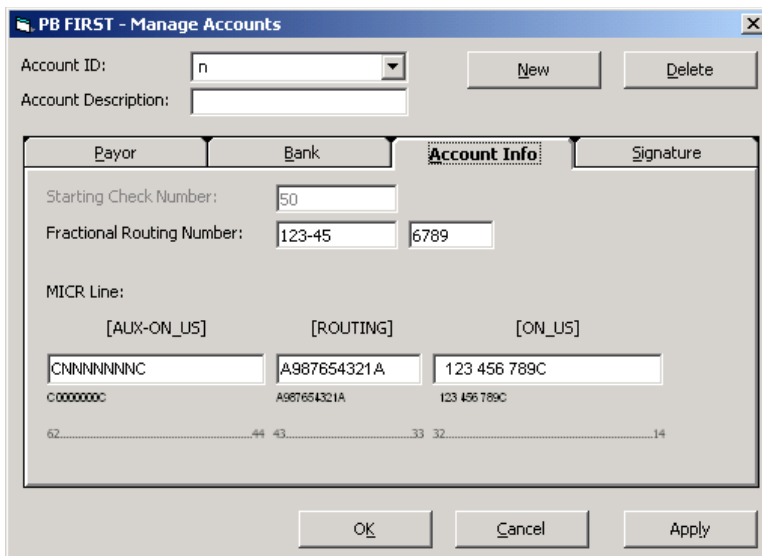
The screenshot shows the 'PB FIRST - Manage Accounts' dialog box with the 'Bank' tab selected. The 'Account ID' is 123456789 and the 'Account Description' is Sample001. The 'Bank' tab contains the following fields: 'Account Number' (1234567890), 'Name' (Sample Bank), 'Address Line 1' (35 Waterview Dr.), 'Address Line 2' (Shelton CT 06484), 'Address Line 3' (empty), 'Address Line 4' (empty), 'Address Line 5' (empty), and 'Logo' (c:\prnin\abank.bmp). There are 'New', 'Delete', 'Browse...', 'OK', 'Cancel', and 'Apply' buttons.

Figure 5-19
Bank tab of Manage Accounts dialog box

7. Click the **Bank** tab (Figure 5-19).
 - a. Type in the checking account number in the Bank field.
 - b. Type the bank name and address, as they are to appear on the check, in the fields provided.
 - c. In the Logo field, enter the file path or use the **Browse** button to select the graphic image file for the bank logo that is to appear on the check.

5 Check Printing

Managing Multiple Accounts



The image shows a screenshot of the 'PB FIRST - Manage Accounts' dialog box, specifically the 'Account Info' tab. The dialog box has a title bar with the text 'PB FIRST - Manage Accounts' and a close button. Below the title bar, there are two input fields: 'Account ID:' with a dropdown menu showing 'n', and 'Account Description:' with an empty text box. To the right of these fields are two buttons: 'New' and 'Delete'. Below these fields is a tabbed interface with four tabs: 'Payor', 'Bank', 'Account Info' (which is selected), and 'Signature'. The 'Account Info' tab contains several input fields: 'Starting Check Number:' with the value '50', 'Fractional Routing Number:' with the value '123-45' and a separate field for '6789', and 'MICR Line:' with three sub-fields: '[AUX-ON_US]' containing 'C00000000C', '[ROUTING]' containing 'A987654321A', and '[ON_US]' containing '123 456 789C'. Below these fields is a line of numbers: '62.....44 43.....33 32.....14'. At the bottom of the dialog box are three buttons: 'OK', 'Cancel', and 'Apply'.

Figure 5-20
Account Info tab of Manage Accounts dialog box

8. Click the **Account Info** tab (figure 5-20).
 - a. If your PBSE has NOT enabled auto check generation for your check printing jobs, type the appropriate check number in the Starting Check Number field.
 - b. In the Bank Fraction fields, type the numerator in the left field and the denominator in the right field. The valid characters for these fields are:
0 1 2 3 4 5 6 7 8 9 - /
 - c. In the MICR Line fields, type the appropriate information, *adhering to field locations and content as defined by your bank*. (Refer to Table 5-1 for more details.)

Managing Multiple Accounts

Table 5-1 Manage Accounts dialog box/Account Info tab MICR Line fields			
	AUX-ON_US	TRANSIT	ON_US
Purpose	Sequential check number	Bank routing number	Checking acct. number
ABA* positions	62.....44	43.....33	32.....14
Characters and Symbols	C = ON_US symbol	A = transit symbol	C = ON_US symbol
	D = dash	D = Dash	D = dash
	<sp> (space character)	(no spaces)	<sp> (space character)
	N = for each digit in check number		N = for each digit in account number
	0 through 9 for corresponding digits	0 through 9 for corresponding digits	0 through 9 for corresponding digits
Format	As defined by your bank	9 numeric + 2 transit symbols	As defined by your bank
Notes	Do NOT use position 44 (reserved for EPC field)	Routing number must be preceded and followed by transit symbol, e.g., A123456789A	May not contain more than 19 characters (digits, symbols, and spaces)
	May also contain accounting control info. specific to the account		ON_US symbol must always appear to the right of account number

* American Bankers Association

Managing Multiple Accounts

The screenshot shows the 'PB FIRST - Manage Accounts' dialog box with the 'Signature' tab selected. The 'Account ID' is 123456789 and the 'Account Description' is Sample001. The 'Warn for undefined signatures' checkbox is checked. The 'Include signature 1 when check amount is:' section shows 'Greater than or equal to:' as 0 and 'but less than:' as 5000. The 'Signature 1' field contains 'C:\PRNIN\void1.dat'. The 'Include signature 2 when check amount is:' section shows 'Greater than or equal to:' as 5000 and 'but less than:' as 100000. The 'Signature 2' field contains 'C:\PRNIN\HigherLimit.dat'. There are 'Browse...' buttons next to both signature fields. At the bottom, there is a 'Create Encrypted Signature...' button. The 'OK', 'Cancel', and 'Apply' buttons are at the bottom right.

Figure 5-21
Signature tab of Manage Accounts dialog box

9. Click the **Signature** tab (Figure 5-21).
 - a. Select the **Warn for Undefined Signatures** checkbox if you want the system to notify you when a required encrypted signature is not validated or available.
Clear the checkbox if you do not want this warning to display during Batch mode.
 - b. In the Include **Signature 1 When Check Amount Is** field:
 - Enter the minimum currency amount requiring Signature 1 in the **Greater Than or Equal to** field.
 - Enter the maximum + 1 currency amount requiring Signature 1 in the **But Less Than** field.
 - c. In the Signature 1 field, enter the file path or use the **Browse** button to select the .dat file for encrypted Signature 1.

Managing Multiple Accounts



NOTE: In step 9d, if your check printing job does not require a second signature, enter 0 (zero) in each field. Do NOT leave these two fields blank.

- d. In the **Include Signature 2 When Check Amount Is** field:
 - Enter the minimum currency amount requiring Signature 2 in the **Greater Than or Equal to** field.
 - Enter the maximum + 1 currency amount requiring Signature 2 in the **But Less Than** field.
 - e. In the Signature 2 field, enter the file path or use the **Browse** button to select the .dat file for encrypted Signature 2.
10. Click **Apply**, then click **OK** to save your new account.

Editing an Existing Account

To edit an existing account:

1. Click **Utilities** in the PB FIRST main menu.
2. Click **Manage Accounts** in the Utilities dialog box. The Manage Accounts dialog box appears (Figure 5-18).
3. In the Account ID field, select the desired account number.
4. Click each tab and make your desired changes.
5. Click **Apply**, then click **OK** to save your new settings.

Deleting an Existing Account

To delete an existing account:

1. Click **Utilities** in the PB FIRST main menu.
2. Click **Manage Accounts** in the Utilities dialog box. The Manage Accounts dialog box appears (Figure 5-18).
3. In the Account ID field, select the desired account number to be deleted.
4. Click the **Delete** button.
5. Answer **Yes** to the prompt *Are You Sure You Want to Delete Account?*

5 Check Printing

Automatic Check Number Generation

As of version 11.01, PB FIRST provides a new option for automatically generating check numbers.

During installation and initial setup, your Pitney Bowes Systems Engineer creates the required PB FIRST check printing applications for you. The PBSE enables or disables automatic check number generation as may be required for each job that is set up.

With this option enabled, you can input the starting check number in the appropriate field under the Account Info tab of the Manage Accounts dialog box (Figure 5-22) prior to each check printing job.

The image shows a screenshot of the 'PB FIRST - Manage Accounts' dialog box, specifically the 'Account Info' tab. The dialog box has a title bar with the text 'PB FIRST - Manage Accounts' and a close button. Below the title bar, there are two input fields: 'Account ID:' with a dropdown menu showing 'n', and 'Account Description:' with an empty text box. To the right of these fields are two buttons: 'New' and 'Delete'. Below these fields is a tabbed interface with four tabs: 'Payor', 'Bank', 'Account Info' (which is selected), and 'Signature'. The 'Account Info' tab contains several input fields: 'Starting Check Number:' with a text box containing '50', 'Fractional Routing Number:' with two text boxes containing '123-45' and '6789', and 'MICR Line:' with three text boxes containing 'C00000000C', 'A987654321A', and '123 456 789C'. Below these fields are three labels: '[AUX-ON_US]', '[ROUTING]', and '[ON_US]'. At the bottom of the dialog box are three buttons: 'OK', 'Cancel', and 'Apply'.

Figure 5-22
With automatic check number generation enabled, the Starting Check Number field is active. Enter the desired check number here during job setup.

Positive Pay

In an effort to provide additional control over check fraud, many banks support a service known as Positive Pay that uses their customer's issued check information as an authorization file. The file indicates which checks are valid issues by check number and amount. The bank matches presented items against issues to certify the validity of the item. If an item matches by the check number and amount, the bank will pay the item. Any items that do not match can be referred to the customer for review, who can then instruct the bank to either pay or return the item. Positive Pay also eliminates posting errors and the adjustments made to correct them.

The Positive Pay file contains information such as check number, date, amount, and payee. Banks have a variety of Positive Pay file formats, offering various services to their customers that utilize the Positive Pay information.

PB FIRST and Positive Pay

PB FIRST can create a file that supports Positive Pay services offered by financial institutions. However, PB FIRST does not handle the transfer of the Positive Pay file to the bank. The customer is responsible for e-mailing the file or transferring it using the mechanism provided by the bank.



NOTE: Presently, only one bank at a time can be used when running a PB FIRST job with the Positive Pay option. Therefore, check printing jobs using multiple accounts cannot be used with Positive Pay.

During PB FIRST installation and initial setup, your Pitney Bowes Systems Engineer configures your output file to the Positive Pay format required by your financial institution.

The Positive Pay file is created immediately after the PB FIRST import (that is, before checks have actually been printed), which would include all checks—including those that eventually wind up in the sorted file, rejects and overcounts. If a Positive Pay file already exists, that file is renamed as a backup file (for example, pospay.csv.bak), and the new file is created.

5 Check Printing

Positive Pay

PB FIRST and Positive Pay

Thereafter, if desired, an Advanced User is able to define the name and location of the Positive Pay file through the Advanced User Setup dialog box. The name and location of the file upon initial installation and test import is “positive.csv”, located in the PB FIRST install directory (for example, c:\prnin).



Chapter 6

Troubleshooting

6 Troubleshooting

Error Message/Problem	Possible Cause	Recommended Action
Can't find [path to file] to import - check file name setting in User Setup	File not in correct path.	Locate file and move to correct path.
	File has not been copied/downloaded to computer.	Copy or download file to computer.
	File name is different.	Go to Advanced User Setup - Job Type Options dialog box and enter correct file name.
	In networked installations, the file cannot be found because it exists on another computer, and a drive is no longer mapped, or it is mapped using a different drive letter.	Check your network configuration. Log in and/or remap drives as necessary.
Postal Coding failed - check that ZIP+4 data is present and has not expired	Postal Data (ZIP+4) CD not found.	Install ZIP+4 Postal Data CD and retry.
	Postal Data (ZIP+4) CD has expired.	Make sure you are using the ZIP+4 Postal Data CD that came with your most recent SmartMailer CD.
Can't find SmartMailer Postal coding module - Check SmartMailer directory setting in User Setup	SmartMailer is not installed.	Install or purchase Pitney Bowes SmartMailer software. To purchase SmartMailer, visit www.pitneybowes.com/us
Blank window appears when I click Browse Addresses or Overcount	No records are available for viewing at this time. (There are no overcount items in this mail job.)	Click on the X at the top right of the window to return to main menu.
Not enough pieces in list to qualify for Presort discount.	The mail job does not contain the required number of pieces to qualify for the discount.	Refer to Chapter 2 for minimum number of postal coded pieces required.
Partial document at end of file FileToImport.	The input file ended unexpectedly. The last document was more than one page but was incomplete.	Check that the input file is formatted correctly and not truncated.

Error Message/Problem	Possible Cause	Recommended Action
Document DOCNO in FileToImport is over [X] pages. Continue?	A document of over 20 pages was encountered.	Click Yes to continue.
	Problem with the job setup.	Contact your Pitney Bowes Systems Engineer.
	Problem with the input file	Check that the input file is in the same format as files that have imported correctly.
Address for document DOCNO in FileToImport is blank. Continue?	A blank address was detected. Usually caused by a bad import file.	Click Yes to accept the address and continue.
(Error Description) File Document Page Line Field.	Error was encountered at the indicated location while importing. Usually caused by a bad input file.	Contact your Pitney Bowes Systems Engineer.
Win98, DocuMatch driver not found.	Job is configured to run with a DocuMatch but driver for the printer is not installed.	Install the driver from your most recent DocuMatch CD.
DestAddr table not found – you must import before postal coding.	Attempting to postal code without any data.	Import the data file.
Can't find DBName.ini in SmartMailer LISTS directory.	Project was not installed correctly.	Contact your Pitney Bowes Systems Engineer.
Can't find SmartMailer presort module – check SmartMailer directory setting in User Setup.	Presort module could not be found.	Visit www.pitneybowes.com/us
Can't find file name to import.	SmartMailer did not finish postal coding or presorting.	Import the input file again and re-postal code.
Unable to start SmartMailer component.	A SmartMailer component did not start.	Check that SmartMailer runs OK by itself. Install or reinstall it if necessary.
Report text appears in only Courier (fixed pitch font).	Default printer set to Generic.	Set another printer as default.

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Chapter 7

Glossary

Glossary

Address Change Tracking

A feature that reports on SmartMailer™ changes to destination addresses, allowing you to accept or decline the changes.

Advanced User

User of PB FIRST™ who can also access the Advanced User Setup dialog boxes and place images.

ASCII Text File

(American Standard Code for Information Interchange) Used as the basic computer code in the U.S. for representing alphanumeric information for personal and workstation computers.

Barcodes

Dash lines scanned by FastPac DI800/5 Series with ProPack and DI900/DI950 inserters. The barcodes tell the system how to assemble a collation to ensure that all inserts intended for a single addressee are placed in the correct envelope.

Batch Mode

A feature that allows you to run a PB FIRST job with one mouse click.

CASS

(Coding Accuracy Support System) A USPS® program that validates and certifies the accuracy of address-matching software. It tests the ability of that software to accurately match address records to the USPS ZIP+4 database, and assign the correct five-digit, ZIP+4, or delivery point barcodes.

CRRT

(Carrier Route) The addresses to which a carrier delivers mail. In common usage, carrier route includes city routes, rural routes, highway contract routes, post office box sections, and general delivery units.

Glossary

Data File Importing

A feature that permits the importing of data files such as Excel, comma delimited, and Access, with one record or row per document. The data can be in any format that Microsoft® Access 2000 or Access XP can import.

DPBC

(Delivery Point Barcode) A two-digit add-on to the ZIP+4 Code which identifies the primary street number or box number of an address.

Duplex Printing

Printing on both sides of a sheet of paper.

Error Code

A code that is assigned to the records in your mail list file whenever an address is undeliverable or cannot be found.

ForwardTrak™ Net

Replaced by VeriMove™ Net (see VeriMove™ Net).

Grouping

Combining items for the same destination address and inserting them into one envelope. If total page count exceeds maximum, whole set prints as overcount items. (See also overcount group splitting.)

Importing

Bringing a file in from another location. For example, transferring (importing) print file data to PB FIRST.

JOB File

(.JOB File) DocuMatch® DC115 file that configures the machine to a certain PB FIRST job.

Mail Job

The process of generating a group of finished mailpieces. May include printing, collating, and insertion.

Mailpiece

Any envelope, post card or package to which postage has to be affixed.

Glossary

Main Menu

The main user interface that appears when you launch PB FIRST. It provides access to the most important and most frequently used functions.

MICR

(Magnetic Ink Character Recognition) Specially encoded characters printed with special ink or toner at the bottom of checks that identify the checking account number, bank transit number, and check number. They enable the bank's automated equipment to process checks quickly and cost-effectively.

NCOA

(National Change of Address) Database maintained by the USPS of individuals and companies who have notified the post office of their change of address.

Normal Items

Mailable items that can be processed through a FastPac™ DI800, 5 Series™, or DocuMatch DC115.

OEL

(Optional Endorsement Line) A series of specific characters on the top line of the address block that identifies the sortation level of a package or bundle and may contain an ACS participant code. The OEL is used in place of package labels.

OMR Marks

(Optical Mark Recognition) Dash lines scanned by OfficeRight™ DI350, FastPac DI400, DI800, DI500/DI600, and 5 Series/3 Series™ inserters. The OMR code tells the system how to assemble a collation to ensure that all inserts intended for a single addressee are placed in the correct envelope.

OMR Reader

The unit on the inserting system that scans the OMR marks that PB FIRST creates.

Glossary

Overcount Group Splitting

Overcount group splitting allows you to split groups of overcount items for the same recipient into multiple envelopes in order to minimize the number of envelopes that must be processed manually.

Overcount Items

Mailpieces that have too many pages to run through a FastPac DI800, 5 Series or DocuMatch DC115 (more than six sheets of paper for the DI800 or 5 Series, more than four sheets of paper for the DocuMatch DC115).

Positive Pay

A service supported by many financial institutions as a method of providing additional control over check fraud. Information on the customer's issued checks is provided to the bank and used as an authorization file to accept, reject, or question checks presented for payment.

Postal Coding

The process of verifying destination addresses as being deliverable and assigning the correct postal barcodes to them.

POSTNET

(Postal Numeric Encoding Technique) The barcode system used on letter-size and flat-size mailpieces for encoding the delivery point information and ZIP+4 code information.

Presorting

The process of sorting a postal coded mail job by zip code or carrier route in order to obtain postal discounts. The mail job must contain at least 500 pieces of First Class mail or 200 pieces of Standard mail to qualify for a presort discount.

Glossary

ProPack Barcodes and OMR Marks

A key feature of PB FIRST is its ability to generate barcodes and OMR marks that can be read by a DI800/5 Series inserting system equipped with the Production Package (ProPack) option. This option consists of the ProPack sheet feeder, optional outsort module, and optional high capacity loader. All units are used in addition to the normal inserter modules, giving even greater flexibility to DI800/5 Series mail processing capabilities.

Reports

Microsoft® Access 2000 or Access XP objects that contain the page layouts of the printed mailpieces.

Scan Map (Labels)

First page of a FastPac DI800 or 5 Series mail job that contains important information that will help set up the machine. Also used to refer to labels printed next to OMR marks on all mailpieces when debugging a mail run.

Sequence Number

Determines the order in which the records were imported into the program. Also used to reprint mailpieces with the Print Selected Pieces button.

Simplex Printing

Printing on one side of a sheet of paper.

Uncoded Items

Records that have not been or could not be postal coded.

USPS

United States Postal Service®

VeriMove™ Net

A Pitney Bowes service licensed by the USPS to update mailing lists with addresses from the NCOALink™ database.



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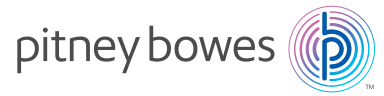
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For Service and Supplies

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