pitney bowes

Shipping & Mailing
Postage Meters

INVIEW™ Accounting
for DM125 and DM225
Digital Mailing Systems

Operator Guide
US English Version
SV62371 Rev.C
November 2023

Pitney Bowes Contact List

DM125   **DM225**

Machine Identification

Product Name: DM125 Digital Mailing System
Model Number: PR00
OR
Product Name: DM225 Digital Mailing System
Model Number: PRL1

Resources

For support information, go to **www.pitneybowes.com/us** and click **Support**. Click **Postage Meters**, then click on the appropriate product name link.

To order PB supplies and accessories, go to: **www.pitneybowes.com/us** and click **Buy Supplies**

To view a list of your equipment, pay invoices online, or you have questions about your PB Postage account go to: **www.pitneybowes.com/us** and click **Sign In**

To contact the United Stated Postal Service® (USPS), visit: **www.USPS.com**

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1 • Read This First

What's in this Guide

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Chapter 2 *System Setup for INVIEW™*	Explains how to configure your system to use the INVIEW™ Accounting system
Chapter 3 *Setting Up and Working With Accounts*	Tells you how to set up individual accounts, and edit and delete existing accounts
Chapter 4 *Running Mail*	Describes how to run mail with INVIEW™ Accounting activated
Chapter 5 *Transaction Options*	Describes how to enter manual transactions and how to view, clear or void transactions
Chapter 6 *Running Reports*	Explains how to run accounting reports provided with your system
Chapter 7 *Troubleshooting*	Describes how to handle accounting errors or warnings you may encounter on your system

Overview of Accounting

An accounting feature on a mailing system allows you to track your postage costs by categories. These categories can represent whatever makes sense to your organization - departments, people, locations, projects, etc. In more advanced accounting features (such as INVIEW™ Accounting), you can further categorize your costs using subaccounts, and even subsubaccounts.

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

The information in this manual describes how to set up the INVIEW™ Accounting option. With this model of mailing machine, you also have a choice of using the Standard accounting package.

INVIEW™ Accounting and INVIEW™ Meter Reporting

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

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

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

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

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

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

INVIEW™ Accounting and INVIEW™ Meter Reporting

Accounting Reports Option of INVIEW™ Meter Reporting

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

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

The Accounting Reports option allows you to see:

- the most used accounts by mail pieces and or postage. These results can be displayed as a stacked bar chart or as a table.

- the number of pieces and total dollars charged to each account. The total charged includes the postage, additional fees such as delivery confirmation, and any surcharges applied by the mail center. Subtotals are provided for subaccounts and subsubaccounts.

- the details for each mail class within each account. This includes the number of pieces, total charged to each account, and breakdown of total charged as postage, additional fees such as delivery confirmation, and any surcharges applied by the mail center.

- the average cost per piece at different locations over the time period selected. Pieces from all meters at each location are included in the average.

- the details on specific transactions. This includes each transaction, or batch of mail, grouped at the lowest level of account. Transaction details also include the class of mail selected for the batch (or the class determined by Weigh and Dimension on the Way), the number of pieces processed, the postage, fees, surcharge, total cost allocated, and the time each transaction started and ended.

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

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2 • System Setup for INVIEW™ Accounting

Introduction

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

You can also create a supervisor password to limit access to setting up accounts and accessing accounts (see elsewhere in this chapter). In addition, you can include account information in your custom presets. Refer to *Chapter 5, Normal and Custom Presets* of the DM100i, DM200L, DM125, DM225 Operator Guide (SV62276) for instructions on setting up presets.

Overview of INVIEW Accounting Activation and Setup

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

Step	Action	Description/Procedure
1	*Turn On Accounting Feature*	Turns on INVIEW Accounting. This is necessary before you can create accounts in INVIEW. See later section in this chapter for procedure
2	*Create a Supervisor Password (optional)*	If you establish a Supervisor password, a user will need to enter this password to add, edit, or delete Accounts; and for clearing Account totals. Also, you need to set up a Supervisor password before you can enable Account passwords. See later section in this chapter for procedure.
3	*Set Station ID (optional)*	The Station ID is printed on accounting reports to identify the mailing system where the reports were generated. This feature is useful when you have several different mailing systems that generate reports. See later section in this chapter for procedure.
4	*Setting the Accounting Period*	Sets up your accounting periods and fiscal year. See later section in this chapter for procedure.
5	*Setting Global Surcharges (optional)*	You can set up a global surcharge is that applies to each transaction (or piece) processed by INVIEW™Accounting. See later section in this chapter for procedure.
6	*Configuring Barcode Scanner (optional)*	If you are using the optional barcode scanner, you can set how it interprets data read from the barcode label attached to mail pieces that have a USPS Confirmation Services feature applied on them. See later section in this chapter for procedure.
7	*Create Account*	Sets up your account name (and password if desired). See *Chapter 3, Setting up Accounts* for procedure.
8	*Maintain (Edit) Account*	Allows you to change various attributes of an account. See *Chapter 3, Setting up Accounts* for procedure.

Overview of INVIEW Accounting Activation and Setup

Step	Action	Description/Procedure
9	*Select Account*	Allows you to choose the specific account when running a mail piece through the machine. See *Chapter 4*, *Running Mail* for procedure.
10	*View/Print Account Data*	Allows you to view/print the transaction data and totals for an account. • For viewing account data detail, see *Chapter 5, Transactions Option* for procedure. • For printing account data and totals, see *Chapter 6, Reports* for procedure.
11	*Set up PC Transfer Utility (optional)*	If you are using the PC Transfer Utility, you may need to configure the Host IP address and TCP Port for the PC. See later section in this chapter for procedure.
12	*Clear Account Data*	Allows you to clear an account (for example, at the beginning of a new fiscal year). See *Chapter 3*, *Setting up Accounts* for procedure.
13	*Delete Accounts*	Allows you to delete an account. See *Chapter 3, Setting up Accounts* for procedure. ⓘ **NOTE***:* Make sure you really want to delete an account. Once you do, the account information is gone.

Activating Accounting and Selecting INVIEW as the Type

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

1. Press the **Options** key.
2. Scroll down and select **Turn items ON/OFF.**
3. Select **Accounting**.

   (i) **NOTE 1**: If the supervisor password is enabled, you may need to enter it to gain access to all of the accounting functions.

   (i) **NOTE 2**: If Accounting was already turned on, the type of accounting currently set for your system is displayed.

4. Select **Turn Accounting ON**.
5. In the Accounting screen's Select Type menu, select **INVIEW Acct**.

   A "Please Wait..." message is displayed for a moment, then you are returned to the Home screen. INVIEW Accounting has been activated.

   NOTE on steps 4 and 5: If, prior to beginning this procedure, Accounting was already turned on and Standard Accounting activated, select **Change Type**, then select **INVIEW Acct**.

```
              ACCOUNTING
     Select Type
     ◀Standard Acct.
     ◀INVIEW Acct.
```
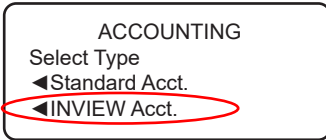
IMPORTANT:

- If you switch from one accounting system to another (that is, "Standard" to "INVIEW" or *vice versa*), **you will lose all of the data in the original accounting system**.

- Turning "OFF" the Accounting feature when you have already started using one of the accounting types ("Standard" or "INVIEW") is not recommended. Accounting data from this point forward will no longer be recorded, and your accounting data will start to go out-of-date, compromising the integrity of that data.

- If either accounting type is enabled, you **must** select an account whenever you run mail.

Setting Up a Supervisor Password

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

1. Press the **Options** key.
2. Press **Page Down** twice.
3. Select **LockCode/Passwords**.
4. Select **Supervisor Password**. If there is an existing supervisor password, you are prompted to key in the 4-digit code.

> PASSWORDS
> ◀Meter Lock Code
> ◀Supervisor Password
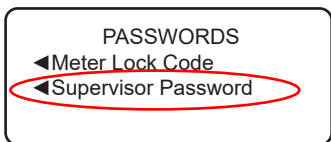
5. You then have a choice to either disable the password (if present) or change (or establish) the password.

> Supervisor Options
> ◀Disable password
> ◀Change password
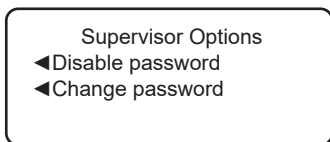
   A. To disable the password:

      Select **Disable Password**. At the "Supervisor Password has been disabled" message, select **Continue**.

   B. To change or establish the password:

      Select **Change password**. At the prompt, type in a <u>new</u> password (4 digits) and select **Continue**. Re-enter the new password again to confirm and select **Continue**. At the "Supervisor Password has been enabled" message, select **Continue**.

6. Press **Clear** (←) to return to Options menu.

2 • System Setup for INVIEW™ Accounting

Setting Up an Account Password

An account password can be used to prevent unauthorized charges to an account when running mail. If you create a password for an account, a user must enter this password before selecting it when running mail. (**NOTE:** In order to set up account passwords, the supervisor must first set up a supervisor password. See previous page in this guide.)

1. Press the **Options** key.

2. Press **Page Down** once.

3. Select **Turn items ON/OFF**.

4. Select **Account Passwords**.

5. Select **Turn Passwords ON**. You are automatically advanced to the Home screen.

6. In the Home screen, select **Select an account**.

7. In the Accounts screen, select **Manage INVIEW accts**.

8. In the Manage Accounts screen, select **Edit/View account**.

9. Use the desired search method (View List, Enter Speed Code, or Enter Acct. Name) to find and select the appropriate account.

10. In the Edit Account screen, select **Password**.

11. In the Enter Password screen, use the keypad to enter the desired password (four characters maximum).

12. In the Confirm screen, enter the password.

13. Select **Set**.

12. In the Edit Account screen, select **Done**.

13. In the Account Modified screen, select **Done**. You are automatically returned to the Manage Accounts screen.

Setting the Accounting Period

You need to set up the fiscal year (accounting period) so the system can track the transactions under the proper accounting dates used within your organization. You can also choose the intervals (monthly, quarterly, etc.) that you use for reporting your accounting data.

1. Press the **Home** key to display the Home screen, then press the appropriate softkey to select **Select an account.**

```
mmm dd yy         ≡0.00≡
◄Select an account:  Name
 ◄CLASS:  None
 ◄SCALE:   0lb 0.0oz
```

2. Select **Setup INVIEW**.

```
         ACCOUNTS
 ◄Manage INVIEW accts
 ◄Setup INVIEW
  ◄Manage Transactions
```

> (i) **NOTE**: If the supervisor password is enabled, you may need to enter it to gain access accounting setup functions.

3. Select **Accounting periods**. The Set New Acct. Period screen is displayed with the current accounting period dates.

```
  SET NEW ACCT. PERIOD
(mm/dd/yy-mm/dd/yy)
◄Standard
◄Custom
```

You have a choice of viewing or changing the following:

*   *Standard* - allows you to set up a standard (12-month) accounting year. Continue with Step 4 on next page.
*   *Custom* - allows you to set up a custom accounting year (something other than 12-months). Continue with Step 5 on page 2-8.

Setting the Accounting Period (contd.)

4. If you select **Standard**, you can change the Start Date and/or number of accounting (minor) periods in your fiscal year. The default Start Date is today's date, and the default End Date is one year ahead minus one day from today's date.

```
EDIT STANDARD PERIOD
◀Start Date mm/dd/yy
End Date   mm/dd/yy
◀Minor Periods   xx
```

• If you select **Start Date** (to modify it), a new screen prompts you to enter the start date for your fiscal year in mm/dd/yy format. Enter the date and select **OK** when done. The End Date is automatically filled in by the system as being one year later than the Start Date, less one day. For example, if you entered 03/10/10 as the Start Date, the End Date would display as 03/09/11.

  ⓘ **NOTE 1**: You can enter a Start Date that is within the current calendar year. For example, if today's date is 3/10/2010, you can enter a Start Date *as early as* 1/10/2010.

  ⓘ **NOTE 2**: Once you run a transaction, you cannot change the Start Date of the fiscal year until you clear the accounting data, which is normally done when the fiscal year ends.

• If you select **Minor Periods** (to modify it), a new screen prompts you to enter the number periods for your fiscal year. Enter **0** (annual), **2** (twice yearly), **4** (quarterly,) or **12** (monthly). Select **OK** when done. This represents the intervals (monthly, quarterly, etc.) that you use for reporting your accounting data.

Setting the Accounting Period (contd.)

5. If you select **Custom**, you can create your own accounting periods. The system automatically assigns the "Start Date" as the current date. "End Date 1" is the last day of current month, and "End Date 2" is same as End Date 1.

```
    EDIT CUSTOM PERIOD
Start Date  mm/dd/yy
◄End Date 1 mm/dd/yy
◄End Date 2 mm/dd/yy
```

- • If you select **End Date 1** (to modify it), a new screen prompts you to enter the first end date in mm/dd/yy format. This date represents when the first accounting "interval" ends in your "custom" period. Enter the date and select **OK** when done.

- • If you select **End Date 2** (to modify it), a new screen prompts you to enter the second end date in mm/dd/yy format. This date represents when your custom "period" ends, and as such, must always be equal to, or later, than End Date 1. Enter the date and select **OK** when done.

   ⓘ **NOTE 1:** For custom periods, you can extend the end dates at any time. In all cases, though, End Date 2 must always be the same as, or after, End Date 1.

   ⓘ **NOTE 2:** Once End Date 1 is reached, you either must clear the account data for that "interval", extend the end dates (for both End Date 1 and End Date 2), or do both (clear the account data and extend the end dates) You will be prompted to print the data before it is cleared. Also, you will not be allowed to run mail until you either clear the data or extend the periods.

Setting the Accounting Period (contd.)

The Custom Period feature allows you to create successive custom reporting "intervals" by extending End Date 1 when the first End Date 1 has been reached.

For example, if you need to track your accounts on a weekly basis for a month, enter an End Date 1 that represents one week into the future, and set your End Date 2 to a date one month in advance. Once End Date 1 date is met, print your reports for this interval and then clear it. Then change End Date 1 to one week into the future again. Once that End Date 1 date is met the following week, print your reports again for this interval and then clear it. Continue with these steps until you complete the whole month.

In the meantime, your period represented by End Date 2 continues to accumulate totals from each of your "interval" weeks, so that by the end of the month, the data represents the total for all of your weeks (that is, all of your "intervals"). At this point, you can print the totals, clear the totals, or continue to extend the dates as needed.

Setting Global Surcharges

A global surcharge is a permanent surcharge that you can apply to each transaction (or piece) processed by INVIEW™Accounting.

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

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

- A per piece of mail surcharge is calculated by multiplying the number of pieces processed by the surcharge setting. The per piece surcharge can be set anywhere from 0.01 to 1.00 (plus or minus).
- A per transaction surcharge is applied to each transaction run on the system. The per transaction surcharge can be set anywhere from .01 to 50.00 (plus or minus).
- A per transaction percentage surcharge is calculated multiplying the postage cost of the entire batch by the percent transaction setting. The per transaction percentage can be set anywhere from 0 to 100% (plus or minus).

Turning Surcharges On and Off

To turn the global surcharge feature on and off:

1. Press the **Home** key to display the Home screen, then select **Select an account.**

2. Select **Setup INVIEW.**

   ⓘ **NOTE**: If the supervisor password is enabled, you may need to enter it to gain access accounting setup functions.

3. Select **Global surcharges**. The Global Surcharges screen is displayed.

   ```
    GLOBAL SURCHARGES
   ◄Surcharges  <ON><OFF>
   ◄Per Piece:
   ◄Per Trans:
   ```

4. Select **Surcharges**. You can toggle between "ON" and "OFF".

5. Press **Clear** (←) to return to Setup INVIEW menu.

Configuring Surcharges

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

1. Press the **Home** key to display the Home screen, then select **Select an account.**

2. Select **Setup INVIEW**.

   ⓘ **NOTE***:* If the supervisor password is enabled, you may need to enter it to gain access accounting setup functions.

3. Select **Global Surcharges**. The Global Surcharges screen(s) is displayed. Press **Page Down** to view the second screen.

   ```
   GLOBAL SURCHARGES
   ◄Surcharges  <ON><OFF>
   ◄Per Piece:
   ◄Per Trans:
   ```

   ```
   GLOBAL SURCHARGES
   ◄Per Trans %:
   ◄Clear all Surcharge
   ```

4. To add a surcharge or discount per piece:

   ```
   PER PIECE VALUE
   $x.xx (0.01 to 1)
   ◄Make surcharge (+)
   ◄Make discount (-)
   ```

   a. Select **Per Piece** (at Step 3).

   b. Type the amount you wish to use for each individual piece of mail.

   c. Select either:

      Make surcharge if the amount will be *added* to the piece cost. A *positive* amount indicates a surcharge will be applied to the postage amount for a transaction.

      Make discount if the amount will be *subtracted* from the piece cost. A *negative* amount indicates a discount will be applied to the postage amount for the transaction.

Configuring Surcharges (contd.)

5. To add a surcharge or discount per transaction:

> PER TRANS VALUE
> $xx.xx (0.01 to 50)
> ◄Make surcharge (+)
> ◄Make discount (-)

    a. Select **Per Trans** (at Step 3).

    b. Type the amount you wish to use for each transaction.

    c. Select **Make surcharge** or **Make discount** as appropriate (see Step 4 for explanation).

6. To add a surcharge or discount per transaction percentage:

> PER TRANS % VALUE
> xx% (0 to 100)
> ◄Make surcharge (+)
> ◄Make discount (-)

    a. Select **Per Trans%** (at Step 3).

    b. Type the percentage amount you wish to use.

    c. Select **Make surcharge** or **Make discount** as appropriate (see Step 4 for explanation).

Clearing All Surcharges

Follow the steps below to clear the global surcharges.

1. Press the **Home** key to display the Home screen, then select **Select an account.**

2. Select **Setup INVIEW**.

   ⓘ **NOTE***:* If the supervisor password is enabled, you may need to enter it to gain access accounting setup functions.

3. Select **Global surcharges**. The Global Surcharges screen is displayed. Press **Page Down** to view the second screen.

   ```
       GLOBAL SURCHARGES
   ◀Surcharges  <ON><OFF>
   ◀Per Piece:
   ◀Per Trans:
   ```

   ```
       GLOBAL SURCHARGES
   ◀Per Trans %:
   ◀Clear all Surcharge
   ```

4. Select **Clear all Surcharges**.

5. The Clear All Surcharges screen is displayed. Select **Yes, clear** to permanently clear surcharges already assessed.

6. Press **Clear** (←) to return to Setup INVIEW menu.
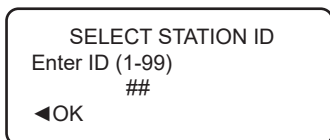
Setting a Station ID

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

1. Press the **Home** key to display the Home screen, then select **Select an account.**

2. Select **Setup INVIEW**.

   ⓘ *NOTE:* If the supervisor password is enabled, you may need to enter it to gain access accounting setup functions.

3. Select **Station ID**.

```
     SELECT STATION ID
   Enter ID (1-99)
             ##
   ◄OK
```

4. Type the Station ID.

   ⓘ *NOTE:* Station IDs must be between 1 and 99.

5. Select **OK** when done.

Configuring the Optional Barcode Scanner

This feature allows you to set how the optional barcode scanner interprets data read from the barcode label attached to mail pieces that have a USPS Confirmation Services feature applied on them.

1. Press **Options**.
2. Press **Page Down** twice.
3. Select **Advanced Features**.
4. Select **Barcode Scanner**.
5. The following selections appear.

   A. *Default* - Use the soft key next to this selection to toggle between "E-Service" or "ZIP". This determines how the scanner interprets the data being scanned– as either an E-service code or a ZIP code – when entering USPS Confirmation services records into your mailing machine.

   B. *Auto-Enter* - Use the soft key next to this selection to toggle between "OFF" or "ON".

   If set to "OFF", after the system scans in a post code or barcode value and displays it on the screen, it requires you to manually press the softkey to continue to the next screen (i.e., to accept that value). This option is used if you want to be sure that an operator verifies that the correct barcode or post code has been scanned before continuing.

   If set to "ON", the system automatically advances to the next screen after scanning a barcode label or post code.

Setting Up the Optional PC Transfer Utility

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

1. Press the **Home** key to display the Home screen, then select **Select an account.**
2. Select **Setup INVIEW**.
3. Scroll down and select **PC transfer utility**. The PC Transfer Utility screen is displayed.

```
PC TRANSFER UTILITY
◄ IP
◄ TCP Port
◄ OK
```
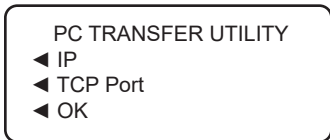
4. Select **IP**. Follow the prompts to enter the IP address.
5. Select **TCP Port**. Enter the four-digit port number.
6. Follow the **Continue** or **OK** prompts to save your changes.

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3 • Setting Up and Working with Accounts

Account Options

Account options allow you to set up accounts customized to your needs for tracking accounting data.

To access INVIEW account setup options, press the **Home** key to display the Home screen, press the appropriate soft key to select **Select an account**, then select **Manage INVIEW accts**.

```
mmm dd yy          ≡0.00≡
◄Select an account: Name
◄CLASS: None
◄SCALE:  0lb 0.0oz
```

Home screen

```
        ACCOUNTS
◄Select an account
◄Manage INVIEW accts
◄Setup INVIEW
```
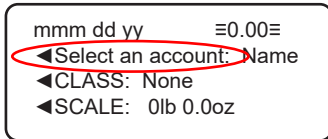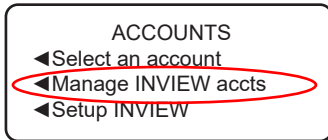
NOTE: The **Select an account** option appears in the Accounts screen only after you have created accounts. (See elsewhere in this chapter.)

ⓘ *NOTE:* If the **Manage INVIEW Accounts** menu option does not appear, you need to enable it on your system. See *Chapter 2 - System Setup For INVIEW Accounting*.

INVIEW™ Accounting Structure

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

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

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

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

- When you create a top level account, you can charge funds and pieces to that account. This is the working (chargeable) account because at this point it does not have any subordinate accounts:

  Example: Account - Engineering

- If you create sub accounts for the original account, they become the end links in the account chain and identify the departments where you charge to:

  Examples:

  Account - Engineering, Sub account - Software

  Account - Engineering, Sub account - Industrial Design

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

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

  Examples:

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

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

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

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

Managing Accounts

INVIEW accounts are added and maintained from the Manage Accounts screen (see below), accessed by pressing a softkey to select **Select an account** from the Home screen, then selecting **Manage INVIEW accts**. Press **Page Down** to view the second screen.

```
    MANAGE ACCOUNTS
  ◄Create an account
  ◄Create sub account
  ◄Create sub-sub account
```

```
    MANAGE ACCOUNTS
  ◄Delete an account
  ◄Edit/View account
  ◄Clear account data
```
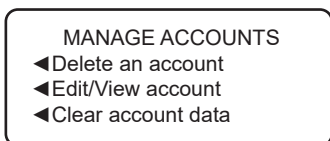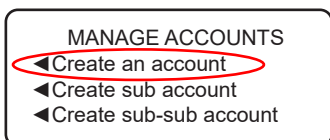
NOTE: Before you've created your first account, only the **Create an account** option is displayed in the Manage Accounts screen. After you've set up accounts, these additional options are also displayed.

Creating a New Account

Follow the steps below to create a new account.

1. Press the **Home** key to display the Home screen, then press the appropriate softkey to select **Select an account.**

2. Select **Manage INVIEW Accounts**.

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

3. Select **Create an account**. The Enter Name screen is displayed.

Creating a New Account

4. Complete the fields for this account, as prompted.

    A. Type the account name, then select **Done**.

        (i) **NOTE**: When naming your accounts, the total number of characters you can use for the name is 74. This means that if you intend to add sub and subsub accounts to this top level account name, the sum of the characters for all three accounts levels cannot be greater than 74.

    B. If the Password menu option is displayed, select **Password** to assign the account password. Type the account password and select **Continue**. You are prompted to re-enter the password. Type the password again and select **Set**.

    C. Select **Speed Code** to change the speed code number assigned by the system. Select the appropriate speed code from the list provided. If necessary, use the green down arrow key to scroll through the list.

        (i) **NOTE**: A speed code is a number that uniquely identifies an account. You can use it as a short cut to identify accounts with long names. As soon as you enter the name of your account, the system automatically assigns a speed code to your account.

    D. Press the green down arrow key and select **Desc**. Type a description (from 1 to 32 characters) of the account and select **Done**.

```
        ENTER NAME


  _ _ _ _ _ _ _ _ _ _ _
```

```
        Create Account
  ◄Name:
  ◄Password:
  ◄Speed Code: <xxxx>
```

```
        Create Account
  ◄Desc:   <1 char          >
  <32 char                   >
  ◄Done
```

Creating a New Account

Creating a Sub Account or SubSub Account

Follow the steps below to create a new sub or sub-sub account.

1. Press the **Home** key to display the Home screen, then select **Select an account.**

2. Select **Manage INVIEW Accounts**.

    (i) **NOTE:** If the supervisor password is enabled, you may need to enter it to gain access to all of the accounting functions

3. Select **Create sub account** or **Create sub-sub account**.

4. Select the appropriate account from the list.

    *   If this the first sub account you are adding to the account, the Edit Name screen is displayed.

    *   If sub accounts and subsub accounts already exist for the account, the Add Sub or SubSub to Account screen is displayed. Select the appropriate accounting level to continue.

    A. Type the sub account name.

    B. Select **Password** to assign the account password. Type in the account password and select **Continue**. You are prompted to re-enter the password. Type the password again and select **Set**.

    C. Select **Speed Code** to change the speed code number assigned by the system. Select the appropriate speed code from the list provided. If necessary, use the green down arrow key to scroll through the list.

    D. Press the green down arrow key and select **Desc**. Type in a description (from 1 to 32 characters) of the account and select **Done**.

Viewing and Editing Accounts

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

Follow the steps below to view or edit an account.

1. Press the **Home** key to display the Home screen, then select **Select an account.**

2. Select **Manage INVIEW Accounts**.

    (i) **NOTE:** If the supervisor password is enabled, you may need to enter it to gain access to all of the accounting functions

3. Press **Page Down** and select **Edit/View Account**.

    If sub accounts and subsub accounts already exist for the account, the select Sub or SubSub to Account screen displays. Select the appropriate accounting level to continue. Once you have selected your account, You may:

    A. Edit the account name by selecting **Name** and following the prompts.

        (i) **NOTE:** You can not rename an account with active data.

    B. Edit the password by selecting **Password** and following the prompts.

    C. Edit the speed code by selecting **Speed Code** and following the prompts.

    D. Edit the description by pressing the green down arrow. selecting **Description**, and following the prompts.

    E. When finished, select **Done**, or select **Edit another acct.** and select another account to edit.

Clearing Account Data

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

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

Follow the steps below to clear accounting data.

1. Press the **Home** key to display the Home screen, then select **Select an account.**

2. Select **Manage INVIEW Accounts**.

   (i) **NOTE:** If the supervisor password is enabled, you may need to enter it to gain access to all of the accounting functions

3. Press **Page Down** and select **Clear Account Data**. The Clear Account Data screen is displayed.

   ```
   CLEAR ACCOUNT DATA
   ◄Print Reports
   ◄Clear all data
   ◄Clear period data
   ```
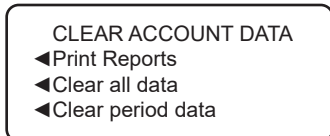
   - *Print Reports* – Allows you to print your accounting reports. The Accounting Reports screen displays. Select INVIEW Reports. Select the appropriate report and follow the prompts to print the report (see *Chapter 6 - Reports* for further information).

   - *Clear All Data* – Allows you to delete to all accounting data. You will be prompted to upload your accounting data to avoid data loss. If you have already uploaded your data, or are sure you no longer need this data, select **Continue**.

   - *Clear Period Data* – Allows you to delete accounting data for a "Custom" period only. You will be prompted to upload your accounting data to avoid data loss. If you have already uploaded your data, or are sure you no longer need this data, select **Continue**.

     (i) **NOTE:** Refer to *Chapter 2 - System Setup* for an explanation of a "Custom" period vs. a "Standard" period.

Deleting an Account

IMPORTANT:
- Deleting an account deletes all of the information for that account.
- If there is any information connected to an account (for example, transaction data), the system will not allow you to delete the account until the end of the fiscal year or until you have cleared the data in the account (see previous section).

Follow the steps below to delete an account.

1. Press the **Home** key to display the Home screen, then select **Select an account.**

2. Select **Manage INVIEW Accounts**.

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

3. Press **Page Down** and select **Delete an Account**.

4. The Select Account screen allows you to select from all of the available account, sub account, and subsub account combinations on the system. If necessary, use the green down arrow key to scroll through the list. Select the account you want to delete.

5. When prompted to delete the account, select the **Yes/Enter** or **No** button on the control panel. If successful, an Account Deleted screen is displayed. You can select **Yes** to select another account to delete, or select **No** to finish.

   ⓘ *NOTE:* If the account you wish to delete has active data, a message appears stating this. You will need to either wait until the fiscal year has ended or clear/upload the data manually before you can delete this account.

4 • Running Mail

Home Screen with INVIEW™ Accounting Activated

Shown below is a typical Home screen as displayed when you first log onto your system and INVIEW™ Accounting is activated. These screens reflect the selections you've made for applying postage.

ⓘ **NOTE**: To access additional postage settings, press the green **Page Down** key on the machine to view additional pages of the Home screen.

```
mmm dd yy          ≡0.00≡
◄Select an account:  Name
◄CLASS:  None
◄SCALE:  0lb 0.0oz
```

```
◄AD:      None
◄INSC:    None
◄IND1:    Traditional
```

```
◄Text:    None
◄Chg/P:  None
◄Chg/T:  None
```

```
◄Chg%:  None
```

Selecting an Account to Track Postage

You can find and select an account using any one of several search methods (see step 3 below). Follow the steps below to find and select an account.

1. Press the **Home** key to display the Home screen, then press the appropriate softkey to select **Select an account.**

```
mmm dd yy          ≡0.00≡
◄Select an account: Name
◄CLASS:  None
◄SCALE:  0lb 0.0oz
```
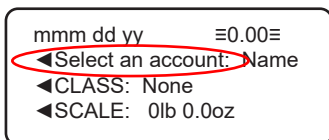
2. Select **Select an account** from the Accounts screen.

```
            ACCOUNTS
◄Select an account
◄Manage INVIEW accts
◄Setup INVIEW
```
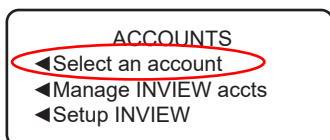
3. The Select Account screen is displayed (a sample is shown below). Press **Page Down** to view more menu options (if lit). To select an account, use the desired search method (View List, Enter Speed Code, or Enter Acct. Name) to find and select the appropriate account.

```
        SELECT ACCOUNT
◄ View List
◄ Enter Speed Code
◄ Enter Acct. name
```
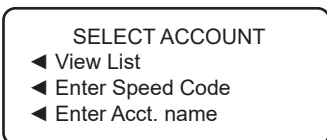
4. If a password has been assigned to this account, you will be prompted to enter one. Enter the 4-digit password if necessary, using the machine's keypad.

5. You are returned to the Home screen with the account name listed (the example below shows "Sales" as the account selected).

```
mmm dd yy          ≡0.00≡
◄ACCT:  Sales
◄CLASS:  None
◄SCALE:   0lb 0.0oz
```
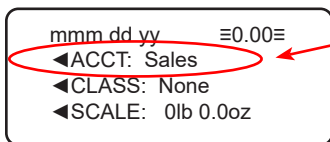
ⓘ **NOTE**: If the account name is more than 16 characters long, it will be truncated on the screen, for example, *Quality...Dept*.

Applying Postage

There are several ways you can apply postage using your mailing system:

- Enter the postage directly, using the keypad, when you already know the amount.
- Enter the weight of the mail piece manually, using the keypad, and have the system calculate the postage amount using the system's internal rating feature.
- Place the mail piece on the integrated weighing platform (if purchased) and have the system calculate the weight and postage amount, using the system's internal rating feature.

Refer to *Chapter 3, Running Mail* in the DM100i, DM200L, DM125, DM225 Operator Guide (SV62276) for more information about applying postage.

Selecting a Class or Special Services

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

Refer to the *Chapter 3, Running Mail* in the DM100i, DM200L, DM125, DM225 Operator Guide (SV62276) for more information about selecting a class or special service.
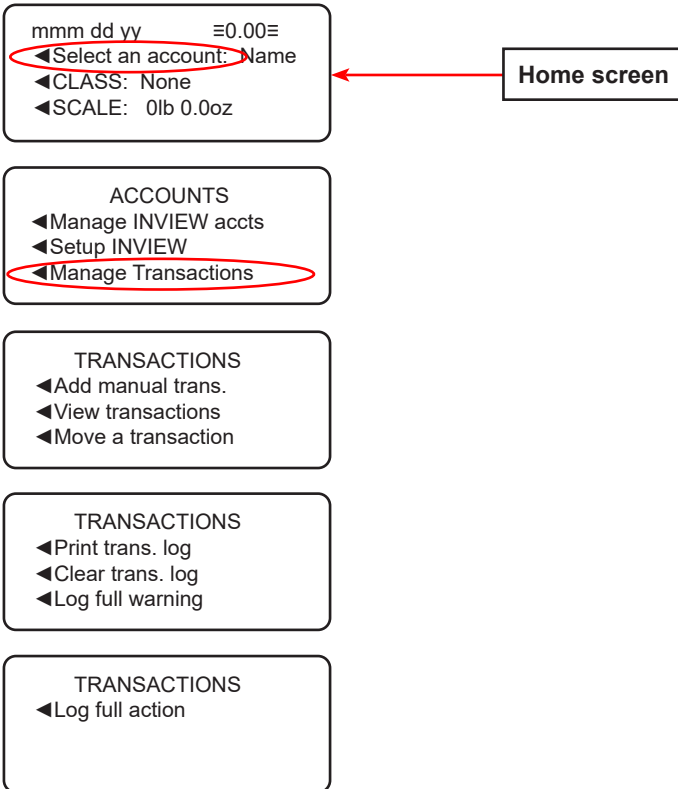
This Page Intentionally Blank

5 • Transaction Options

Transaction Options

Transaction options allow you to view transaction data on your mailing system, as well as to create manual transactions for an account.

To access INVIEW transaction options, press the **Home** key to display the Home screen, press the appropriate soft key to select **Select an account**, then select **Manage Transactions**.

```
mmm dd yy          ≡0.00≡
◄Select an account:  Name
◄CLASS:  None
◄SCALE:   0lb 0.0oz
```
Home screen

```
         ACCOUNTS
◄Manage INVIEW accts
◄Setup INVIEW
◄Manage Transactions
```

```
       TRANSACTIONS
◄Add manual trans.
◄View transactions
◄Move a transaction
```

```
       TRANSACTIONS
◄Print trans. log
◄Clear trans. log
◄Log full warning
```

```
       TRANSACTIONS
◄Log full action
```

Viewing a Transaction

Follow the steps below to view the details of your transactions.

1. Press the **Home** key to display the Home screen, then press the appropriate softkey to select **Select an account.**
2. Scroll down and select **Manage Transactions.**
3. Select **View transaction**. The Select Transaction screen is displayed. The transactions are sorted by date, with the most current transaction on top of the list.

   NOTE: The system will display an asterisk (*) before the transaction number for transactions that have not been uploaded to the PB DataCenter.
4. Press the green down arrow key to see more choices (if lit). Press the selection key that corresponds with the transaction you want to view.
5. The Trans. Details screen is displayed. Use the scroll keys to view the various screens of transaction details for this transaction.

```
TRANS. DETAILS xxxx
Acct:.
Postage:
Chg Amt:
```

```
TRANS. DETAILS xxxx
Pieces:
Weight:
TransType:
```

```
TRANS. DETAILS xxxx
Carrier:
Class:
Fees:
```

6. When finished viewing, press **Clear** (←) to exit the Trans. Details screens.

Viewing a Transaction (contd.)

- **Select an account** = name of the selected account. The name will be condensed with an ellipsis (…) if necessary.
- **Postage** = total postage for the transaction
- **ChrgAmt**: = total postage +/- any surcharges
- **Pieces** = total pieces for the transaction
- **Weight** = total weight for the transaction. If the transaction record has no weight data (because the transaction was done in KIP mode), display nothing in the value field. The weight will be in one of the following formats depending on the weight units for the PCN.
    - xxlb xx.xoz
    - xxx.xxx kg
    - xxx g
- **TransType** = indicates the type of transaction.
    - "M" for a manually entered transaction
    - "I" for an interactive transaction (that is, you actually ran the mail through the meter while INVIEW Accounting was in use)
    - "E" for edited transaction (that is, you moved the transaction to a different account)
- **Carrier** = name of the carrier. The name will be condensed with an ellipsis (…) if necessary. If the rates don't support a carrier value or the transaction record doesn't have a carrier value, display nothing in the value field.
- **Class** = concatenated class+sub class name. The name will be condensed with an ellipsis (…) if necessary. If the transaction record has no class data (because the transaction was done in KIP mode), display "No Class" in the value field.
- **Fees** = total rating fees for the transaction. If no fees, display nothing in the value field.

Adding a Manual Transaction

Follow the steps below to add a manual transaction.

1. Press the **Home** key to display the Home screen, then select **Select an account.**
2. Scroll down and select **Manage Transactions.**
3. Select **Add manual trans**. The Add Man Trans menu screen is displayed. Use the green down arrow key to view all three entry screens (if desired).

> ADD MANUAL TRANS.
> ◀Acct:. Select Account
> ◀Class:
> ◀Done

> ADD MANUAL TRANS.
> ◀Postage:
> ◀Chrg Amt:
> ◀Done

> ADD MANUAL TRANS.
> ◀Piece Ct:
> ◀Weight:
> ◀Done

4. Select **Select an account** to select the account you want to charge for the manual transaction.
5. The Select Account screen is displayed (a sample is shown below). Press **Page Down** to see more choices (if lit). Use the available options to search for and select the desired account.

> SELECT ACCOUNT
> ◀ View List
> ◀ Enter Speed Code
> ◀ Enter Acct. name

Adding a Manual Transaction (contd.)

7. If a password has been assigned to this account, you will be prompted to enter one. Key in the 4-digit password if necessary.

8. You return to the Add Manual Trans screen with the name of the account listed (example below shows "Sales" selected).

```
    ADD MANUAL TRANS.
   ◀Acct:. Sales
   ◀Class:
   ◀Done
```

9. Select **Class** to set the postage class. Follow the prompts to select the appropriate postage class.

10. Press the green down arrow key and select **Postage** to set the actual postage amount for a piece of mail. Type in the actual postage amount for a piece of mail.

11. Select **Chrg Amt** to set the postage amount that you will be charging for each piece of mail. Type in the charged postage amount for a piece of mail.

    ⓘ **NOTE**: This is the actual postage amount plus any surcharges you may want to add. The minimum amount you can enter is $0. The maximum amount you can enter is $50 greater than the actual postage amount.

12. Press the green down arrow key and select **Piece Ct.** to set the number of pieces of mail you want to process. Type in the number of pieces of mail.

13. Select **Weight** to enter the weight for a piece of mail.

    A. Type in the number of pounds a piece of mail weighs. If a piece of mail weighs less than one pound, skip to step B.

    B. Select **Edit Ounces** and type the number of ounces a piece of mail weighs.

14. Once you have finished setting up your manual transaction, select **Done** to save your changes. The system will return to the Home screen.

    ⓘ **NOTE**: When you run reports, an "M" in the Transaction Type column denotes a manual transaction.

Moving (Transferring) Transaction Data From One Account to Another

You can use this option to correct transactions that have been processed against the wrong account.

1. Press the **Home** key to display the Home screen, then select **Select an account.**
2. Scroll down and select **Manage Transactions.**
3. Select **Move a transaction**. The Select Transaction screen is displayed. The transactions are sorted by date, with the most current transaction on top of the list.
4. Press the green down arrow key to see more choices (if lit). Press the selection key that corresponds with the transaction you want to move.
5. The Trans Details screen is displayed. Use the scroll keys to view the various screens of transaction details for this transaction to ensure this is the one you want moved.
6. When ready, select **OK to Transfer** on any of the Trans Details screens.
7. Follow the prompts to specify the account you want to transfer the transaction to.
8. When the correct account has been displayed, select **Yes, transfer**. The transaction data is transferred to the new account.

   (i) **NOTE**: If subaccounts are used, transactions can only be assigned from, and to, the lowest subaccount of an account.

9. The system returns to the Select Transaction screen. Press **Clear** (←) to return to the Transactions menu screen.

Moving (Transferring) Transaction Data From One Account to Another (contd.)

- **Select an account** = name of the selected account. The name will be condensed with an ellipsis (…) if necessary.
- **Postage** = total postage for the transaction
- **ChrgAmt**: = total postage +/- any surcharges
- **Pieces** = total pieces for the transaction
- **Weight** = total weight for the transaction. If the transaction record has no weight data (because the transaction was done in KIP mode), display nothing in the value field. The weight will be in one of the following formats depending on the weight units for the PCN.
  - xxlb xx.xoz
  - xxx.xxx kg
  - xxx g
- **TransType** = indicates the type of transaction.
  - "M" for a manually entered transaction
  - "I" for an interactive transaction (that is, you actually ran the mail through the meter while INVIEW Accounting was in use)
  - "E" for edited transaction (that is, you moved the transaction to a different account)
- **Carrier** = name of the carrier. The name will be condensed with an ellipsis (…) if necessary. If the rates don't support a carrier value or the transaction record doesn't have a carrier value, display nothing in the value field.
- **Class** = concatenated class+sub class name. The name will be condensed with an ellipsis (…) if necessary. If the transaction record has no class data (because the transaction was done in KIP mode), display "No Class" in the value field.
- **Fees** = total rating fees for the transaction. If no fees, display nothing in the value field.

Print Transactions Log Report

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

1. Press the **Home** key to display the Home screen, then select **Select an account.**
2. Scroll down and select **Manage Transactions.**
3. Select **Print trans. log**. The Print Trans. Log screen is displayed.
4. You are prompted to print **All accounts** or to **Select an account**.
5. The Date Range to print screen is displayed.
6. Select **Start Date**.
   a. If necessary, press the **Clear** (←) key to clear the existing date. Use the numeric keys to enter the start date for your report in MMDDYY format.
   b. Select **OK** when done.
7. Select **End Date**.
   a. If necessary, press the **Clear** (←) key to clear the existing date. Use the numeric keys to enter the end date for your report in MMDDYY format.
   b. Select **OK** when done.
8. Select **Print - USB printer**. The report is sent to the printer.

```
Pitney Bowes Incorporated          Page:      1
1 Elmcroft Road                    Date:      JAN 5 2008
Stamford, CT 06926                 Time:      3:02P
                                   Station:   2A
           Transactions for JAN 1 2008 to JAN 5 2008

Trans                                                  Trans
ID     Account        Pieces  Postage  Surcharge  Total  Type
   1   Shelton             9    5.400       0.00  5.400  I
   2   Stamford           24   13.070       0.00 13.070  I
   3   Newtown             3   11.550       0.00 11.550  I
================================================================
Grand Total:              43   34.450       0.00 34.450
```

Clearing the Transaction Log

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

Refer to the next two sections on Transaction Log Full settings for more information about transaction log warnings.

Follow the steps below to clear transaction data.

1. Press the **Home** key to display the Home screen, then select **Select an account.**
2. Scroll down and select **Manage Transactions.**
3. Select **Clear trans. log**. The Clear the transaction log? screen is displayed.

   (i) **NOTE**: If there are transactions in the log at this point (that is, transactions that have not been uploaded to the Data Center), you are given a choice to upload or clear the log (delete the transactions). You need to choose one before continuing.
4. Select **Yes, clear** to clear the log. The system returns to the Transactions menu screen.

Setting When Transaction Log Full Message Displays

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

Follow the steps below to set the percentage of how full the log is before the system notifies you of a "Log Full" message.

1. Press the **Home** key to display the Home screen, then select **Select an account.**
2. Scroll down and select **Manage Transactions.**
3. Press the green down arrow key twice and select **Log full warning**.
4. Enter a value between 80 and 100 (representing the percentage full) and select **OK**.
5. The system returns to the Transactions menu screen.

Defining the Action When the Transaction Log is Full

This option allows you to select the action you want the system to take when the transaction log is full. You can choose to stop processing mail, delete older transactions, or disable accounting.
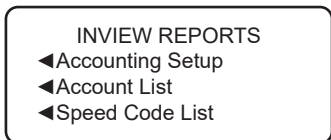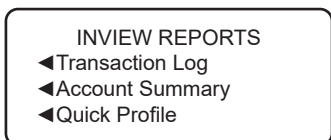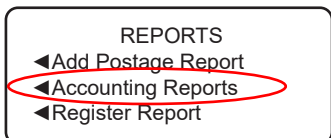
Follow the steps below to select the action for the system to take when the log is full.

1. Press the **Home** key to display the Home screen, then select **Select an account.**
2. Scroll down and select **Manage Transactions.**
3. Press the green down arrow key twice and select **Log Full Action**.
4   A screen explaining the desired action when the log is full displays. Select **Next Page.**
5. The next screen provides options for action. Select the one desired.
    *   *Show Alert & Stop* – displays "Log Full" and stops the system. This forces the operator to do something about the issue, such as upload transactions, delete old transactions, or go to a supervisor for assistance.
    *   *Delete older trans.* – prompts you to delete transactions before continuing.
    *   *Disable accounting* – disables the accounting feature. This allows you to run the system, but transactions will no longer be recorded to accounts. Your accounting data will start to go out-of-date, compromising the integrity of that data.
6. The system returns to the Transactions menu screen.

6 • Reports

Accounting Reports

To access INVIEW accounting reports, press the **Reports** key to display the Reports screen, then press the appropriate soft key to select **Accounting Reports**.

```
        REPORTS
◄Add Postage Report
◄Accounting Reports
◄Register Report
```

```
     INVIEW REPORTS
◄Transaction Log
◄Account Summary
◄Quick Profile
```

```
     INVIEW REPORTS
◄Accounting Setup
◄Account List
◄Speed Code List
```

Transactions Log Report

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

1. Press the **Reports** key to display the Reports screen, then press the appropriate softkey to select **Accounting Reports**.

2. Select **Transaction Log**. The Print Trans. Log screen is displayed.

3. Select the desired account or **All Accounts**. The Date Range to Print screen is displayed.

4. Select **Start Date**.

   a. If necessary, press the **Clear** (←) key to clear the existing date. Use the numeric keys to enter the start date for your report in MMDDYY format.

   b. Select **Accept** when done.

5. Select **End Date**.

   a. If necessary, press the **Clear** (←) key to clear the existing date. Use the numeric keys to enter the end date for your report in MMDDYY format.

   b. The report is sent to the printer.

Pitney Bowes Incorporated   Page: 1
1 Elmcroft Road   Date: JAN 5 2008
Stamford, CT 06926   Time: 3:02P
             Station: 2A

Transactions for JAN 1 2008 to JAN 5 2008

Trans ID	Account	Pieces	Postage	Surcharge	Total	Trans Type
1	Shelton	9	5.400	0.00	5.400	I
2	Stamford	24	13.070	0.00	13.070	I
3	Newtown	3	11.550	0.00	11.550	I

===

Grand Total:		43	34.450	0.00	34.450	

Account Summary

The Account Summary Report lists a summary of pieces, post-age and surcharges for an account or all accounts that have been charged for the time period specified for the report.

1. Press the **Reports** key to display the Reports screen, then select **Accounting Reports.**
2. Select **Account Summary.** The Select Account to Print screen displays.
3. Select the desired account or **All Accounts**. The Select Period to Print screen is displayed.
4. Follow the prompts to select the start date and end date. The report is sent to the printer.

```
Pitney Bowes Incorporated                    Page:       1
1 Elmcroft Road                              Date:       JAN 5 2008
Stamford, CT 06926                           Time:       3:02P
                                             Station:    2A
          Account Summary - JAN 1 2008 to JAN 30 2008


Account              Pieces  Postage  Surcharge           Total
PB
      Stamford
          WHQ            28   31.030      0.00            31.030
      Subtotal:          28   31.030      0.00            31.030

=============================================================
Grand Total:            28   31.030      0.00            31.030
```

Quick Profile Report

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

1. Press the **Reports** key to display the Reports screen, then select **Accounting Reports.**
2. Select **Quick Profile**. The report is sent to the printer.

```
                                    Page:       1
                                    Date:       JAN 30 2008
                                    Time:       3:02P
                                    Station:    2A

                Quick View for - JAN 08 2008 to JAN 30 2008


Serial No        Pieces   Postage  Surcharge   Discrepancy       Total
8030403          122      344.780  0.050          0.000          344.830
=================================================================
Grand Total:     122      344.780  0.050          0.000          344.830
```

Accounting Setup Report

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

1. Press the **Reports** key to display the Reports screen, then select **Accounting Reports.**
2. Press the green down arrow key.
3. Select **Accounting Setup**. The report is sent to the printer.

Accounting Setup

Configuration Item	Value
INVIEW PCN	xxxx
Number of Accounts	13
Accounting Periods	12
Account Passwords	Enable
Default Spend Limit Basis	90%
Spend Limit	Enable
Operators	Disable
Passwords	Enable
Global Surcharge Method	0
Per Piece Surcharge	+0.000000
Per Transaction	+0.000000
Percentage Surcharge	0%
Per Piece Surcharge Limit	1.000000
Per Transaction Limit	50.000000
Transaction Warning	90%
Transaction Full Action	Alert Operator
Owner Name	
Owner Address	

Account List Report

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

1. Press the **Reports** key to display the Reports screen, then select **Accounting Reports.**
2. Press the green down arrow key.
3. Select **Account List**. The report is sent to the printer.

Account	Account Status	Password Required	Account Description
Connecticut	Enable	No	
Bridgeport	Enable	No	
Hartford	Enable	No	
New Haven	Enable	No	
PB	Enable	No	
Danbury	Enable	No	
DMT	Enable	No	
Newtown	Enable	No	

Account List & Status

Speed Code List Report

The Speed Code List Report lists the accounts that have been de-
fined in the system. The report is sorted by account speed code
(the number that you can enter to select an account on screens that
prompt you for an account).

1. Press the **Reports** key to display the Reports screen, then select
   Accounting Reports.
2. Press the green down arrow key.
3. Select **Speed Code List**. The report is sent to the printer.

Account Speed Code List

Speed Code	Account	Description
1	Shelton	
2	Stamford	
3	Connecticut - Hartford	
4	Connecticut - New Haven	
5	Connecticut - Bridgeport	
6	PB-Shelton-27WV	
7	PB-Shelton-35WV	
8	PB-Stamford-Main Plant	
9	PB Newtown-Distribution	
10	PB Newtown-RMA	

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7 • Transferring Data at End of Fiscal Periods

Transferring Data at the End of Accounting Periods

When a standard (monthly, quarterly, twice yearly, annual) accounting period ends, we recommend you print reports and/or transfer your data using PC Transfer.

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

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

Transferring Data at End of Fiscal Year

Standard Accounting Periods

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

1. Select **Account**. The End of Accounting Period screen is displayed.

2. Select **Print Reports**. Follow the prompts to print a copy of each report. Alternately, or in addition to printing reports, transfer all data using PC Transfer.

> End of Accounting Period
>
> Account data must be cleared.
>
> ◄ Print Reports
> ◄ Clear All Data
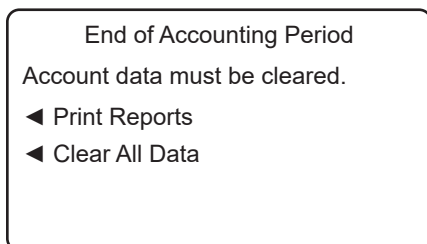
(i) **NOTE**: It is important to print out and/or transfer data because all data will be permanently deleted in the next step.

3. Once you have finished printing reports and/or transferring data, return to the Home screen and select **Account**. The End of Accounting Period screen is displayed.

4. Select **Clear All Data**. The Confirm Clear Account Data screen is displayed.

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

6. Press the green down arrow key and select **Acct Period**. The Accounting Period screen is displayed. Refer to *Setting the Accounting Period* in this section to set up the accounting period for the new fiscal year.

Transferring Data at End of Fiscal Year

Custom Accounting Periods

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

1. Select **Account**. The End of Accounting Period screen is displayed.

2. Select **Print Reports**. Follow the prompts to print a copy of each report. Alternately, or in addition to printing reports, transfer all data using PC Transfer.

> End of Accounting Period
>
> Account data must be cleared.
>
> ◄ Print Reports
> ◄ Clear All Data
> ◄ Extend Period
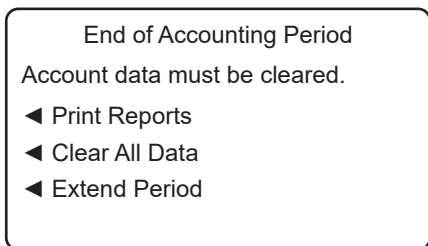
ⓘ **NOTE**: If you are at the end of the second custom period, it is important to print out and/or transfer data. All data will be permanently deleted in the next step.

3. Once you have finished printing reports and/or transferring data, return to the Home screen and select **Account**. The End of Accounting screen is displayed.

4. If you want to extend the end date, select **Extend Period**.

   a. Select **End Date 1** to set the end date for the first custom period. If necessary, press the **Clear** (←) key to clear the existing date. Type in the date in MMDDYY format and select **Accept**.

   b. Select **End Date 2** to set the end date for the second custom period. If necessary, press the **Clear** (←) key to clear the existing date. Type in the date in MMDDYY format and select **Accept**.

   c. Select **Done**. The Accounting Period screen is displayed.

   d. Press **Enter** to save your changes.

   e. Press **Home** to return to the Home screen.

Transferring Data at the End of Fiscal Year

Custom Accounting Periods (contd.)

6. Select **Account**. The End of Accounting Period screen is displayed.

7. If you want to clear account data, select **Clear All Data**. The Confirm Clear Account Data screen is displayed.

8. Select **Clear All Data** to remove all account data from the system, or select **Clear Period Data** to remove the account data for the current custom period.

> End of Accounting Period
>
> Account data must be cleared.
>
> ◄ Print Reports
> ◄ Clear All Data
> ◄ Clear Period Data
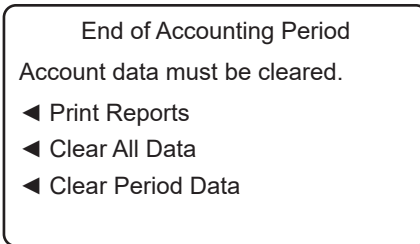
9. Select **Yes** to clear the data. Once the account data is cleared, the Accounts Setup menu is displayed.

8 • Troubleshooting

Troubleshooting INVIEW™Accounting

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

Refer to the *Chapter 11, Troubleshooting* in the DM100i, DM200L, DM125, DM225 Operator Guide (SV62276) for information on problems you may encounter while using the mailing system (for example, envelope sealing problems, envelope feeding problems, tape feeding problems, etc.).

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

Error Message/ Warning	Take This Action
Cannot Create New Account No space available for new accounts.	Select **Delete Existing Account**. Follow the prompts to delete an account from the system.
Cannot Delete Account First delete sub accounts.	You must delete all sub and subsubaccounts, starting at the lowest chargeable level, before deleting a first level account.
Cannot Save Manual Transaction Missing information.	Select **Return to Adding Trans**. Ensure that, at a minimum, the following selections are made: Account, Pieces, Postage and Weight.
Accounting Discrepancy \<postage amount\> Has been spent without being recorded.	• Select **Make a Manual Transaction** to continue running mail. The Manual Transaction screen is displayed with the postage amount equal to the amount listed on the Account Discrepancy screen. Refer to *Chapter 5, Transaction Options, Adding Manual Transactions* for more information. • Select **Ignore** to stop running mail. The system returns to the Home screen.

Troubleshooting INVIEW™ Accounting

Error Message/ Warning	Take This Action
External memory not responding. Please check the USB and memory device connections. Run mail without accounting? **NOTE:** We do not recommend running mail without accounting.	Check the USB and memory device to ensure they are properly connected. • Select **Try to Reconnect** if you want to recheck the device connections. The "Please Wait" screen is displayed as the system tries to reestablish the connection. • Select **Turn Accounting OFF** to run mail without accounting. This operation requires supervisor access privileges. - Cycle AC power on the meter. If the problem persists, refer to the *Pitney Bowes Contact Information List* at the front of this guide for the website addresses.
Accounting Register Full	• Select **Print Report** to print a report with the Accounting Register information. • Select **Reset** to reset the accounting register.

Troubleshooting INVIEW™ Accounting

Error Message/ Warning	Take This Action
Format Your Flash Drive: While troubleshooting an issue, a Pitney Bowes Customer Support representative instructs you to format your DM125 or DM225 flash drive.	**To format your DM125 or DM225 flash drive:** 1. Attach the flash drive to an available USB port on the machine. **NOTE:** Connect it directly to a port on the machine, do NOT connect it via a USB hub! 2. Press the **Options** key. 3. Scroll to and select **Advanced Features**. 4. Select **InView Records**. 5. Select **Erase memory stick**. 6. Press the **Yes** key. The screen will display "Please Wait …" for 5 to 15 minutes and the LED on the flash drive will flicker. **IMPORTANT:** Do NOT disconnect the flash drive during this procedure! Doing so will damage the flash drive! When complete, the screen will display "Memory stick successfully erased". 7. Select **Continue**.

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